

Strategic Planning

Everyone makes plans!

Going on holiday, or papering the bathroom all require some kind of planning and a commitment to get the job done. Plans for managing an organisation in the long term involve the same kind of thinking involved in planning our day to day lives. Because planning is such a useful tool for effective management, there are tried and tested methods for making plans and putting them on paper. This Information Sheet will look at how to involve all members of your group or organisation in the process of strategic planning for the next three to five years, what planning involves and how to put together a plan setting out the goals you want to achieve and the steps you will need to take to tackle them.

What are the benefits of planning?

When it comes to planning, people often say: "We're too busy to spend time planning: there's enough to do already!" But if you are pushed for time, planning will help you use your time more effectively. Another complaint is often: "A plan is another document that will sit on a shelf that no one will read!" But if you make planning a shared activity with all members of your group or organisation, you will find the process of planning is itself constructive and offers many benefits, even if the plan doesn't become a bestseller!

Planning offers you a chance to take a look at what you are doing now, what you would like to be doing in the future and the steps you will need to take to get there. Planning can be an opportunity for everybody to take stock of what they are doing, share their ideas and experience and think about what they would like to see their organisation achieve in a few years from now. Very often we are so busy getting

things done, we lose sight of where we are heading. When was the last time you sat down with your committee and had a relaxed chat about how things were going, what was working and what wasn't without attaching blame or making any judgements? Planning gives you the chance to take a bird's eye view of your work and get some perspective on what you are doing, away from the day to day pressure of your 'to-do' lists.

Benefits of planning include:

- **Commitment to achieving results**

Good planning results in commitment to a goal. Commitment is what makes the difference between actually getting something done and thinking or talking about it. When everyone in an organisation is committed to reaching the same goal, achievements and successes that might have seemed impossible, will be within reach.

- **Escape route from procrastination**

When you know what you are working towards and you have identified what you need to do to get there it is much easier to get on with the job rather than get side tracked by the filing, making tea, sharpening the pencils...

- **Sharing the load**

If you have involved everyone in the planning process, you will be able to set out clearly what each person is responsible for, make sure nobody is overloaded or uninvolved. Planning allows you to delegate work appropriately and empower people to get things done.

- **Allocating your precious resources**

Planning will help you identify your priorities and set out what needs to be done to reach the

Passionate about events

north east
england

Strategic Planning

objectives you have set. You will be able to work out if what you want to do is going to be possible with the resources you have at your disposal, and planning will enable you to invest your resources in the areas where your efforts will have the biggest impact on your success.

- **Creating a sense of achievement**

Good planning allows you to identify goals and then work out the steps you will need to take to reach them. Achieving goals makes everyone feel good and success breeds success so you will feel encouraged and ready to meet new challenges.

How do you plan?

Planning usually involves those people who are responsible for making decisions or influencing the work of your group or organisation. This will probably be your committee, staff or management committee. However, committees can get stuck in a rut and their ideas can get stale, so it is useful to involve members or participants to add a fresh and grass-roots perspective on what you do. Beware of making the group too big, a small group of between six and ten people will work best. This allows good discussions and gives everyone a chance to have an input.

Involve everyone!

Even when you have formed a small group to be involved in the planning process, you can still involve your membership or people taking part in your work, or using your facilities. Let them know you are going to be working on a plan, ask them if they have any ideas on what they would like you to be doing and where they see the group or organisation heading. You can do this by holding a planning meeting(s) for

members or participants; don't make them too big, several small group discussions will be more constructive than one big meeting. Then use the results of the meetings in the planning process. Or, you could distribute a survey form asking people for their opinion. Make sure the form is easy to read, easy to answer, has a date by which it should be returned and a clear return address.

Take time to plan

Taking time out from the pressures of your organisations work will help you think creatively and look at what you are doing afresh. You do not need to book yourself into a posh hotel for a weekend, you could simply meet at someone's house. But you do need to get away from ringing telephones and interruptions. Planning is not a formal event, allow yourself to relax, create an informal atmosphere, wear comfortable clothes, forget about roles and responsibilities, take it in turns to take notes and keep the meeting on course. You want to create an atmosphere where everyone can make a contribution, be honest and be listened to, so try and overcome the usual pecking order and give everyone a chance to express themselves.

The process of planning

What's your vision?

The first and most essential thing to do is to agree why you exist. Perhaps this is something stated in your constitution and you don't feel you can challenge it. But times change and constitutions can be changed too, so thinking about what you do now and what you would like to be doing in the future is relevant to everyone. [See Statement of Purpose]

Passionate about events

north east
england

Strategic Planning

What do you think you should be doing in three or five years' time?

What do you think you are doing now?

Discussing these questions as a group will help you come to an agreement on what your group or organisation is about. A short sentence that sums this up is called a "mission statement" or "vision" and lets everyone know why you exist and what it is you want to achieve.

