# STRATEGIC PLANNING

## Fingal PPN and Blanchardstown Area Partnership

### Training Programme Autumn 2017

Quality Matters
supporting improvement in social services

Quality Matters
supporting improvement in social services

# Hello!

## I am Caroline Gardner

I'm CEO of Quality Matters

Our work involves supporting organisations with strategic planning, evaluation, training and consultancy.

# Today’s objective

To be able to know how to develop a strategic plan and avoid common pitfalls

“

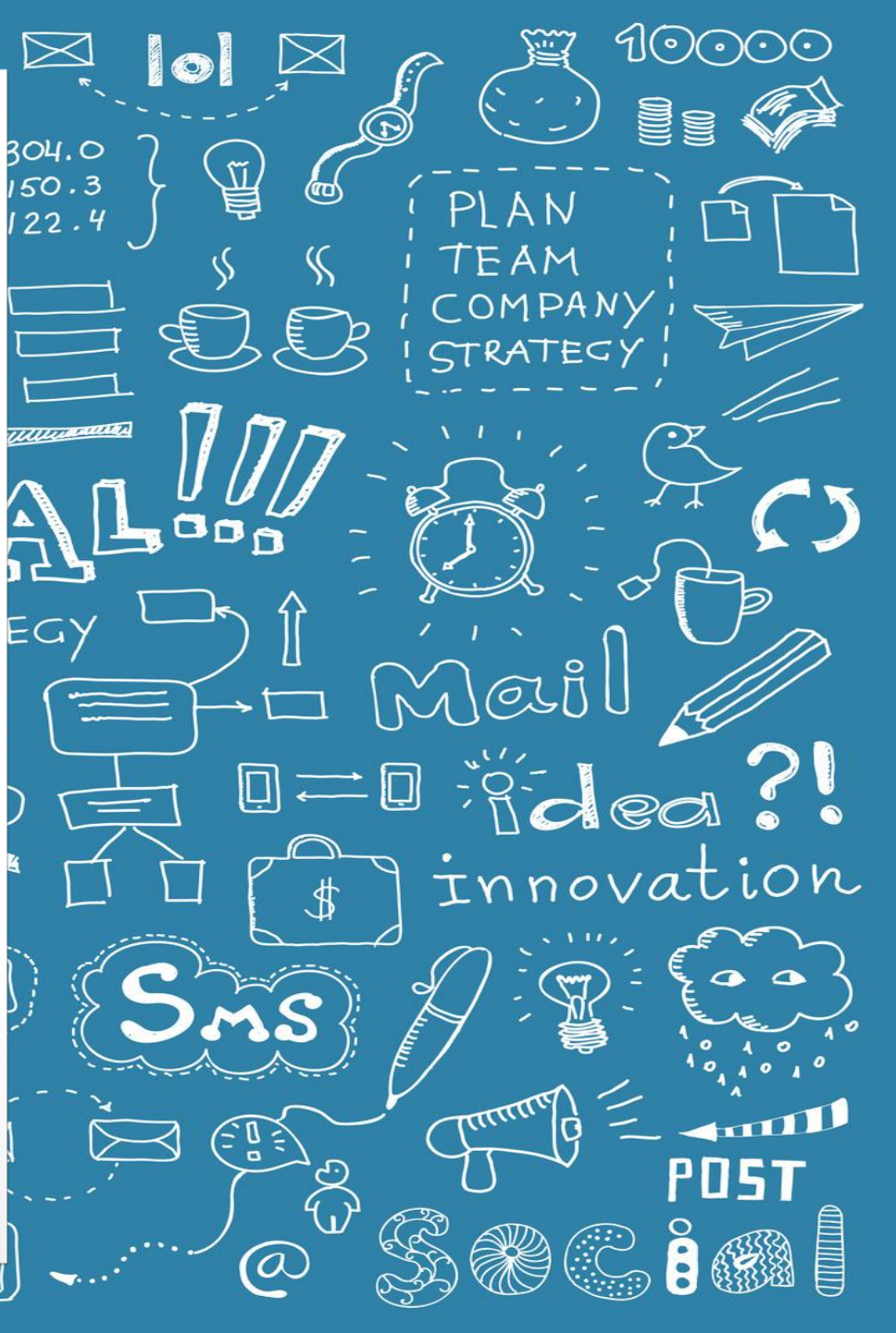
Strategic planning is a:

