**Strategic Planning**

*Workshop Guide*

**Objectives**

Participants will be able to
1. Understand the concepts of mission, vision, organizational goals, and organizational values as they relate to strategic planning;
2. Understand the basic components of a strategic planning process;
3. Be able to develop and implement a plan of action.

**Materials Needed**

- Flipchart & Markers
- Small candies for prizes
- Copies of the following materials for each participant:
  - “Examples of Organizational Mission, Vision, Values, & Goals”
  - “Develop a Strategic Plan”

**Workshop Outline**

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Icebreaker – 10 Minutes – “Who Said That?”

Create a list of 7 - 15 famous quotations that you can read to the group. Some example quotations are provided at the end of this module. Ask the group to identify who said the quote, and give out candy for correct answers. If no one in the group knows the answer, give them a short list of possible answers. Again, give out candy for correct responses. Play until you run out of quotes or you have used the time planned for this activity. Remember, the idea is to have the participants think about visionary leadership, not to test their knowledge. Try to select quotes related to visionary leadership and strategic planning.

When the activity is over, connect the idea of having a vision of the future to strategic planning by saying something like the following.

Leaders may have a vision that inspires people to work toward positive change, and they can also lead an organization with a realistic and plausible plan to achieve that vision.

Introduction – 5 Minutes

It is unlikely that many of the participants have had experience with strategic planning in a non-school-related situation. Therefore, the participants may be able to understand the content of the workshop more readily if they can relate it to personal experience. Ask the participants the questions below. The participants do not need to answer the questions; they just need to think about them. This will personalize the ideas presented in the workshop and provide a context for participants to understand strategic planning in an organizational setting.

While this workshop is focused on leading organizations, the same processes that we use to lead organizations are the ones we use to direct and shape our personal lives. As I ask the following questions, I’d like you think about them, relating them to your personal goals. You do not need to speak, but consider the following.

Allow a few seconds between each question for the participants to consider them.

- What do you see yourself accomplishing in the next five years?
- What plan do you have in place to achieve your goals?
- What resources do you have to help you?
- What challenges might hinder you?
- How will you know if you are making progress?
- What have you done thus far to make progress toward your vision?

Many times, answers to these questions are implicit in the way we structure our daily activities, whether we think about them explicitly or not. Whether we are directing our own personal futures or orchestrating the future of an organization, the ability to give intentional and purposeful thought about what we do, why we do it, and how best to do it can greatly improve our performance and chances for success. This is the essence of strategic planning.

Both profit and non-profit organizations face changing environments that create challenges for their leaders. Some organizations fail in their ability to meet changing situations, while others adapt to meet challenges and achieve inspiring results. Strategic planning is an important factor in the success of any organization. Careful strategic planning allows organizations to have a deep understanding of their
strengths, weaknesses, opportunities, and challenges. Furthermore, a good strategic plan provides leaders with an assessment of where they are and a map of where they are going, with tangible markers of success and ways of measuring progress along the way.

**Topic Discussion – 25 Minutes**

**What Is Strategic Planning?**

According to Bryson (1995), strategic planning is “a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it. The strategic planning process aligns an organization’s mission, vision, and goals in order to create a consistent and congruent blueprint for the organization’s future.”

Strategic planning evolved when organizations began to imitate the way the military made decisions. At that time, planning and decision making were conducted by a few people at the top of an organization. Leaders would analyze situations and make decisions regarding appropriate steps for the organization. They sometimes produced a document referred to as a “strategic plan.”

In the 1950’s, the use of strategic planning in both public and private agencies became widespread. However, the popularity of strategic planning faded until the 1990’s, when researchers showed benefits resulting from the strategic planning process. It became a useful way to help organizations, as they struggled with rapid change, develop a direction for their future and focus their resources accordingly. Today, strategic planning efforts are initiated by leaders at the top but actively engage members of the organization, as well as stakeholders outside the organization, in the planning process.

