

## Thinking for the future

### *Understand possible obstacles.*

The process of strategic planning often generates a variety of feelings among participants, and may overwhelm some staff or advisors, especially those who manage a heavy workload on an ongoing basis. Explain, in advance, that these feelings are typical and need not be an obstacle to completing the planning process. Be on the alert for signs of anxiety or procrastination. Be prepared to deal with these situations by pointing them out to the group or providing one-on-one support as necessary.

Although most organizations tend to invite all participants to attend a meeting to develop the strategic plan collectively, this may not be effective in all situations. Another alternative would be to compile suggestions from all participants



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# How to Develop a Strategic Plan

by Laura Dutil Aird

**S**trategic planning is a necessary activity in today's business world. Creating a long-range plan is important because it allows you to identify goals and priorities, develop step-by-step action plans, evaluate progress made, and, most importantly, improve program quality. But how do you decide what should be listed in the plan? Or what can you do to make sure the strategic planning process produces tangible results? Follow these recommendations to help you produce a strategic plan for your organization:

### *Request input from key individuals.*

Survey community leaders or hold a meeting to determine how the program or services offered by your organization could be improved. Include individuals such as local physicians, school principals, social service representatives, child welfare workers, business owners, public health officials, or early childhood educators. Select staff and clients should also be asked to participate. Use results from a

recent customer satisfaction survey to determine areas needing work.

### *Compile a comprehensive list of suggestions.*

Encourage participants to brainstorm and discuss creative ideas. Provide positive feedback to all who participate and thank them for their input. This allows everyone to share issues important to them and doesn't immediately discount suggestions that might be more difficult to implement.

during a general meeting and then ask two or three individuals with appropriate expertise to work together to develop an initial draft of the strategic plan.

### ***Develop goals.***

Group suggestions into common categories such as finances, administration, program quality, health, education, or facilities management. Write two to five goals or anticipated outcomes. Examples of goals might include the following: increase the bottom line profit margin, improve the quality of the educational program, or establish a parent participation program.

### ***Determine objectives.***

Develop specific objectives for each goal. Objectives should be clear, targeted, and measurable. Examples might include: increase income by 10%, remodel the kitchens and bathrooms, develop a plan to assess staff training needs, decrease food expenses by 5%, implement new curriculum for two year olds, or improve hand washing and sanitation procedures. Sometimes it is easier to write the objectives first and then determine general goals.

### ***Outline action steps.***

List the steps that need to be taken to complete each objective. If it is apparent that staff does not have the expertise or resources needed to complete a particular action step, do not see this as a barrier to completing the planning process. Include additional steps when needed to allow for identification of possible funding sources, locating necessary materials or consulting experts.

### ***Prioritize activities; determine appropriate timelines.***

You have just expended a lot of effort to develop a long list of activi-

ties which, if you were to complete it, would require several additional staff. You can use the strategic plan to advocate for more staff. Or you can recognize that there will always be too much work for existing staff and prioritize what should be done first.

Give each objective a priority of one, two, or three, with one being the highest priority. Again, refer to results from a recent customer satisfaction survey to assist in developing priorities. Estimate how much time it will most likely take to complete each objective — six months, one year, or longer.

### ***Assign activities to appropriate individuals.***

As an administrator, you should not assume responsibility for completing all tasks identified during the strategic planning process. Ask for staff and others involved in the planning process to volunteer to complete activities in which they are interested. Assign responsibility for following up on each action step to those who have either expressed interest or who have the ability or expertise needed to complete the assignment.

### ***Develop a final document.***

A strategic plan should be used to help people understand what needs to be done to improve the financial status or services offered by a particular organization. Sometimes, just the exercise of developing a strategic plan and posting it where everyone can see it can lead to changes and improvements that otherwise would not occur.

Any additional effort expended by staff, advisors, or community representatives will only serve to facilitate completion of the plan in a more expedient fashion.

### ***Modify the document for different audiences.***

Publish an overview of the strategic plan in your program brochure or annual report. Display an easy-to-read chart with priorities and assignments listed for staff and volunteers. Develop a wish list of necessary supplies and services to share with clients and community members. Have a local artist design a poster identifying important goals with appropriate graphics for display in your facility.

### ***Encourage work toward completion of the action steps.***

Make sure each individual assigned to complete a particular action step understands how to proceed.

### ***Review progress every six months and revise the plan.***

Develop a progress report and/or write a newspaper/newsletter article to highlight important accomplishments. Reviewing progress toward completion of action steps and objectives, and eventually goals, can motivate staff and volunteers to work harder to complete their assignments. Provide positive feedback to all those who made significant contributions and support those who still have work to do. Reassign existing or add new activities as appropriate.

### ***Congratulate yourself.***

You have completed the strategic planning process and have developed a long-range plan that will allow you to improve program services. Developing a strategic plan is a great way to encourage community involvement in your organization and a win-win situation for you and the children and families that you serve.