

# **Want A good Plan?**

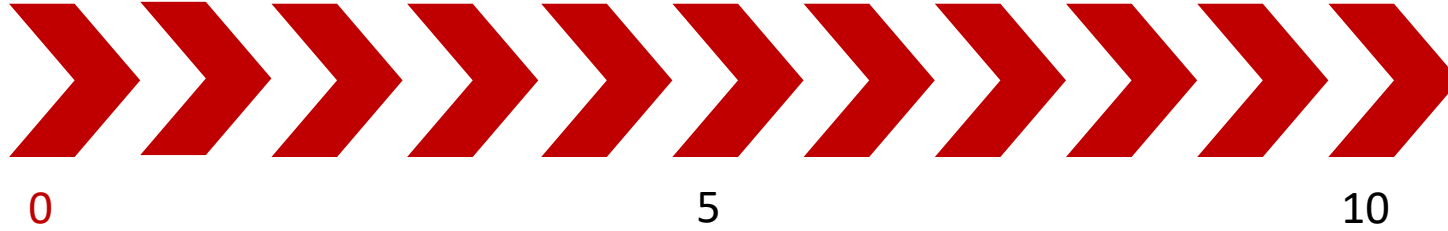
## **Get Strategic.**

**Sayge Medlin, Public Service Faculty**  
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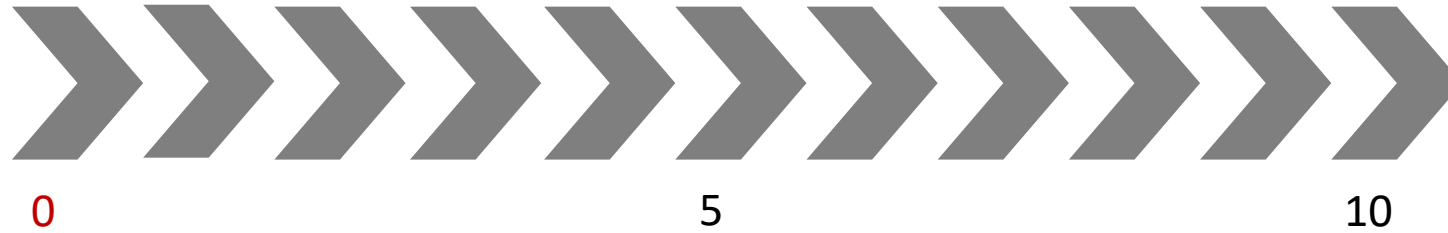