*‘deliberate, disciplined approach to producing fundamental decisions and actions that shape and guide what an organisation is and does and why?’ (Bryson, 2012)*

# When it goes bad….
# When it goes well….

# Common problems

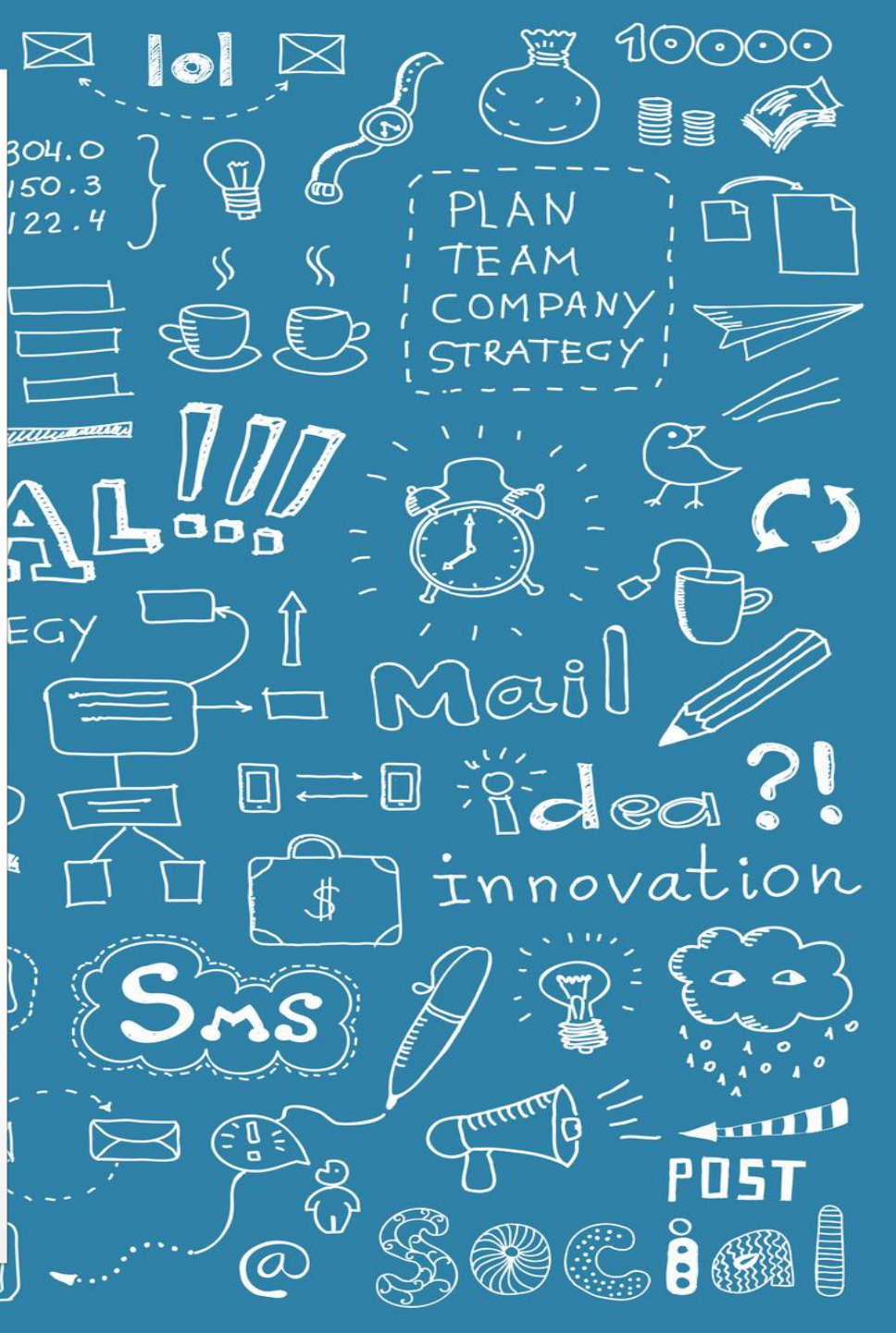
- Not enough time
- Doesn't involve staff or staff don't feel listened to
- Doesn't improve relationships and understanding with funders
- People have unrealistic expectations / relevant people don't agree
- Doesn't get finished or takes too long