Strategic planning is a leadership tool that helps an organization make intentional decisions regarding what the organization does now and how it will do what it does in the future, why the organization engages in particular activities, and how the organization will meet its goals. Mission, vision, organizational values, and organizational goals are important foundations in the strategic planning process.

There are a number of strategic planning models organizations can follow that differ with respect to scope and complexity (Bryson, 2004; Bryson & Alston, 2005). Organizations enter the strategic planning process with different needs and different foundations. Some organizations may have important components of the strategic planning process in place before even considering a formal strategic plan, while others may need to start with articulating a mission and vision. Additionally, some organizations may not have much experience with strategic planning or resources to undertake the process. Therefore, when you use strategic planning with your organization, it will be helpful for your group to review various models and select a framework that meets the skills of your group members and the needs of the organization.

According to Bryson and Alston (2005), the desired results of strategic planning can lead to:

- Increased effectiveness
- Increased efficiency
- Improved understanding of the organization
- Better decision making
- Enhanced organizational capabilities
- Improved communications and public relations

There are four important concepts that build the base of a strategic plan: mission, vision, organizational goals, and organizational values. In order to develop and implement a strategic plan, an organization must have a sense of its purpose and its guiding principles. We’re going to discuss each of these concepts by critiquing some examples from organizations and companies.
Organizational Mission, Vision, Values, & Goals

Distribute the “Examples of Organizational Mission, Vision, Values, and Goal Statements” activity sheet. Ask participants to read it and write comments in the margins. Allow a few minutes for them to read and then write their responses.

Organizational Mission

Let’s start by talking about an organizational mission. A mission expresses the reason the organization exists; it is a statement of purpose. A mission should be clear and concise about what the organization does, whom it serves, and its uniqueness.

Let’s take a look at the mission statements on the handout. What are your reactions? Are the missions clear?

Allow time for responses. If time allows, encourage participants to craft a “better” mission statement from one of the examples.

Many of you are likely members of organizations. Do you know the mission of the organizations to which you belong? Can you provide an example?

Allow a few minutes for responses.

Organizational Vision

An organization’s vision, on the other hand, is a statement of what the organization aspires to become. A vision provides a future direction for the organization. It describes where the organization desires to be in the future; sets an ideal that stretches the resources of the organization, yet is attainable; and inspires members to want to achieve that future.

Let’s take a look at the vision statements on the handout. What is your reaction to these statements? Do they describe a desired future? Are they inspiring?

Allow a few minutes for participants to respond. If time allows, encourage them to discuss what would make a “better” vision statement for one of the examples.

As you think about the organizations to which you belong, do they have a vision statement? Have you helped an organization develop a vision?

Allow a few minutes for responses.

Point out the difference between a mission and a vision statement. A mission statement is short and expresses the purpose of an organization; a vision statement, on the other hand, “paints a picture” of a desired future state and provides direction.

Organizational Values

An organization’s value statements are the principles, standards, beliefs, and actions that members of an organization consider important and feel represent their activities. Values should serve as guideposts for decision making.

Let’s take a look at the value statements on the handout. What is your reaction to these statements?

Allow a few minutes for participants to respond.

Do the organizations to which you belong have values that are articulated? All organizations have values, but not all organizations have gone through a process to articulate their values or express them openly.

Allow a few minutes for responses.
Organizational Goals

Organizational goals are end results toward which institutional resources and activities are directed. As such, they are the means to resolve critical issues in the organization and achieve the desired future. Goals should be clearly articulated, achievable, and aligned with the organization's mission and vision.

Let's take a look at the organizational goals on the handout. What is your reaction to these goals?

Allow a few minutes for responses.

As you think about the organizations to which you belong, do you go through a process to set goals? Who sets the goals? How is this done?

We are now going to practice developing a strategic plan so you become more familiar with the basic elements of a plan.