# PLANNING – relevance to your work

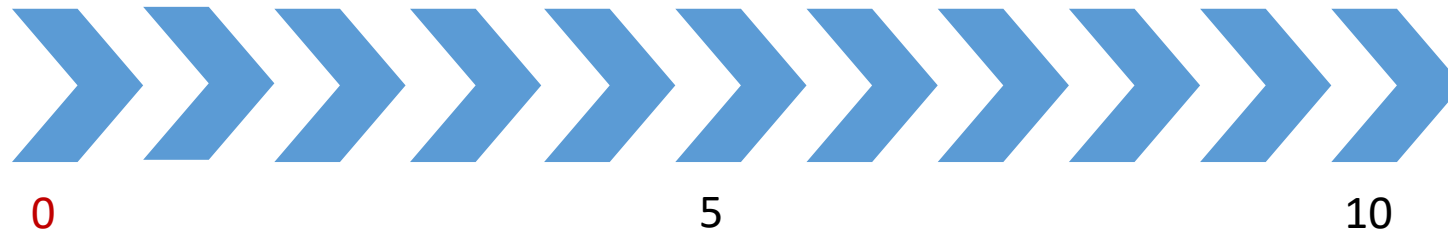
INDIVIDUAL



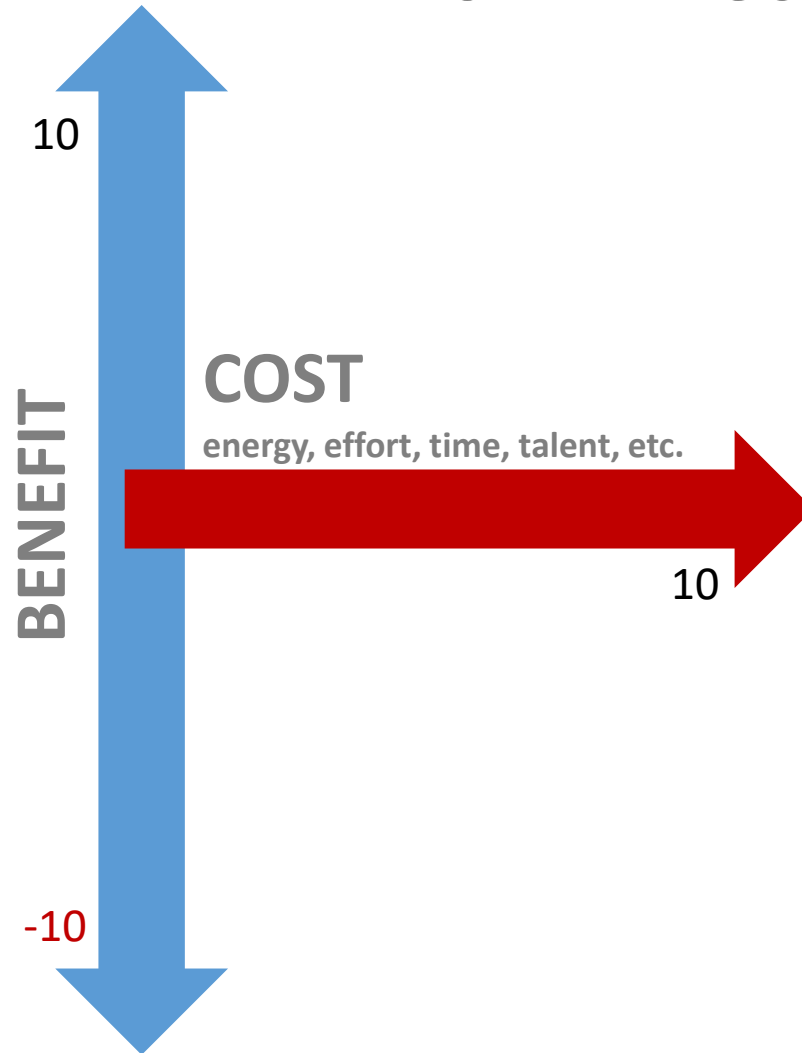
TEAM



ORGANIZATION



# PLANNING – your return on investment



**Describe your  
most potent  
planning  
experience in**

**1 word.**

WHAT MAKES  
SOME PLANS  
BECOME  
INDISPENSIBLE?

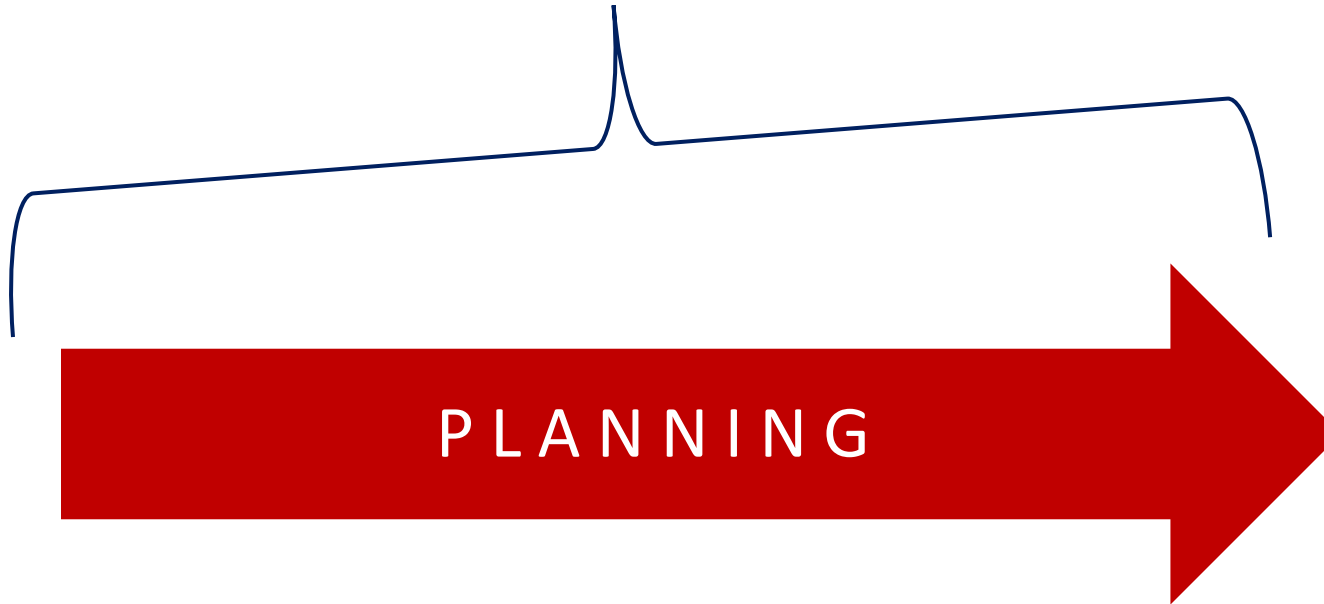




WHILE  
OTHERS  
GATHER  
DUST?