# Common benefits

- Connects staff to vision
- Connects funders to vision and organisation
- Results in an agreed roadmap
- Bring s new opportunities
- Is a point of celebration
- Supports others to engage
- Is understood by everyone

**Create principles**



# Example Principles

Such as....

**We will develop analyse our situation**

**We will authentically engage staff and stakeholders**

**We will communicate it to our key audiences**

**We will ensure its realistic**

**We will clarify what success is**

# Glossary

- **Vision:** A description of an ambitious future reality, which the organisation will work towards achieving.
- **Mission:** Defines the fundamental purpose of an organisation, how it achieves and delivers on its vision.
- **Objectives/Goals /Aims:** The core ways in which the mission will be achieved.
- **Key Performance Indicators (KPI)s:** The measures that will used to determine success.
- **Values:** What are the common principles that underpin and guide how we do what we do.

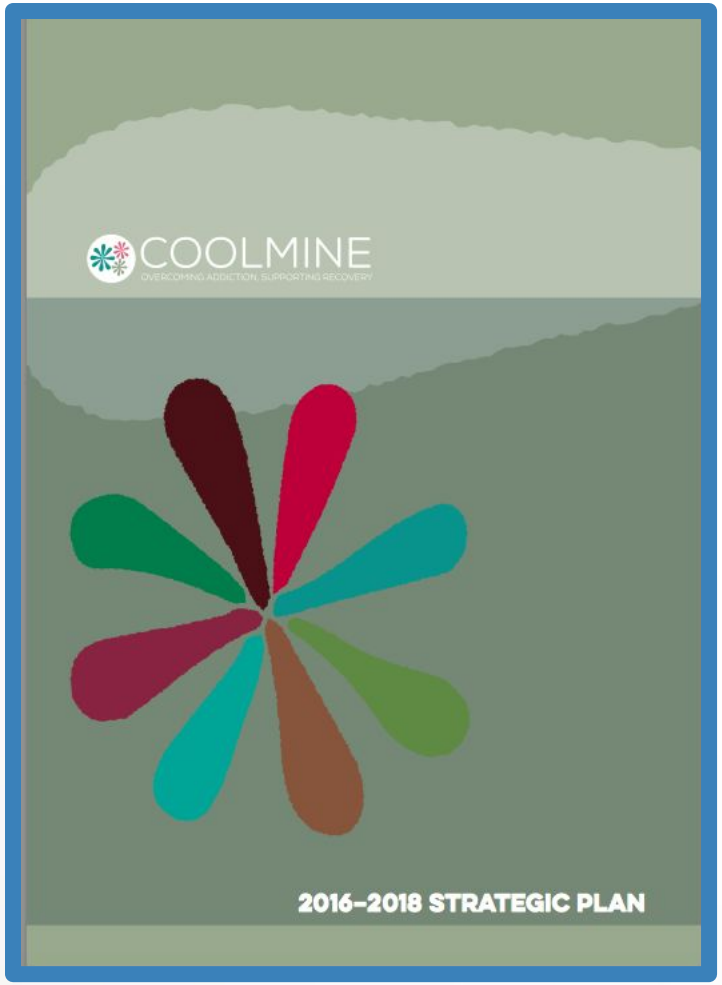
Analyze Position
Prioritize Criteria
Define Goals
Define Accountability
Review
Strategic Planning

# 10 steps to strategic planning

1. Agree Scope, methodology and resources for the plan
2. Analysis Situation
3. Review mission vision and values
4. Create strategic objectives
    a. What, when, how, who, what success (KPI)
5. Resource and reality test your plan
6. Celebrate your achievement - share your plan with stakeholders

# Agree Scope and Methodology

What is the current situation?