Activity – 40 Minutes – Develop a Strategic Plan

Divide the participants into small groups of approximately five people each, and distribute the “Develop a Strategic Plan” activity sheet to each participant. Read the instructions on the worksheet. Allow approximately 30 minutes for the small groups to do the activity. When they are finished, ask each group to report back to the larger group and discuss. Encourage questions and discussion. Encourage participants to lead a similar activity with the organizations in which they participate.

Reflection, Application, & Summary – 10 Minutes

Take a few minutes to answer the following two questions.

1. What are three points presented in this workshop that you can use with an organization to which you belong?
2. What is one goal you have for an organization to which you belong? What information do you need to know in order to develop an implementation plan for this goal?

- Strategic planning is a leadership tool that draws on many other concepts of leadership:
- Teambuilding – The planning process is best as a team endeavor involving multiple groups and stakeholders.
- Communication – Communication among team members is important when forming mission and vision statements.
- Conflict management – There is likely to be different opinions regarding where an organization should go.
- Self-awareness – Leaders must understand their own roles and abilities within an organization.
- Understanding differences – Team members must understand differences among one another as they work to implement a plan.
- Values and character – Leaders must understand their own values and shape the values of their organization.
- Understanding organizations – Leaders must understand how to work with organizations to advance their organization’s goals.

The strategic planning process can be exciting because it is complex and challenging. Like all of the other leadership tools, one becomes better at strategic planning with practice.
References


Sample Quotations for the Icebreaker

The following quotations were taken from Great Quotes from Great Leaders, by Peggy Anderson and Michael McKee (1997, Franklin Lakes, NJ: Career Press). Quotations can also be found at various Web sites by doing a Google search for “quotations”.

Quotation About Vision

I have a dream that one day this nation will rise up and live out the true meaning of this creed—We hold these truths to be self-evident: that all men are created equal.

Marin Luther King Jr.

I look forward to a future in which our country will match its military strength with our moral restraint, its wealth with our wisdom, its power with our purpose.

John F. Kennedy

We must build a new world, a far better world—one in which the eternal dignity of man is respected.

Harry Truman

Quotations Providing Perspectives On Process

It is a mistake to look too far ahead. Only one link in the chain of destiny can be handled at a time.

Winston Churchill

If passion drives you, let reason hold the reins.

Ben Franklin

In any moment of decision the best thing you can do is the right thing, the next best thing is the wrong thing, and the worst thing you can do is nothing.

Theodore Roosevelt

If you neglect to recharge a battery, it dies. And if you run full speed ahead without stopping for water, you lose momentum to finish the race.

Michael J. Fox

Plan your work for today and every day, then work your plan.

Norman Vincent Peale

Keep your face to the sunshine and you cannot see the shadows.

Helen Keller

Nothing is particularly hard if you divide it into small jobs.

Henry Ford

Quotations on Values

When I examine myself and my methods of thought, I come to the conclusion that the gift of fantasy has meant more to me than my talent for observing positive knowledge.

Albert Einstein

A life is not important except in the impact it has on other lives.

Nelson Mandela

It is good to have an end to journey toward, but it is the journey that matters in the end.

Ursula Leguin
Examples of Organizational Mission, Vision, Values, & Goals

Instructions: Read the following mission, vision, values, and organizational goals. Critique the statements in terms of their clarity, meaning, and/or inspiration. Write your comments in the margins.

Mission Statements

Saturn Division of General Motors: To market vehicles developed and manufactured in the U.S. that are world leaders in quality, cost, and customer satisfaction through the integration of people, technology, and business systems and to transfer knowledge, technology, and experience throughout GM.

Eastman Kodak: To be the world’s best in chemicals and electronic imaging.

American Red Cross: The mission is to improve the quality of human life; to enhance self-reliance and concern for others; and to help people avoid, prepare for, and cope with emergencies.

Source: http://www.csuchico.edu/mgmt/strategy/module1/tsld012.htm

Vision Statements

Historic Third Ward Association: The Historic Third Ward’s unique attributes and resources will be enhanced and developed to create a self-sustaining environment in which to live, work and play, so distinct in character that it is recognized as both a place and a state of mind.