*Process*



P  
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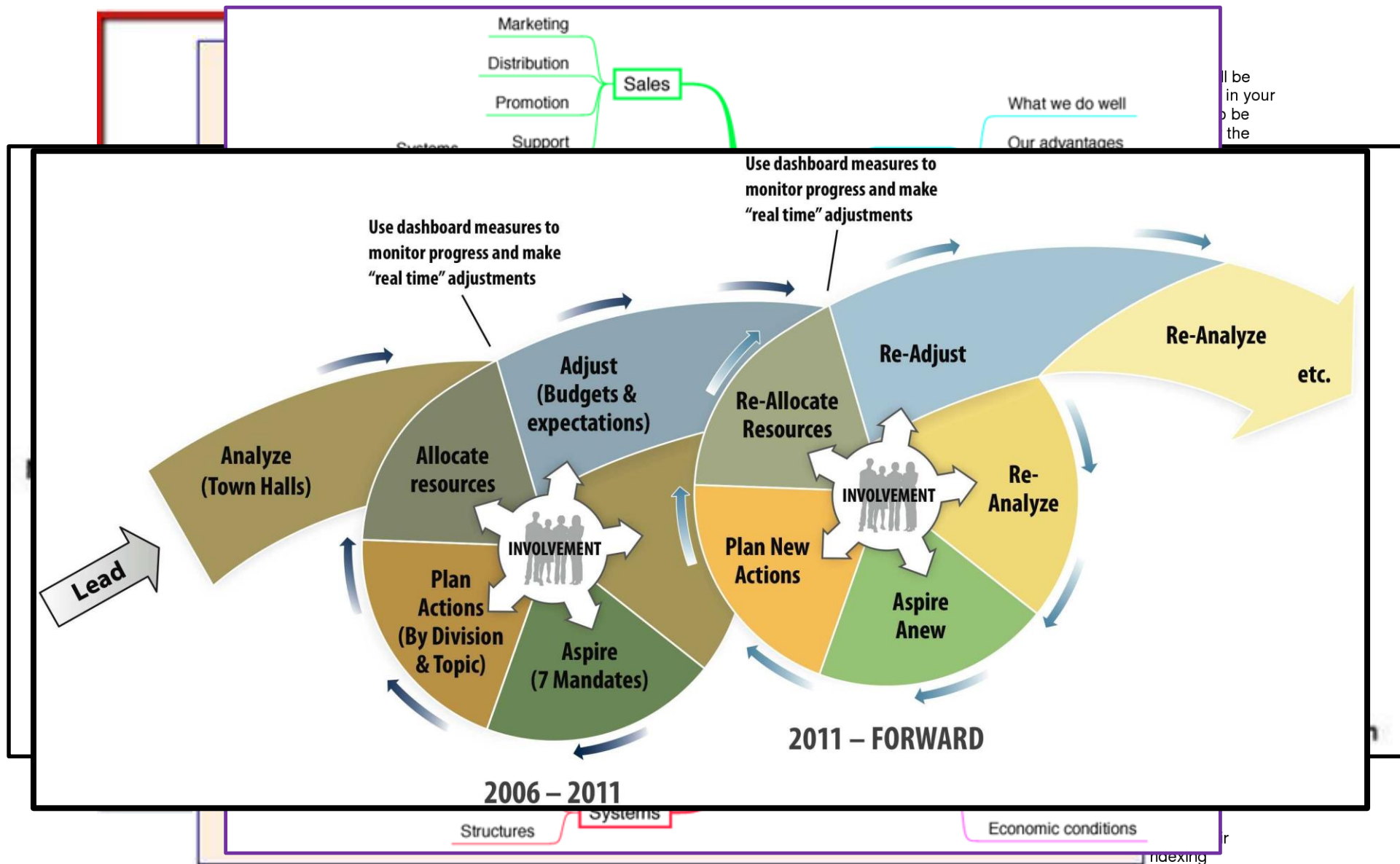
*Product*

# OBJECTIVES

- Key Components of Every Strategic Planning Process
- Review Questions All Organizations Should Answer Before Beginning Strategic Planning
- Characteristic of Effective Strategic Plans







information to promote the corporate objectives of: increased knowledge sharing among departments, reduction of development redundancies through more ready

# STRATEGIC Planning

*Origin of the word **Strategy**:*

the art of a leader,

specifically in directing large military movements  
as part of a larger course of action