Examples of Strategic Plans

# Clarify Audience

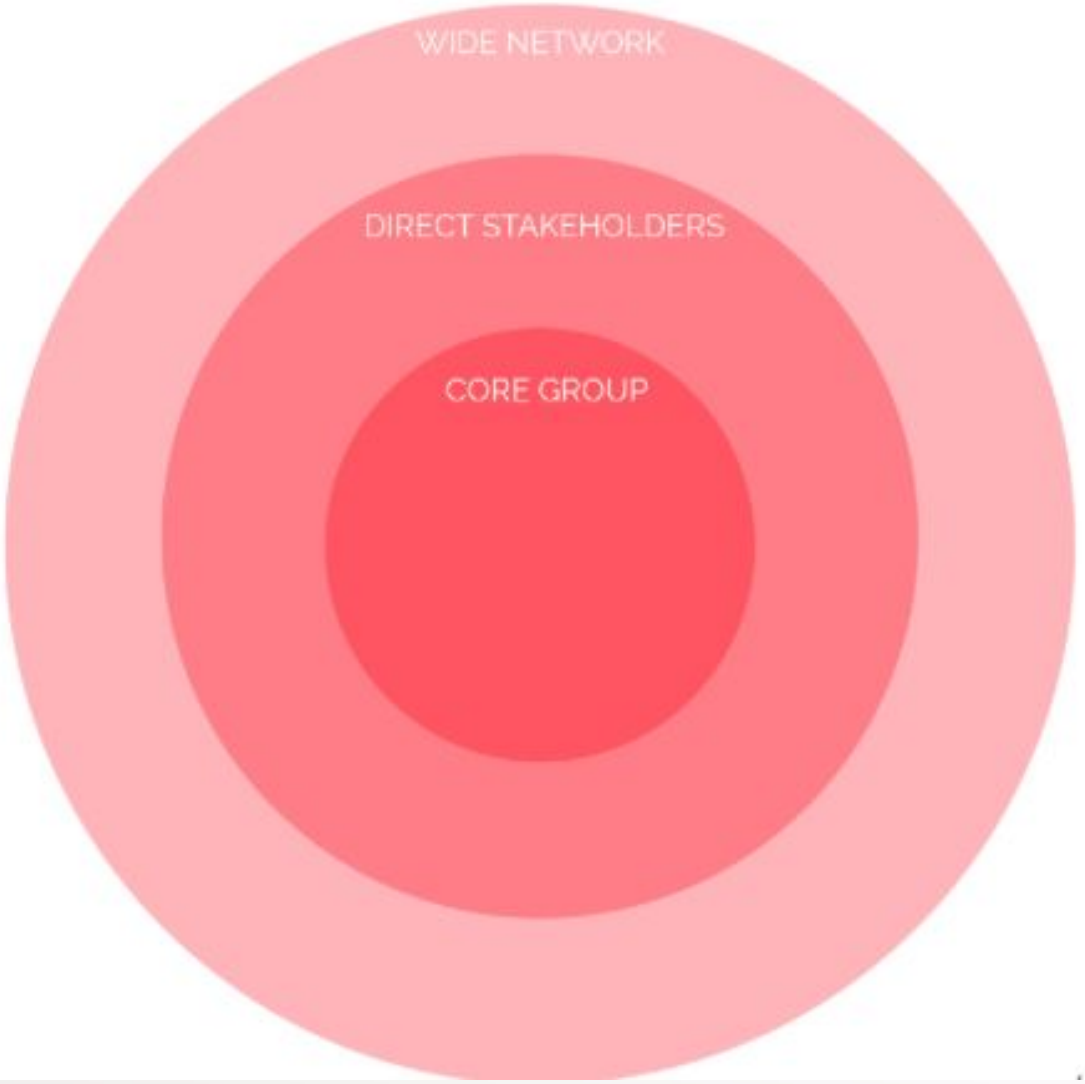
What group of people are you trying to reach with the plan?  How long do you want it to be?