For example, A music festival's mission statement might be: "To bring world class music performers to rural England and increase audience participation in classical music".

SWOT Analysis

The next step in the process is to take a look at what your group does well, what not so well and the external environment in which it operates. This is called a SWOT analysis because it looks at your **Strengths and Weaknesses** and the **Opportunities and Threats** facing you.

Firstly consider your **strengths**; this is a chance to sing your own praises. Do you have a strong management committee? Do you have people working with you with special skills, or a particularly enthusiastic membership? Are you doing something that no-one else does, or do you do what you do better than your competitors? Do people see you as an energetic or attractive organisation? Think creatively about this (and all the stages in the SWOT), have a good dig around and don't be modest or shy (but be realistic: this is not the time for rose tinted spectacles).

Next take an honest and open view of your **weaknesses**. There may be problems with your management committee; it may take you ages to get anything done; you may always be struggling to make ends meet or have problems keeping your membership numbers up. Think about how people see you and the work you do, do you present a favourable image or are you putting some people off? Keep going until you have no more regrets or disappointments with yourselves left! This can be a useful way of letting off steam, but don't get personal or use it to criticise others: keep the discussion constructive, you are in the business of creating a better future not listing personal failures. Your strengths can be built on in the future, weaknesses are disadvantages you need to attend to and put right.

Opportunities and Threats are external factors which affect your group or organisation and the work you do. Opportunities and threats come in all shapes and sizes and are often related to your competition, the way people see you and the physical and economic environment in which you operate. Try and take a birds eye view of where you are and the factors affecting you.

Example:

- **threat:** local government reorganisation in Scotland and Wales may be a threat, as budgets have shrunk and there is more competition for the funds available
- **threat:** the local bus service has just been cut by half, making travel to and from your rehearsal space difficult in the evening
- **opportunity:** the Lottery is an opportunity for you to improve your equipment or facilities

Passionate about events

north east
england

Strategic Planning

- **opportunity:** the local authority has just made funds available for developing youth work in the community.

Often, strengths and weaknesses and opportunities and threats, can be two sides of the same coin. For example you may consider your committed membership to be a strength, as it gives you a steady and reliable income; but it could also be seen as a weakness because your members are conservative and resist change.

Goals

With all the information you have collected from the SWOT analysis and the vision you have agreed, you can now sort out your priorities. This is often the most difficult part of the planning process because it involves you in making choices. You may have lots of ideas about what you could do, but can you really do them all?

To help you decide your goals ask yourself:

- will this get us closer to our vision?
- does this play to our strengths?
- will this make the most of the opportunities and minimise the threats facing us?
- will this give us the greatest success for the efforts we will have to make?

Avoid being tempted to do the same things as you have always done simply because you have always done them. And if not doing something leaves a member of your committee without a purpose in life, don't feel you have to do it for their sake: you will have plenty to do

and shuffling roles and responsibilities may well be something you will want to take a look at anyway. Goals are major accomplishments, not tasks on a to-do list: these come later. Your goals will be affected by the resources you have available. You will probably find that half a dozen major goals will give you plenty to sink your teeth into. Choosing a few goals rather than trying to tackle everything allows you to focus your energies and work more effectively. You will also find it easier to communicate what you are doing to your members or participants as well as funders, if you are focused on a few major goals.

Reaching your goals

To achieve your goals you will have to break them down into smaller chunks. These smaller steps are your objectives and will outline your strategy for achieving your goals. Again, don't get caught up in the detail, think of them as the necessary stages in a process or the mile-posts on a journey.

Part of the process of setting your objectives will involve deciding who is responsible for what. Delegating tasks at this stage will make sure everyone knows what they are doing and why they are doing it. Be even handed with your delegation: you don't want to have someone taking on too much even if they seem terribly enthusiastic; similarly you may want to involve people in new areas of activity they may not have thought doing themselves.

When delegating responsibility for objectives, make sure you are delegating the power to get things done with the job. Giving people responsibility for a task is of little use, if they have to take every decision back to a committee before they can put it into action.

Passionate about events

north east
england

Strategic Planning

Invest them with the power they need to be effective for the task in hand. They can still be accountable to the committee, but delegating decision making power with the job allows them to be creative and effective in tackling the job. If you do this, you will find you achieve your goals more quickly and build a stronger and more committed team.

You may find you need to develop new skills to achieve the goals you have set yourself. This could mean bringing new people in, or training existing committee members or staff. Or you may need to find money to pay for activities needed to achieve your goals, or find extra help to get things done. You will need to consider these factors when you look at how you are going to pay for the plan you have drawn up: this is your business plan.