Elvehjem Museum of Art: The Elvehjem Museum of Art will be a leader among university art museums. Supported by the resources of the Kohler Art Library, it will be a dynamic center for research, education and experimentation in the visual arts.

Center for the Deaf and Hard of Hearing: The Center for the Deaf and Hard of Hearing will be the recognized statewide leader providing a continuum of dynamic and innovative programs for persons of all ages who are deaf or hard of hearing.

Source: http://www.createthefuture.com/sample_vision_statements.htm

Organizational Values

John Deere: John Deere’s values - integrity, quality, commitment and innovation - can be traced back to the company’s founder, John Deere.

Examples of Organizational Mission, Vision, Values, & Goals (continued from page 12-9)

_Eli Lilly:_ Since its founding in 1876, Eli Lilly and Company has been rooted in a culture that values honesty, hard work, and caring for our community.


_ConAgra:_ At ConAgra Foods, we have built a culture of simplicity, accountability and collaboration. Diversity and Inclusion are vital to that culture... By creating an inclusive culture which leverages our diversity, we empower every individual in the organization to grow to their fullest potential.


Organizational Goals

_Undergraduate of Wisconsin-Madison:_ Integrate learning throughout the undergraduate experience. Create a learning environment that responds to students’ diverse needs and backgrounds. Assist students in preparing for citizenship in a diverse and global world.


_National Science Foundation:_ The four interrelated goals—Discovery, Learning, Research Infrastructure and Stewardship—adopted by the National Science Foundation establish an integrated strategy to deliver new knowledge at the frontiers, meet vital national needs and work to achieve the NSF vision.


_NASA:_ Fly the Shuttle as safely as possible until its retirement, not later than 2010.

Complete the International Space Station in a manner consistent with NASA’s International Partner commitments and the needs of human exploration. Develop a balanced overall program of science, exploration, and aeronautics consistent with the redirection of the human spaceflight program to focus on exploration. Bring a new Crew Exploration Vehicle into service as soon as possible after Shuttle retirement. Encourage the pursuit of appropriate partnerships with the emerging commercial space sector. Establish a lunar return program having the maximum possible utility for later missions to Mars and other destinations.

Develop a Strategic Plan

Instructions: In your small group, create a fictional organization. Determine the type of organization, indicate the field or industry in which your organization operates, and identify the customers for your organization’s products or services. Then create a name for your organization, and develop mission, vision, and goals statements.

1. Identify a type of organization your group wants to develop. (Examples: non-profit, for-profit, charitable foundation, government agency, social/interest group, union, etc.)

2. Determine a field or industry in which your organization will work. (Examples: social service, financial, food distribution, recreation, energy, etc.)

3. Identify the customers for your organization’s products or services. (Examples: general public, children, auto industry, elderly in supported care, teens, large equipment manufacturers, etc.)

4. What is your organization’s name?

5. What is your organization’s mission?

6. What is your organization’s vision?
Develop a Strategic Plan (continued from page 12-11)

7. What are your organization’s goals? (Identify 3-5 goals)

8. What resources will your organization need to implement the plan?

9. What obstacles might your organization encounter? How will your organization address these challenges?

10. What plans does your organization have to evaluate progress? How will your organization know if it is achieving its goals?
About Leadership in Action

Leadership in Action is a multi-state leadership development program for college-age students. It was funded in part by an USDA/CSREES HEP Challenge Grant, 2005-2009 to the University of Illinois, Purdue University, and the University of Wisconsin – Madison. Undergraduate students from those universities participated in a 21-month program during which the workshop modules were developed, used during the two cohort programs, reviewed, and revised.

We intend that students who have been trained in conducting effective workshops use these materials for leadership workshops with various student organizations. The materials can be used separately for individual workshop sessions, in any combination for a short-term program, or in their entirety for a long-term program.

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