5

# STAKEHOLDER MAPPING

Use in your Understanding phase to frame the problem & find the people who may be targets, champions or opponents of your design.

Lay out individuals and groups on the tiered map, to make clear who you should be targeting & who else may be affected by your design work.



# A Steering Group

- This is a of people who can guide the process, they need a term of reference:
  - Who
  - When
  - Roles
  - Boundaries
  - How do decisions get made
  - How are other stakeholders involved

## Steps

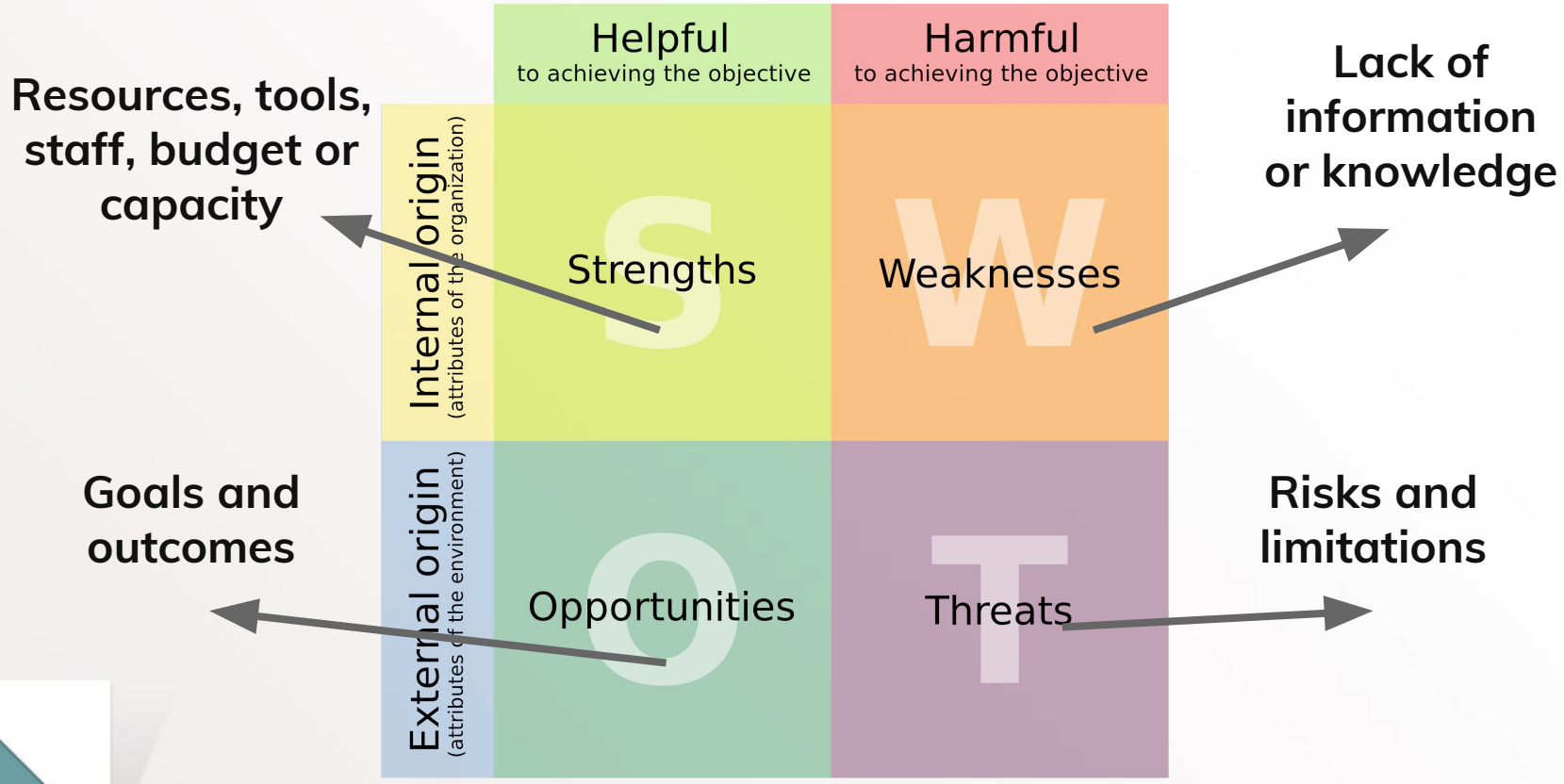
- Develop a scoping document
- Develop stakeholder map and consultation plan
- Develop a Terms of Reference for the steering group
- Develop a resourcing plan