# Strategic Planning

*Bringing **strategy** to organizational planning:*

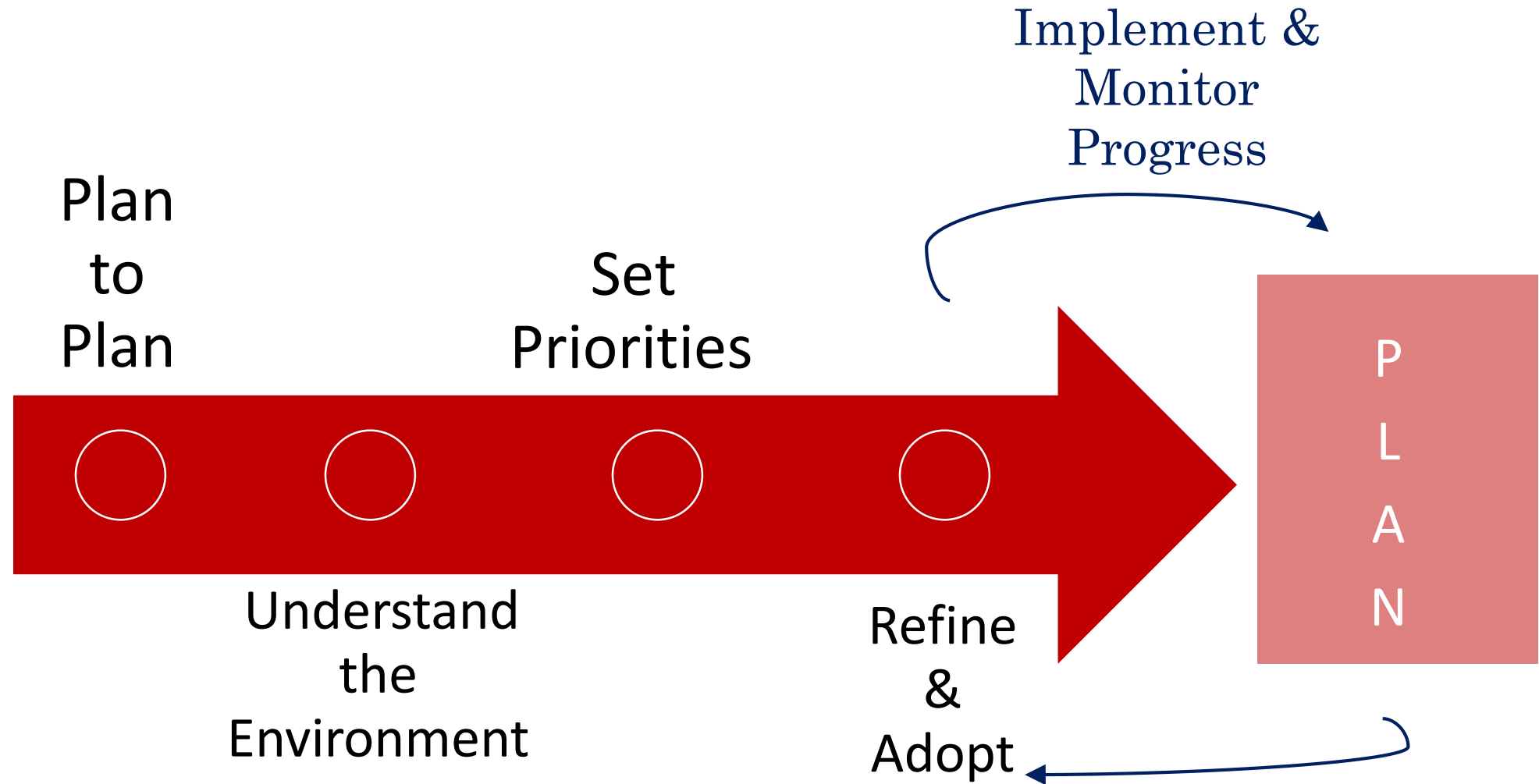
- The art of leaders, specifically as they work to ensure individuals within an organization are pointed in the same direction,
- working in an agreed upon process,
- with an agreed upon purpose—
- all on behalf of an agreed upon vision.



# Strategic Planning - PROCESS

1. Plan to Plan
2. Understand the Environment
3. Set Priorities (what you will accomplish and how)
4. Refine & Adopt
5. Implement & Monitor Progress







Get Strategic.

