



# **Creating a Strategic Plan for Your Clinic's Future**

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# Objectives for this Session

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This workshop will strengthen the participant's ability to:

- Understand the benefits and purpose of the strategic planning process;
- Understand the steps to complete a strategic plan;
- Understand the components of a strategic plan;
- Develop specific next steps for their own organization upon completion of the workshop.

# Exercise

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## Stranded in the Desert



# Stranded in the Desert: Answer

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1. Mirror (Signaling)
2. Flashlight (Signaling)
3. Parachute (Signaling and shelter)
4. Raincoats (Collecting moisture)
5. Hunting knife (Food)
6. Book of edible plants in the desert (Food)
7. Loaded pistol (Protection and food)
8. Fifth of whisky (Medicinal)
9. Salt Tablets (No use)
10. Map of the desert (No use )
11. Compass (Don't need it if you are going to stay by the plane)

# Overview of Strategic Planning

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- **Strategic planning is a process to determine:**
  - where an organization is going within a defined timeframe
  - how it's going to get there; and
  - how it will know if it got there or not.
- **The strategic plan document is used to capture and align an organization's mission, vision, priorities, goals, activities and resources.**
- **The real benefit of strategic planning is the process, not simply the document:**
  - Helps to uncover assumptions, barriers and other issues
  - Gives everyone involved a shared understanding of the rationale for priorities and strategic direction.

# When Should Strategic Planning Be Done?

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- At the start of a new organization
- In preparation for a new venture
- Full strategic planning process every three years
- Update and action planning at least once a year

# Business Planning vs. Strategic Planning

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## **Business Plan**

- Primary audience is external
- Can be focused on specific product or service
- Components
  - Executive Summary
  - Company Description
  - Market Description
  - Product or Service
  - Sales & Marketing
  - Management
  - Financials

## **Strategic Plan**

- Primary audience is internal
- Focus is entire organization
- Components
  - Vision & Mission Statements
  - Values
  - Priorities, Goals & Objectives
  - Action Plan
  - Financials
  - Summary of Situation Analysis

# Benefits of the Process

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- Gives a roadmap to accomplishing the mission and vision
- Helps the organization to be better prepared for the future
- Helps leaders and stakeholders to develop a shared vision
- Creates buy-in and improves teamwork
- Creates renewed clarity and commitment to the organization's goals
- Enables better decision making at all levels
- Prepares leaders to communicate the vision and plans to others which can be used to attract resources to the organization
- Positions the organization to be proactive vs. reactive
- Provides a baseline to measure and monitor progress
- Challenges the status quo.

# Overview of the Strategic Planning Process

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- Preparation Phase
- Strategic Planning Process
- Wrap up Phase

# Strategic Planning Process – Preparation Phase

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## **Answer key questions before beginning the planning process:**

- What significant issues should be addressed in the plan?
- Who should be involved? Board, staff, volunteers, other stakeholders?
- Scope and timeframe of process?
- How will strategic plan document be used? Will it be shared with those outside the organization?
- Will process be facilitated by inside person or external consultant?

# Strategic Planning Process

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- Define or review mission, vision & values
- Complete Situation Analysis
- Develop Strategic Priorities
- Create One-Year Action Plan

# Strategic Planning Process

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## **Review or define mission, vision & values**

- Mission – brief statement of the organization’s purpose. Should answer the questions, “Why do we exist” and “What do we do.”
- Vision – description of desired impact; picture of success.
- Values – guiding principles. Answers the question, “What do we believe in.”

# Strategic Planning Process

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## **Situation Analysis**

- Review history and accomplishments and note “lessons learned”
- Perform SWOT (strengths, weaknesses, opportunities, threats) analysis
- Obtain input from stakeholders through focus groups or surveys
- Complete need assessment or community asset map
- Review relevant statistical or demographic data
- Review relevant best practices and community trends
- Document summary of situation analysis.

# Strategic Planning Process

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## Develop Strategic Priorities

- **Priorities** – areas of focus
- **Goals** – broad, outcome statements that guide the organization's programs, administrative, financial & governance functions.  
*Example: To increase the coping skills of families in stress.*
- **SMART Objectives** – **S**pecific, **M**easurable, **A**chievable, **R**elevant & **T**ime-bound targets needed for the accomplishment of goals.  
*Example: Present two workshops for families every quarter.*
- **Determine Impact on Budget** – are plans feasible; what resources will be required to implement plans?

# Strategic Planning Process

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## **Create One-Year Action Plan**

- Describes specific steps to be taken over the next year.
- Describes who will do what and by when.
- Should be brief – chart form.

# Wrap Up Phase

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- Document the plan
- Determine implementation strategy
- Celebrate completion of the process
- Communicate the plan
- Ongoing: monitor progress and determine course adjustments as needed.

# Tools for Strategic Planning

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## **Books:**

*Strategic Planning for Nonprofit Organizations* by Michael Allison & Jude Kaye

*The Nonprofit Strategy Revolution: Real Time Strategic Planning in a Rapid-Response World* by David La Piana

## **Articles/Websites:**

“Ten Keys to Successful Strategic Planning”

<http://www.uwex.edu/aspi/toolbox/documents/Strategic%20Planning%20Steps.pdf>

“Strategic Planning in Smaller Nonprofit Organizations”

<http://www.wmich.edu/nonprofit/Guide/guide7.htm>

# Tools for Strategic Planning

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## **OneStar Foundation Sponsored Tool: The CCAT Organizational Assessment**

- The Core Capacity Assessment Tool (CCAT) was created by Peter York and the TCC Group
- Provides assessment of long-term capacity building needs
- Measures four core capacity areas: leadership, adaptive, management and technical
- Also measures organizational culture and lifecycle score
- Administered to senior leaders such as executive staff, management staff, board members and senior volunteers.

# Tools for Strategic Planning

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## **The CCAT Organizational Assessment (cont.)**

Produces report that includes information on

- Interpreting results
- Scores for each capacity area
- Prioritized capacity building plan with specific recommended actions and list of helpful resources
- For more info, including sample report see CCAT website at <http://www.tcccat.com> .
- Register with OneStar to take CCAT at [www.onestarfoundation.org](http://www.onestarfoundation.org)

# Thank you for coming!

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For any questions or comments, my contact info is:

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