# Analyse Situation

What is the current situation?

# Analyse Situation

## Complete a SWOT analysis



# Other material to use

Now……..5 years

# Method: One to One Interviews

Definition: Structured or unstructured one-to-one directed conversations with key individuals

Suggestions:

- Try to get someone independant
- Select the board and key funders
- Clearly explain to service users how information will be used and kept confidential.
- Use language like “tell me more” or “can you give me an example”
- Then do a thematic analysis

# Method: Focus Groups

Definition: Structured conversation with groups using standard questions and open discussion.

Suggestions:

- Include people who can provide the information that you need
- Can work best with pre-existing groups
- Carefully consider how you reach out to people to participate (i.e. tying into events, providing lunch, etc.)
- Participants that do not know the researcher are more likely to be honest.
- Create a process for analyzing data

# Method: Survey

Definition: Standard paper-and-pencil, phone and online questionnaires

Suggestions:

- Pilot test surveys to ensure clarity, fit for purpose and usability
- Ensure questions are unambiguous, comprehensible, and are not ‘double-barrelled’
- Use a mixture of open and close-ended questions
- Explore ways to increase response rates (for example, offer rewards or prizes for survey completion, or use gatekeepers to advertise survey)

## Let's improve these questions

1. How would you rate the great services provided in our adult education programme?
2. How old are you? [18-25 / 25-35 / 35-45 / 45-55 / 55-65 / 65+]
3. What is your primary concern for your children? [Drugs / crime / leave school early]
4. How do you rate the facilities in our centre? [Fairly good / Very good / Excellent]
5. Rate the following sentence; families can access our support easily and referral pathways onwards are clear.

# Tips

- Involve all stakeholders
- Be clear about what you really need to know
- Ensure someone has the time to compile the information
-

