



Creating a Framework for Organizational Success:

Strategic Planning

Welcome to HAC's webcast!

The webcast, sound, and recording will begin at 12:00 pm EST.

Due to the number of participants, questions can only be accepted via the internet. Please click on "Ask a Question" at any time during the webcast.

Creating a Framework for Organizational Success:
Strategic Planning



Presented by the
Housing Assistance Council

Rural Homelessness Capacity Building Initiative



Housing Assistance Council

Building Rural Communities since 1971

- ❑ Established in 1971
- ❑ National nonprofit organization
- ❑ Created to increase the availability of decent and affordable housing for low-income people in rural areas throughout the U.S.
- ❑ Provide services to local, state, and national organizations



Housing Assistance Council

Office Locations

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Rural Homelessness Capacity Building

The Housing Assistance Council (HAC), in partnership with the National Alliance to End Homelessness, has created the Rural Homelessness Capacity Building initiative to provide rural homeless organizations with the technical assistance, training, information, and financial resources they need to improve their ability to serve homeless populations.



Training Agenda

- What is Strategic Planning?
- When to Undertake Strategic Planning
- Who Should be Involved in Strategic Planning
- Basic Steps of Strategic Planning
- Plan Presentation



What is Strategic Planning?

Strategic planning is an essential process in preparing to carry out your organization's mission. An effective strategic planning process provides a framework to make decisions on how to allocate organizational resources, address challenges and take advantage of opportunities that arise along the way.

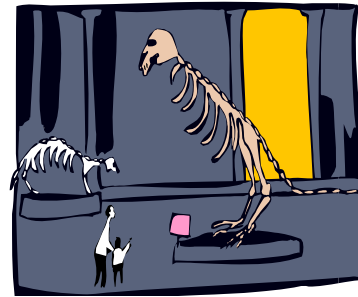


When to Undertake Strategic Planning

- When your organization is in the early stages of formation
- When considering major shifts in programs or services
- If the organization has experienced growth
- It's been along time since the last strategic plan was completed

Discuss & Review the History of the Organization

- ❑ Describe major events leading to the creation of the organization
- ❑ Individuals who played significant roles
- ❑ Victories
- ❑ Accomplishments
- ❑ Funding Sources
- ❑ Supporters
- ❑ Organization's focus at various times



Who should be involved in Strategic Planning

- Board of Directors
- Executive Director
- Staff

May want to include:

- Consultant
- Clients
- Experts in the field



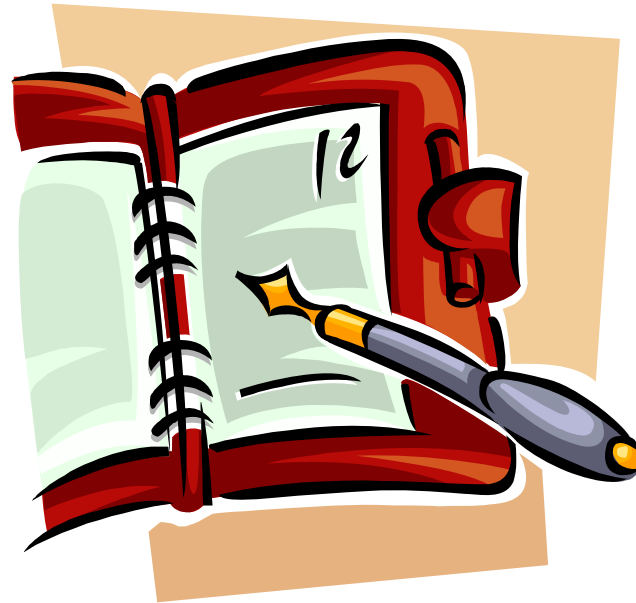
Basic Steps of Strategic Planning

- Prepare to Plan
- Define and Review Organizational Vision, Mission, Activities and Values
- Do an Environmental Scan or SWOT Analysis
- Identify Strategic Issues
- Develop Strategic Goals and Objectives
- Create Implementation Plans to Achieve Goals and Carry Out Objectives
- Monitor and Evaluate Periodically and Adjust if Necessary

Basic Steps of Strategic Planning

Prepare to Plan

- Schedule
- Objectives
- Planning Roles



Basic Steps of Strategic Planning

Define Vision, Mission, Activities and Values

Vision

Your vision statement is a one-sentence statement that answers the questions, "If the mission is successfully met, how will the community be changed or affected? What kind of community will exist?"

Mission

Your organization's mission statement should be a one- or two-sentence statement that answers the question, "How will the organization's clients be changed because of our work?"

Values

A statement of values describes an organizations' underlying beliefs that shape and give the reason for the mission, vision and activities.

Activities

A statement which describes the business or general activities you will use to achieve the organization's mission.

Basic Steps of Strategic Planning

Vision Statement

- As a result of the work of the organization, how will the community or the lives of the organization's constituent's be changed?
- What will the community look like? How will its members interact?
- How will the organization be perceived in the community? What will be its image? When people describe the organization, what terms will they use?

Basic Steps of Strategic Planning

Vision Statement

Your vision will serve as the overall goal for which strategies will be developed to achieve.

Sample

Create a community in which residents are housed in safe and quality housing regardless of household income.

Basic Steps of Strategic Planning

Mission Statement

- What will the organization do to accomplish the vision?
- What types of services or products will the organization provide (housing counseling, housing construction and rehabilitation, economic development services, etc...)
- Who will be the primary beneficiaries of these activities?

Basic Steps of Strategic Planning

Mission Statement

HAC's

To improve housing conditions for the rural poor, with an emphasis on the poorest of the poor in the most rural places.