Plan to plan

19



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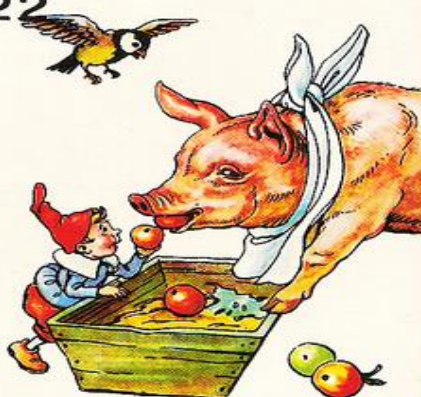
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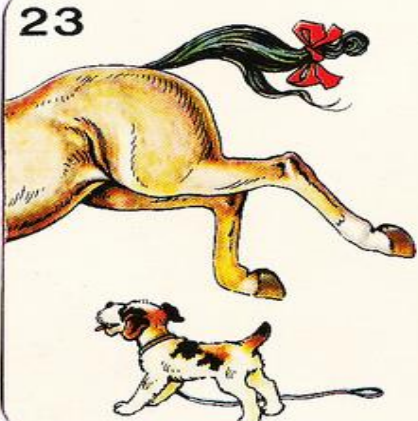
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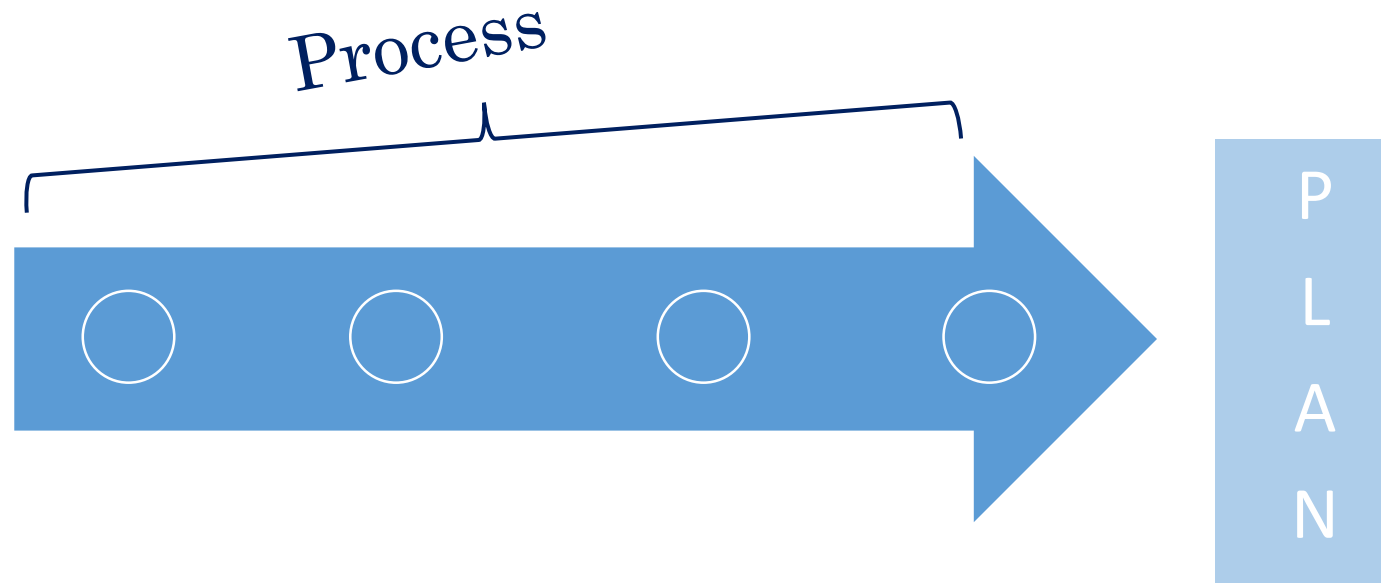


15



# Plan to Plan - OBJECTIVE

ASK: Why do you need a plan?



# Plan to Plan - objective

- Meet accreditation or funder requirements
- Gather the strays















# Plan to Plan - Objective

## **ASK: Why do we want or need to plan?**

- Promote a common understanding among stakeholders as to why the organization exists, what it does, how it does what it does
- Create or refresh a basis, or a framework, for decision-making and resulting actions
- Fulfill a funder requirement
- Project resource needs – staff, \$\$, facilities, etc.



# Plan to Plan - Objective

## **ASK: Why do we want or need to plan?**

- Model an inclusive, decentralized decision-making process
- Gather strays and build momentum
- Improve systems, processes
- Educate stakeholders or staff regarding organizational history
- ?





# VISION



J.W.  
for  
UNIV







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**TARGET**





**RESPONSE**





# PROBLEM



# Plan to Plan - Objective

**ASK: What questions do we need to answer through the process?**

Examples:

- What is the public perception of our work/staff/etc.?
- What are the trends in our field?
- What will we do over the next \_\_\_\_ months/years?
- What is the consumer opinion of our work/facilities/future?
- Why doesn't anyone seem to know about us?
- What are we doing well?
- What can we stop doing?
- Who are our potential partners?
- Are our mission and vision still relevant?
- Does everyone within our organization have the same understanding of what we do and why?