# Generate Draft Objectives

Objectives, strategic objectives or

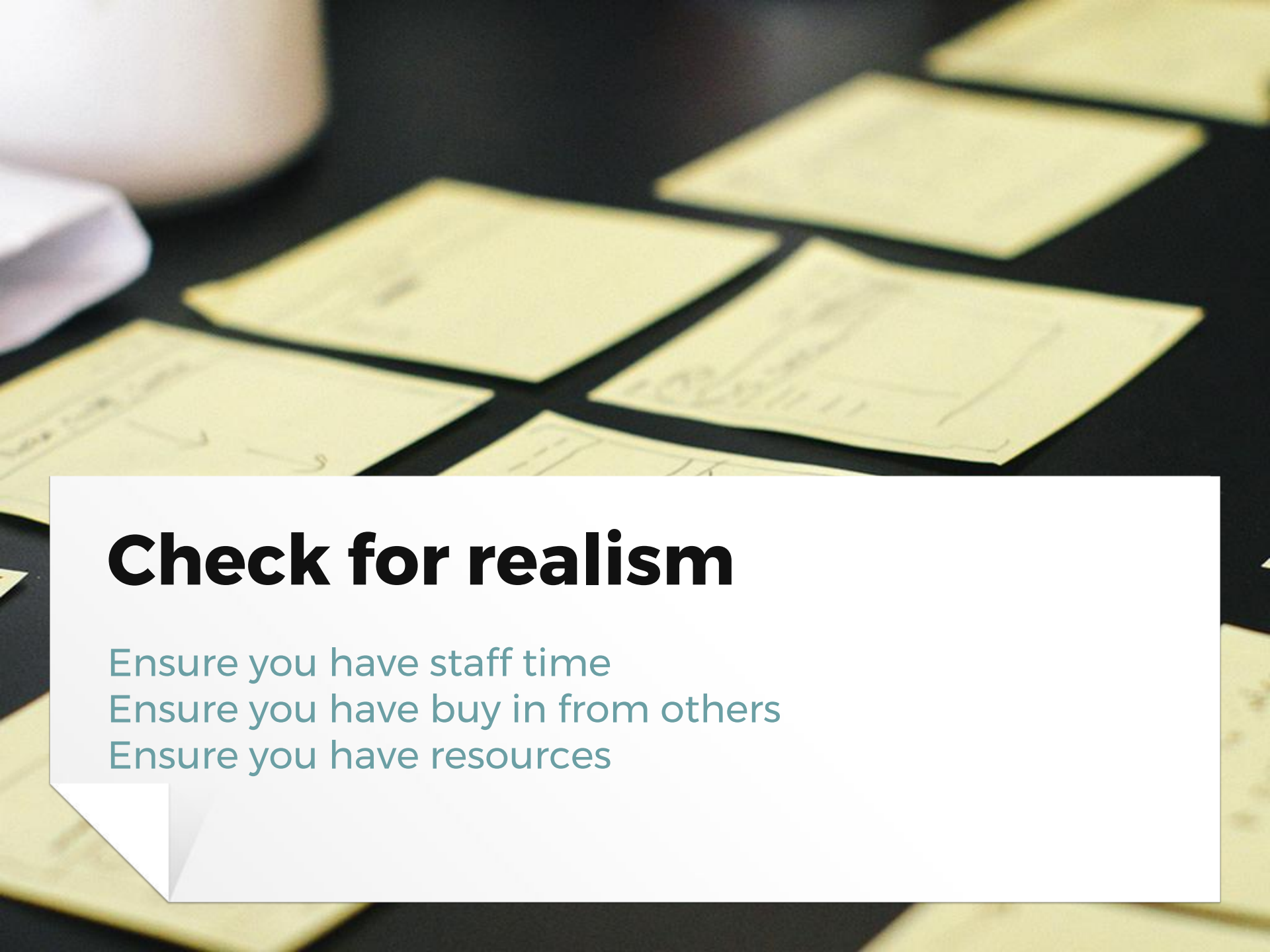
# Review the mission, vision and values

# How?

- Develop a report on the key emerging issues and suggested solutions
- Hold workshops and generate potential strategic actions
- Write it up, review and adapt, deciding:
  - What
  - Who
  - When
  - Resources
  - What is success

# Hold meetings with those who hold the resources

1. Present your case, use evidence
2. Ask for collaboration
3. Follow-up with a copy of the strategic action



# Check for realism

Ensure you have staff time
Ensure you have buy in from others
Ensure you have resources

Celebrate
NEWS
LIKE
RSS
304.0
150.3
122.4
PLAN
TEAM
COMPANY
STRATEGY
SUCCESS
Mail
idea ?!
innovation
Money
SEARCH
SMS
?!!
POST
conversation
+1
Social

*Great strategies, like great works of art or great scientific discoveries, call for technical mastery in the working out but originate in insights that are beyond the reach of conscious analysis.*

*(OHMAE cited in de Wit and Meyer, 1998: 94)*

# Thanks!

## Any questions?

**You can find me at:**

Email: caroline@qualitymatters.ie

Twitter: @qualmatters

Telephone: 01 872 0030