Strategic Planning – When?

- Growth or transformation
- Change of Leadership
- Change in organizational direction
- New business model
- Resource allocation framework
- Need for focus
- Align board, staff, and external stakeholders
Strategic Planning – Why?

- Clarify Vision throughout the organization
- Gain consensus, ownership, and focus
- Provide a framework for alignment
- Evaluate initiatives & projects
- Drive resource allocation and capital needs
- Integrate strategic management & decision-making
- Balance today’s needs and tomorrow’s wants
Strategic Planning – Who?

- Executive Director
- Key Board Members
- Management Team/Staff
- Dedicated Champion/Leader
- External Stakeholders
- Customers/Clients
- Program Lead and/or Team
Strategic Planning – How? The Balanced Scorecard
Vision: Citi Performing Arts Center boldly redefines the role of a performing arts center by creating new organizational models and partnerships to support broad-based access to the performing arts and arts education. As a performing arts and education integrator and leader, Citi Performing Arts Center gains national recognition and substantially increases the organization’s funding base and audience reach.

Customer: To achieve our vision, how should we appear to our customers?

Internal Process: To satisfy our customers, which processes & programs must we excel at?

Learning & Growth: How will we sustain our ability to change and improve?

Financial: To financially sustain our mission, what must we focus on?
1-2-3 Easy Steps to Simple Strategic Planning

THE PLAN

1) Identify 2+ key Stakeholders

2) Identify 2+ top level Objectives in the following areas
   • Customers: Providing customer value
   • Internal Processes: Delivering program impact
   • Learning/Growth: Building capacity and resources
   • Financial: Sustaining a financial foundation

3) Create a 1-page visual or Strategy Map
1-2-3 Easy Steps to Simple Strategic Planning

THE DASHBOARD

1) Identify 5-10 Key **Objectives** and assign a **Goal** to each

2) Assign a **Metric** (or more than one) to each goal that will symbolize success
   - % change or increase/decrease
   - Numerical benchmarks (#’s, $)
   - Dates: Launch of a pilot or initiative; completion of a phase
   - Renewals vs. new; in-kind vs. cash, survey responses (Survey Monkey), etc.

3) Create a 1-page **Dashboard** (word table, excel, chart)
1-2-3 Easy Steps to Simple Strategic Planning

**EVALUATION**

1) **Review** Dashboard 2-4x/year with color codes (red, green, yellow, blue)

2) Annually **evaluate** success/challenges/changes and think about context; what impacted outcomes?

3) **Update** Dashboard
   - Change/update/repeat goals
   - Change/update /repeat metrics