# Plan to Plan - Objective

**ASK: What do we want our end product to be? What will work best to meet our needs and our style of work?**

- A guide – map
- A prescriptive report with detailed instructions
- An update to a current plan



# Plan to Plan - Timing

**ASK: Are we ready to achieve our objectives for a planning process?**

- Do we have, or can we easily get, buy-in of leadership and staff?
- Are we stable enough to commit time and resources?
- Are we too comfortable to ask (and answer) the necessary questions of ourselves?



# Plan to Plan - Skill

**ASK: Have you ever developed a strategic plan?**

Yes

Reflect and apply learnings

- How did you use the plan?
- What did you learn?
- What will you repeat?
- What will you do differently?

No

Identify Resources

- Who can you learn from?
- Where can you get information?
- Who can offer assistance or counsel?





# Plan to Plan – Organizational Will

**ASK: Who is interested in planning? Who has expertise?**

- Project managers, natural planners
- Group facilitators, consensus builders
- Note takers, writers, editors
- “Timekeepers” & vision keepers
- Connectors
- Researchers

use  
people  
as  
resources



# Plan to Plan – Organizational Will

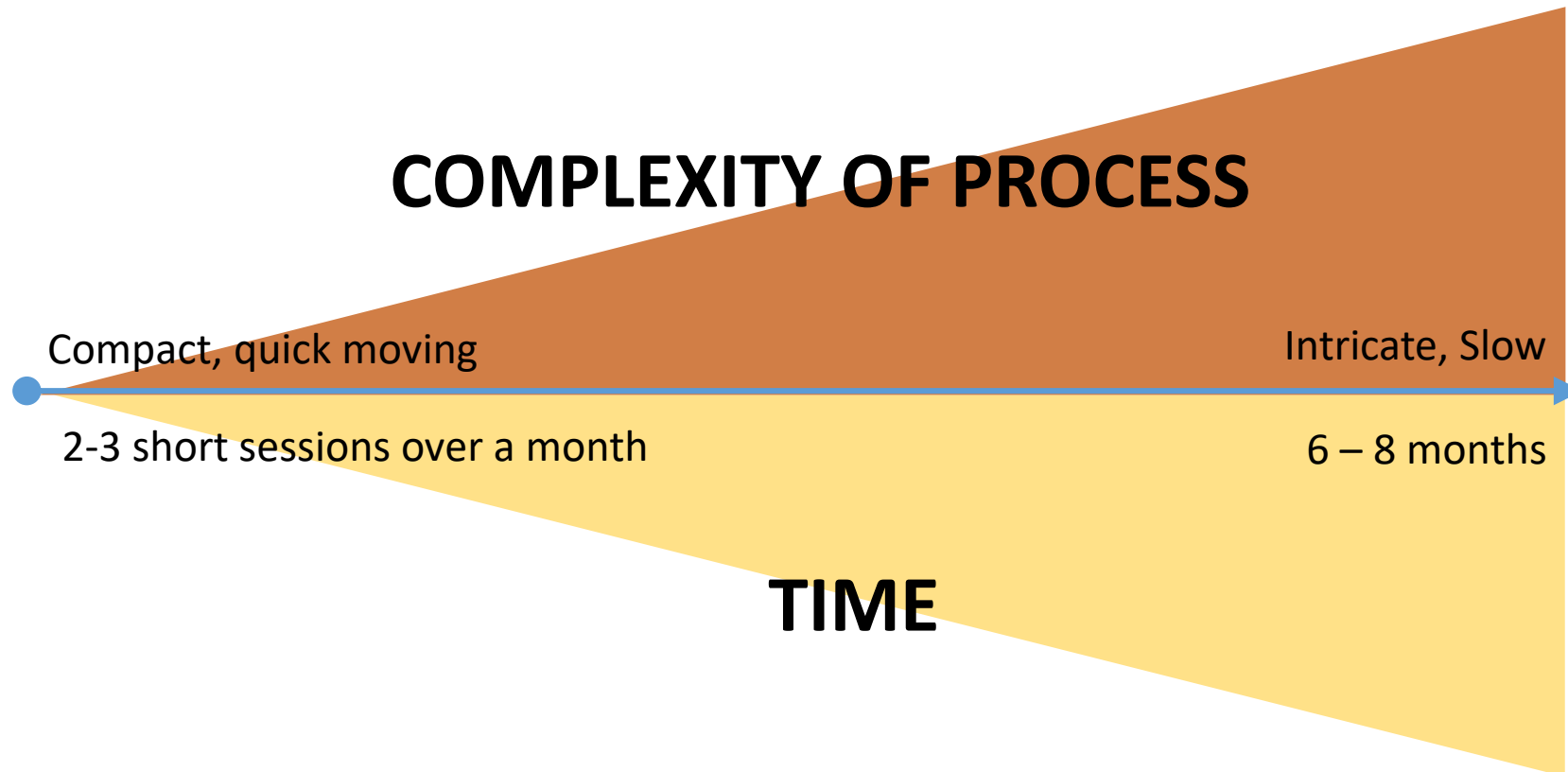
**ASK: Who is wary? How will you address the skepticism?**

- Have and articulate a clear reason for planning
- Create and share a process that makes sense
- Build in and share milestones that allow others to see progress
- Ask at every stage: “Is this a good use of time and talent?”
- ?