Sample

Increase the amount of affordable housing and homeownership opportunities in Stanberry, Missouri and help those residents achieve better lives.

Basic Steps of Strategic Planning

Activities

The activities of the organization, which describe what your organization will do to achieve its mission, should be summarized in one sentence.

Sample

Develop affordable housing and other services, such as child care and health care, and help residents access our services.

Basic Steps of Strategic Planning

Values

- Why is it important for this organization to carry out its activities?
- In all of the organization's activities, what should be the underlying principles that cannot be compromised?



Basic Steps of Strategic Planning

Values

Sample

Neighborhood residents must be involved in key decisions affecting their lives.

Basic Steps of Strategic Planning

Vision, Mission, Activities and Values

In many organizations the vision, mission, activities and values statements are integrated into one comprehensive “mission statement”. Other organizations use a combination of two statements. If you decide to have one statement, it is important that all the elements of mission, vision, activities and values are included. It is equally important that this statement be clearly written and kept short and direct, since your mission statement is listed in most of your publications and proposals.

Basic Steps of Strategic Planning

Environmental Scan or SWOT Analysis

(Strengths, Weaknesses, Opportunities & Threats)

- Administrative policies and procedures
- Composition, capacity and performance of board of directors
- Staff Capacity
- Fund-raising capacity
- Financial Status
- Financial management systems
- Volunteer resources
- Facilities
- Program performance and effectiveness
- Public image

Basic Steps of Strategic Planning

Environmental Scan or SWOT Analysis

- Clients and constituents
- Community leaders
- Private and public funding sources
- Legislators, government officials and government agencies at the federal, state, county and local level
- Local and regional planning agencies
- Research departments of local universities
- Local organizations engaged in similar activities
- Advocacy or public interest groups focusing on related issues
- Neighborhood institutions
- Other key stakeholders

Identify & Prioritize Strategic Issues

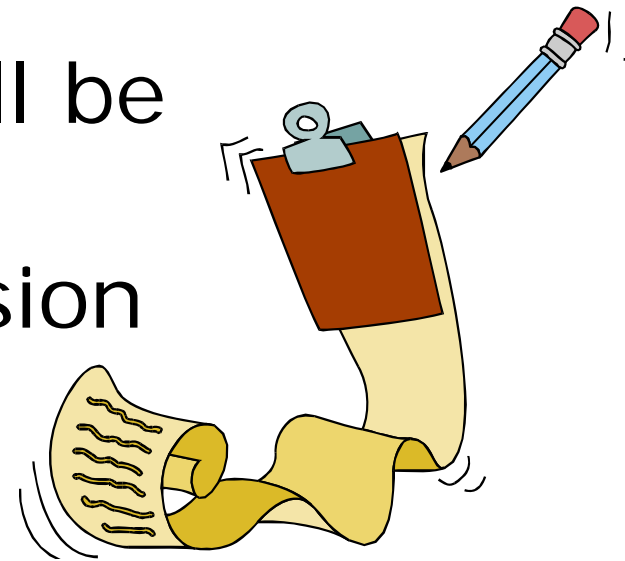
To select strategic issues, the board should look at the estimated cost of not dealing with identified strategic issues in terms of financial resources or loss of public credibility and the ability of the organization to successfully deal with each.



Basic Steps of Strategic Planning

Identify Strategic Issues

- Choose no more than five
- Select issues that you can affect
- Donor interests are relevant, but not over-riding
- Each external issue will be mirrored internally
- Come back to the mission



Basic Steps of Strategic Planning

Develop Strategic Goals and Objectives

Example

A community development organization identifies the low home-ownership rate among area residents as a strategic issue preventing it from achieving its vision of a vibrant, functioning and healthy community. *Its strategic goal?*

To increase the home-ownership rate among low-and moderate-income residents in the neighborhood

The strategic objectives for the next fiscal year related to this goal might be:

1. Enroll 50 families in home-ownership preparation classes.
2. Rehabilitate 15 vacant dwellings for sale to low- and moderate-income households.
3. Construct 5 new homes and sell them to low-and moderate-income buyers.

Basic Steps of Strategic Planning

Establish an Implementation and Monitoring Schedule

- Parties responsible for completing tasks
- Timetable for completion
- Resources required to achieve the objective



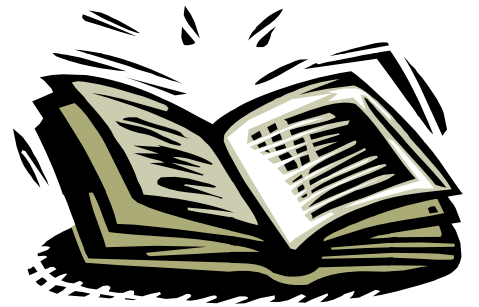
Basic Steps of Strategic Planning

Establish an Implementation and Monitoring Schedule

1. Are goals and objectives being achieved or not?
2. Will the goals be achieved according to the timelines specified in the plan?
3. Should the deadlines for completion be changed?
4. Do personnel have adequate resources to achieve the goals?
5. Are the goals and objectives still realistic?
6. Should priorities be changed to put more focus on achieving the goals?
7. Should the goals be changed?
8. What can be learned from our monitoring and evaluation in order to improve future planning activities?

Plan Presentation

- Cover Page
- Executive Summary
- Table of Contents
- Attachments



- A Note About Celebration



Useful Websites

- compasspoint.org
- endhomelessness.org
- enterprisecommunity.org
- idealist.org
- lisc.org
- mapnp.nonprofitoffice.com



www.ruralhome.org