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Terminology and Methodology of Strategic Planning

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Nearly every organization relies on a strategic plan. It's a multiyear roadmap focusing energy on gaining achievements.

Without a plan, day-to-day administrative tasks become priority. Significant goals are seldom reached. Mission creep may occur without focus on mission and vision.

Planning Team

The process for developing a plan includes convening a group of innovative, visionary and strategic thinkers. Because the activity occurs infrequently (about every three years) there is a need discuss the terminology and process.

The ideal number of people is less than 20. A larger group is difficult to maintain attention and slows the process.

A small group may limit input. The aim is a group size that allows for meaningful conversations. If there is a desire to involve more people, do it with advance surveys and focus groups.

Idea Generation

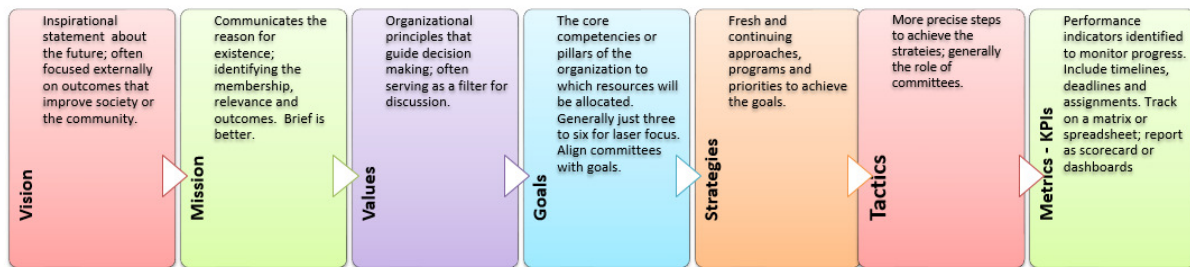
Attendees are likely to offer "new ideas." They want to leave their imprint on the plan. Remind everyone that it is just as important to delete or improve programs rather than adding new ones.

The challenge of new ideas is how they "fit." For instance, are they suggestions goals, strategies or tactics?

Be mindful of the statement, "I don't know how this fits but I'm going to throw it on the table." A contributor may not have considered aspects such as resources, performance measures and alignment.

Terminology

Familiarization with the planning terminology is the starting point.



Begin the meeting by defining terms and context. For example, how does a strategy affect a goal? What's the linkage between vision and mission statements?

This terminology applies to strategic planning globally:

Vision - Inspirational statement about the future; often focused externally on results that improve society or the community.

Mission – Communicates the reason for existence; identifying the stakeholders, relevance and outcomes. Brief is better.

Values - Organizational principles that guide decision making; often serving as a filter for discussion.

Goals -The core competencies or pillars of the organization to which resources will be allocated. Generally just three to six for laser focus. Align committees with goals.

Strategies – Fresh and continuing approaches, programs and priorities to achieve the goals.

Tactics – The more precise steps to advance the strategies; generally the role of committees.

Metrics and KPIs - Performance indicators set to monitor progress. Include timelines, deadlines and assignments. Track on a matrix or spreadsheet. Report as scorecard or dashboard.

After terminology is understood, approach the process methodically. Start with an affirmation of the vision and mission, moving to the more specific elements such as strategies and metrics.

Model Plan

This sample plan demonstrates the fit and flow of the elements. It places vision first, recognizing it is an aspirational outcome for the community. Followed by the mission identifying the organization, its members and services. From there follow values, goals and strategies,

This plan will guide successive boards and answer the frequent member question, “What do you do for me?”

It is succinct; easy to communicate and reference at board meetings. It should be of interest to members and stakeholders. This public plan is supported by a longer document that aligns committees, promotes accountability and sets deadlines.

Mammoth Lakes Board of REALTORS® 2017-2020 Strategic Plan  MAMMOTH LAKES BOARD OF REALTORS				
Vision	Mission	Values	Goals	Strategies
<i>To be the trusted voice for real estate by providing value to our members and our community we serve.</i>	<i>The mission of the Mammoth Lakes Board of REALTORS® is to advance the success of our REALTOR® members and protect private property rights.</i>	Honesty We promote an industry of truthful behavior amongst all business to business interaction, as well as all business to consumer interaction. Ethics We follow and abide by the National Association of REALTORS® (NAR) “Code of Ethics” and are proud to share that with our clientele. Education We recognize that real estate is an ever-changing industry and we pride ourselves on consistently continuing our education to be knowledgeable professionals within our field. Professionalism We possess the competence and skill set to represent ourselves and our clientele in the highest of standards.	Membership Value <u>Enhance the value of membership by providing resources to support the success of our REALTOR® members.</u> Professional Standards <u>Keep members and consumers informed on REALTOR® professional standards and the process.</u> Consumer Outreach <u>Be the “Voice for Real Estate” in our community and provide valuable information to our consumers.</u> Advocacy <u>Support the REALTOR® Party “Vote, Act, Invest” and increase RPAC contributions.</u> Association Excellence <u>Sustain a model association through member involvement, leadership and resources.</u>	*Increase professional development by offering educational programs and/or classes. *Keep members informed regularly through meetings, emails, social media, newsletter and/or website. *Keep Designated REALTORS® abreast of all new changes and policies to keep their agents and staff informed. *Educate our members on the importance of safety in the real estate industry. *Educate members on why maintaining the highest level of integrity is so important as a professional. *Provide ethics complaints, arbitration requests and related information to consumers through social media and website. *Educate members on the Professional Standards process and options (i.e. mediation and ombudsman services). *Increase participation & fundraising to enhance the REALTOR® image and show MLBOR as a supporting business entity in our community. *Promote homeownership, market statistics, real estate trends and the importance in using a REALTOR®. *Establish member liaisons to inform and provide consistent messages to our local government, etc. on how their decisions and actions impact real estate and private property rights. *Increase RPAC contributions by providing more opportunities to contribute, be a CA Silver Bear & encourage all BOD members to lead by example and contribute. *Continue to promote voter registration and increase participation in Calls for Action & Red Alerts. *Sponsor/Host events (i.e. candidate debates, interviews, local issues, etc.). *Encourage leadership and staff to attend meetings and training opportunities to increase their ability to provide excellence to our association. *Develop a new website and create a newsletter to better provide resources and meet the goals of our association. *Encourage more of our membership to take an active role by joining the Board of Directors or working on a committee or task force.

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Bob Harris, CAE, provides free governance tips and templates at www.nonprofitcenter.com