A Practical guide to Strategic Planning
Overview

Why Strategic Planning?

“If you don’t know where you are going, any road will take you there”

(Lewis Carroll)
Overview

Why Strategic Planning?

“If you don’t know where you are going, you will probably end up somewhere else”

(David Campbell)
Overview

Why Strategic Planning?

“If you don’t know where you are going . . . You might not get there”

(Yogi Berra)
Workshop Overview

1. What is Strategic Planning
2. Strategic Planning Framework
3. Identify Current Situation
4. SWOT/SCORE Analysis
5. Strategic Priorities
6. Goal Setting
7. Examples of Senior Centre Trends
What is Strategic Planning

- Strategic Planning is a road map to the future
- Consciously choosing to be clear about your Centre’s direction

*If you don’t change anything, the future will be no different than the past*

A strategic plan is a document that outlines steps that an organization will take to achieve an overall goal or vision
Three steps of Strategic Planning

1. Identify and evaluate current situation
2. Define the target – goals and objectives
3. Determine the path – how you will achieve the target
Strategic Planning Framework

- **Scan Environment**
- **Strategic Priorities**
- **Specific Goals**
- **Action Plan**
- **Ongoing Review**
Identify and Evaluate Current Situation

- Situational analysis is the evaluation of the current environment
- Based on data gathered from a variety of sources, a summary will be created to provide an overview of:
  - Market
  - Competition
  - Business environment
  - Internal environment
The Market

- Seniors and aging
- From “boomers” to seniors
- Spanning 40 to 50 year age range
- Impact of the new wave of “Boomers”
- Wellness revolution
- Population elements
The Competition

- Other clubs/centres
- Fitness centres
- Travel
- Volunteer activities
- Doing nothing
Business Environment

- Funding
- Government
- LHIN’s
- Local government
- Donations
Internal Environment

- Governance
- Infrastructure
- Budget/Financial Resources
- Staffing resources
SWOT Analysis

- Excellent tool for conducting a quick environmental scan
- Fits well with Strategic Planning Process
- Also a good tool to get widespread input throughout the organization

- S – Strengths
- W – Weaknesses
- O – Opportunities
- T – Threats
Swot Analysis

**Strengths**
- What advantages does your organization have?
- What do you do better than anyone else?
- What do people in your market see as your strengths?
- What is your organization’s Unique Selling Proposition (USP)

**Weaknesses**
- What could you improve?
- What should you avoid?
- What are people in your market likely to see as weaknesses?
- What factors might cause individual’s not to come to your Centre
Swot Analysis

**Opportunities**
- What good opportunities can you spot?
- What interesting trends are you aware of?
- What grants or funding are available?
- What new programs or services can you provide?

**Threats**
- What obstacles do you face?
- What are your competitors doing?
- Are things changing in the senior centre environment?
- Could any of your weaknesses seriously threaten your business?
SCORE Analysis

- An alternative to SWOT analysis

- S - Strengths
- C - Challenges
- O - Opportunities
- R - Risks
- E - Expectations
SCORE Analysis

- Strengths
- Challenges
- Expectations
- Risks
- Opportunities
Group Exercise

- Develop a SCORE analysis based on your own centre
- Include 2 or 3 examples from each category
Developing a Strategic Priority

- From the environmental scan develop a list of key strategic priorities
- Usually a manageable list of 3 to 5 priorities
- Must be measurable strategies
- Examples
  - To increase the overall membership size by 25%
  - To build a 3 months operating reserve over 2 years
  - To attract 10% younger members to the centre over 3 years
Develop Specific Goals

- After the specific strategic priorities have been developed (3 to 5) it is necessary to develop specific goals under each priority.
- Usually from 1 to 3 goals
- These goals should be developed after the strategic priorities are identified.
- Should be an inclusive process between governance and leadership.
Example: Specific Goals

- **Strategic Priority:**
  
  *To Increase Membership in the Centre by 25%*

- **Specific Goals:**
  1. To implement a comprehensive marketing plan to attract new members
  2. To add 10 new programs to attract new members
  3. To implement evening and weekend programs
Example: Specific Goals

- Strategic Priority:
  To build a 3 months operating reserve over 2 years

- Specific Goals:
  1. To implement a fund raising program including direct mail, corporate sponsors and special events
  2. To reduce facility expenses by 5%
  3. To obtain new grants worth $50,000 per year
More Detailed Approach

Strategic Priorities
- Develop operating reserves

Specific Goals
- Develop a fund raising plan

Specific Objectives
- Direct mail
- Corporate sponsorship
- Special events
### OACAO Business Plan Goals and Objectives

**Strategic Priority # 1: Within 3 years, achieve financial stability through a balance budget**

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<thead>
<tr>
<th>Goal</th>
<th>Objectives</th>
<th>Timeframe/Who</th>
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<tbody>
<tr>
<td>Increase membership revenue</td>
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<td>Increase revenue through business partnership program</td>
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<td>Obtain new government grants</td>
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<td>Develop a 3 year financial forecast</td>
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Group Exercise: Strategic Priorities

- Develop one strategic priority from the SWOT Analysis
- Develop 2 to 3 goals to meet the strategic priority
- For one goal, develop 2 to 3 objectives
- Select a reporter
- Report back to the group
### Strategic Priorities Worksheet

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<thead>
<tr>
<th>Strategic Priority:</th>
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Final Thoughts on Strategic Priorities

- Tie in with organizational strategic priorities
- Review strategic priorities on an on-going basis and determine if there are any new goals and objectives
### Sample Strategic Priorities

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<tr>
<td>A range of quality, responsive and accessible services and care.</td>
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<td>Skilled and effective staff, volunteers and board members.</td>
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<tr>
<td>A fiscally responsible organization.</td>
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<tr>
<td>An informed and responsive community contributing volunteer and fiscal resources.</td>
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<td>Stakeholder engagement</td>
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