# Plan to Plan - TIME

**ASK: How much time can you invest?**



# Plan to Plan - Stakeholders

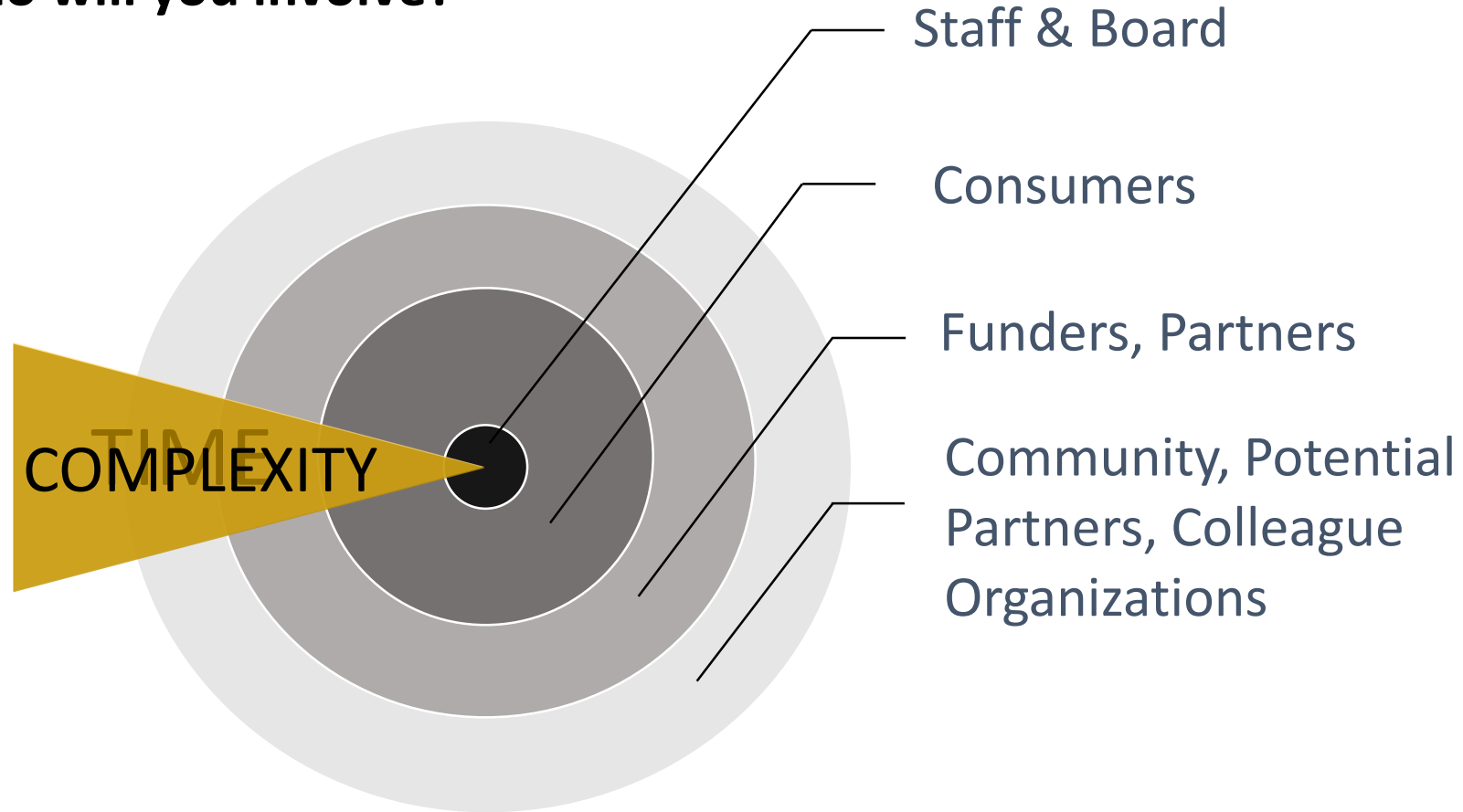
**ASK: Who will you involve?**

- Who do you need to hear from?
- Who do you need a closer relationship with?
- Who needs to be intrigued by your organization?