Writing the plan

A plan doesn't have to be long winded or written to impress, it is simply a document setting out what you are going to do and how you are going to do it. Don't assume the reader knows about you, tell them and don't use jargon. A good rule of thumb is to write like you speak, or write as if you were writing for your daily newspaper. There is no rule on length, it may be short or long, depending on what you have to say. The way you write the plan will depend to a certain extent on who will read it, but if you follow this basic outline you won't go far wrong.

Your plan will probably include sections on:

- your vision
- introduction
- your organisation (events' programme)
- SWOT analysis

- goals
- objectives
- resources
- recommendations
- summary

Start with your Vision or **Mission Statement**; you can simply state this at the beginning of the document, you might want to write it in bold and give it a page of its own. Then give a brief **Introduction**, saying who was involved in the planning process and how you involved as many members or participants as you could. You can also state the period the plan will cover; perhaps it is just for next year's work, or for the next three years. You may want to review the work you have been involved in recently and also say when you were formed and why. You could also list your committee members here, or give a separate list of them at the end of the document.

After your introduction, give an account of your organisation and what it does. Outline the **artistic programme**, the groups you work with and the events you take part in. Then, give the results of your **SWOT analysis**. You will probably want to edit this, if you have done a good job at the planning stage! Give your list under the headings of strengths, weaknesses, opportunities and threats, you may want to summarise what you considered to be the most important factors affecting your group or organisation.

After the SWOT state your **Goals**, then give the **Objectives** for each of your goals. You may want to list all your goals together, or take them one by one and list your objectives underneath. When you give your objectives be sure to state

Passionate about events

north east
england

Strategic Planning

who is responsible, by when you expect to complete it and how you will know when it is done.

After listing your goals and objectives you may want to have a section called **Resources** in which you identify any major resource implications, such as training for committee members, the need for equipment or facilities, or extra help from volunteers. You might also want a section called **Recommendations** for any changes to the structure of your organisation or the way it works you think are necessary for the fulfilment of your plan.

You may want to sum up the main points in a **Summary**, this is often put at the beginning of the document to give people a quick overview of what you are about. Be sure to state your name, address, contact numbers and the names and contact numbers of your officers, committee members or staff somewhere in the document, this is often the first or last page.

Putting the plan into action: sharing the vision

If you have involved everyone in the planning process you will probably find the results of your work is eagerly awaited. The work you have done can help build a strong, cohesive organisation where everybody knows what they are working towards and what their role is. Share your vision, be enthusiastic about it, you have after all worked hard to write your plan. You will need to do this to make sure it is approved by your management committee, or given the thumbs up by your committee and accepted by your members or participants. People don't like having plans imposed upon them, so if you have really involved people in the process it will be much easier to gain

approval and a sense of shared ownership of the plan. A good plan will have the agreement and approval of all those it affects and result in a shared commitment to the vision and goals you have set.

Reviewing the plan

As you work with your plan you will discover more about the way your group or organisation works, what it is good at, what presents difficulties. You can use this information when you revise your plan or go through the planning process again.

Using the plan

Once your plan is up and running you will need to check on your progress from time to time. If you have delegated all your objectives and given them a time by which they should be complete you can review the plan monthly or quarterly to see how people are doing with their projects (an operational plan). You may have to revise your plan if you have been over optimistic about how long things will take, or if unforeseen problems or projects have demanded your attention. Plans aren't set in stone: you can change them if circumstances or your priorities change.

Operational plans

You can use the information from your strategic plan to create an operational plan (or work plan) for the year. This sets out the year's work, again saying who is responsible for what and by when tasks should be completed. It is a good idea to break down the tasks contained in the year plan into tasks to be completed each quarter. You can then check on your progress and update the plan quarter by quarter. At the end of the

Passionate about events

north east
england

Strategic Planning

year it is a good idea to have an annual review, bringing together the committee or management team and members who worked on the plan to review the years work, check on progress and then add another year onto the end to bring it up to date. If you write an annual report for your organisation the review should highlight plenty of achievements you can include.

Other uses for your plan

Your plan can also be useful for more than the workings of your group or organisation. You can use it to give essential information about yourself to your funders, sponsors or local authority. Often presenting a well written and well presented plan can give you credibility, even if people don't read it. You can use your plan to support any applications you may make for funding, from the Lottery or other funding agencies.

Your business plan

Once you have written your strategic plan and set out how you are going to make it happen in your operational plan, you will need a business plan to show how you are going to pay for it! Your business plan gives the financial information needed to show how your activities will affect your cashflow and your long term budgeting. It will be an essential document to show to funders to raise more money for the work you want to do.

Further information:

VAN Briefing, Business Planning.
Voluntary Arts Network <http://www.voluntaryarts.org>

Developed with thanks to
Voluntary Arts Network www.voluntaryarts.org



Passionate about events

north east
england