# Plan to Plan - Stakeholders

**ASK: Who will you involve?**





# Plan to plan - Resources

**ASK: What resources do we have?**

**ASK: Who will facilitate the process?**

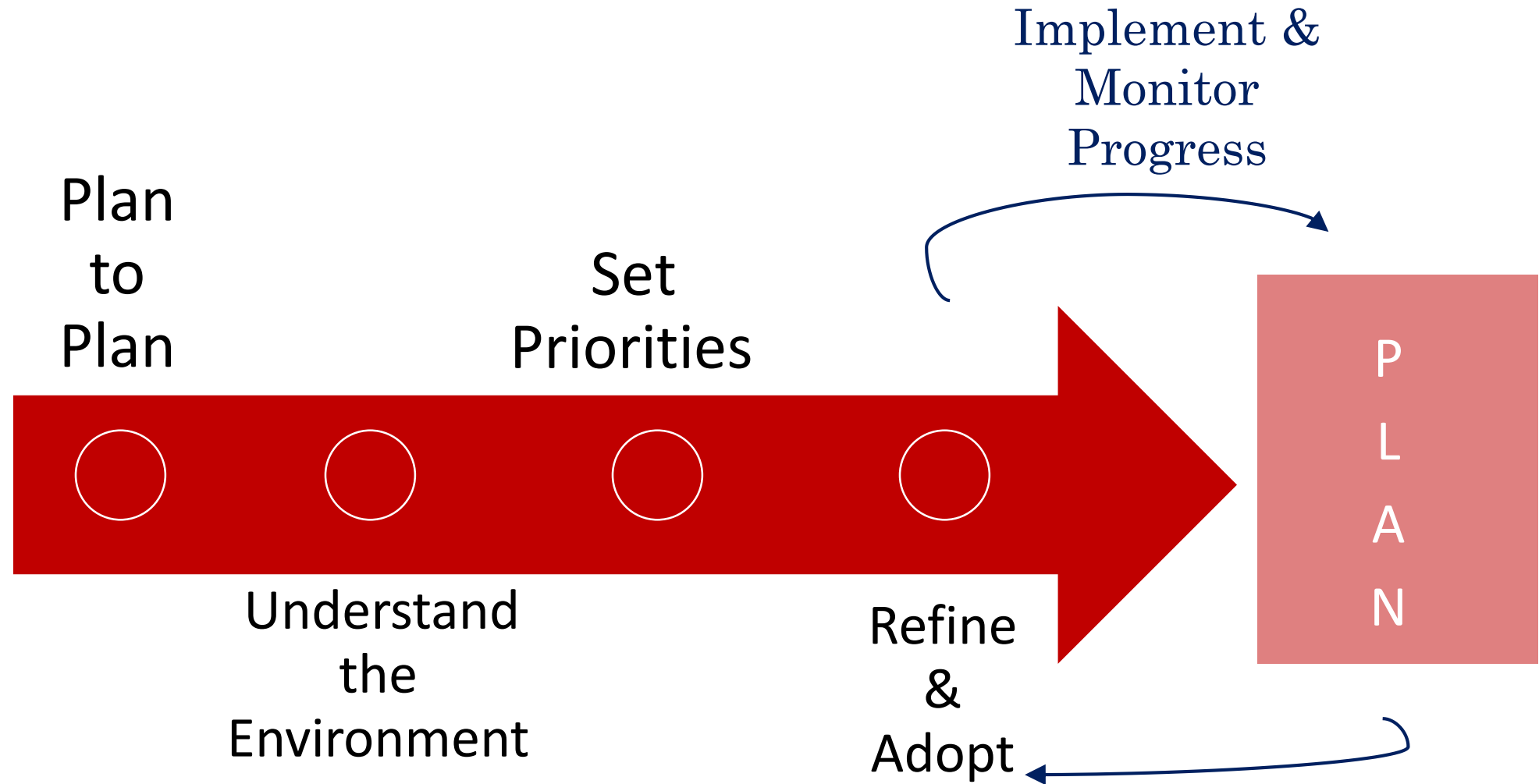


# Get Strategic.

Understand the Environment

Set priorities

Refine & Adopt







# Which planning process is right for us?

The one that leads to a plan that you will **use**.



# References

- Photos:
  - Beverley Goodwin, Laura Thorne, Mike Boening, Carolynn Primeau, <https://www.flickr.com/photos/noodle/>,
  - <https://creativecommons.org/licenses/by/2.0/legalcode>
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- Waechter, S. A. (2010). Driving strategic planning: A nonprofit executive's guide. Washington, DC: BoardSource.



# CONVERSATION. Questions.

