The Future is in YOUR Hands! Strategic Planning for the 21st Century Board
A Presentation for the PA-DEL Valley CAI Educational Event

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“Which road do I take, she asked?”
“Where do you want to go?” responded the Cheshire Cat.
“I don’t know,” Alice answered.
“Then,” said the cat, “it doesn’t matter!”

“The primary benefit of the planning process is the process itself, not the plan.”

George A Steiner
Think about these:

• Do they understand their association’s legal structure?

• Do they understand their association’s financial condition?

• Do they understand the resources they have available?

• What is really important to their members?

• What are the current conditions within the community?

Strategic Planning answers the big questions

1. Where are we?
2. Where do we want to be in the future?
3. What part of the status quo do we need to change to get us where we want to be in the future?
4. How do we make it happen?
Why do strategic planning?

- Stimulates ingenuity & new approaches
- Increases everyone's investment in the organization
- Develops a common vision
- Clarifies values & beliefs
- Anticipates opportunities & obstacles
- Provides a framework for day-to-day decisions
- Answers stakeholders questions
- Develops a blueprint for growth
- Gives you the ability to say no to new ideas that don’t fit (at this time) and to focus on those actions and programs that drive you toward your goals

*CAI Research Foundation 2013

Major Reason for Strategic Planning

There is an expectation from homeowners that well run community associations have at least, a 3-5 year strategic plan.

*CAI Research Foundation 2013
A strategic plan is a tool that provides guidance in fulfilling a mission with maximum efficiency and impact.

An operating plan is a coordinated set of tasks for carrying out the goals delineated in a strategic plan.

A business plan focuses on the actions and investment necessary to generate income from a specific program or service.
The Strategic Planning Process

Phase I

- Write or Revisit Mission Statement
- Draft a Vision Statement
- Identify Organizational Values
Mission Statement
Your *raison d’être*

- A mission statement is a brief expression of your organization’s purpose.

- It answers the question – “Why do we exist?” and “What, at the most basic level do we do?”

- Summarizes the What, How and Why of your organization’s work.

Vision Statement

A description of your desired future state.

- An organizational vision statement is internally focused: It projects the future in terms of the association operations fulfilling needs and, answering the question “where do we want to be?”

- A societal vision articulates the desired influence of your work on your target community or constituency. This type of vision statement answers the question “What is the impact of our work?”
Your vision is a dream with a deadline.

Vision vs. Mission

Your organization's vision is all about what is possible, all about that potential. The mission is what it takes to make that vision come true.

Your “mission gap” is the motivator to move your organization forward.
Characteristics of strong Vision Statements

- Imaginable – conveys a picture of what the future will look like.
- Desirable - something the member’s embrace
- Feasible – comprises realistic, attainable goals
- Focused – clear enough to effect decision making.
- Flexible – allows individual initiative
- Communicable – easy to understand & communicate

Why is a Vision Important?

Shape your future, or someone else will!
Mission – Let’s try this out!

**Mission Statement**

**Tips**
- Convey your organization’s **values**
- Inspire and motivate your organization toward **objectives**, which are fundamental to the image you wish to establish
- Use **long-lasting ideals**, not fashionable statements
- Keep your statements **clear** and easy to understand
- Consider the organization’s **products, services, markets, values and concern for public image**

Further, if your goal is to create the future of your community then you will want to ensure your work reflects the values you want to see in your community.

Values – The Talk you want to Walk

The principles on which your organization are built, and that guides its planning, operations and programs. It answers the question “What do we believe in?”
Our Organizational Values in Action!

Integrity ☑ Inclusiveness ☑ Reliability ☑ Quality ☑ Respect ☑ Dedication ☑ Honor ☑ Ethical Behavior

The Strategic Planning Process
Phase II
Assessing The Environment with SWOT

<table>
<thead>
<tr>
<th>Internal Strengths [List here] anything you can think of that makes your organization amazing! What can you rely on to deliver your services?</th>
<th>Internal Weaknesses [List here] what isn’t quite the way it should be yet? What is missing?</th>
</tr>
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<tbody>
<tr>
<td>External Opportunities [List here] any potential opportunities to really push your process forward.</td>
<td>External Threats List here anything that might get in your way of achieving your goals.</td>
</tr>
<tr>
<td>SWOT Interplay</td>
<td>Opportunities</td>
</tr>
<tr>
<td>----------------</td>
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<tr>
<td>Strengths</td>
<td>INVEST - Clear matches of strengths &amp; opportunities through which you can leverage your strengths to take advantage of opportunities.</td>
</tr>
<tr>
<td>Weaknesses</td>
<td>DECIDE - Opportunities matched with weaknesses require you to make a judgment call – Invest, Divest, Collaborate</td>
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Adapted from Comparative Advantage to Damage Control. Kevin Kearns

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Why are SWOT & SWOT Interplay Important?

The time and energy you spend on your SWOT & SWOT Interplay will be paid back ten-fold when you develop your Communications Plan.
The Strategic Planning Process

Phase III

- Identify Future Core Priorities
- Create Goals to fulfill Priorities
- Define Strategies to reach Goals

Sample Strategic Goals

- Process Goals
- Board Operational Goals
- Management Operations Goals
- Building awareness Goals
- Resource development Goals
A goal is a broad primary outcome.

A strategy is the approach you take to achieve a goal.

An objective is a measurable step you take to achieve a strategy.

A tactic is a tool you use in pursuing an objective associated with a strategy.
### Management Strategic Goals

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<tr>
<th>Goal</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3+</th>
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</table>
| Build Greater Depth in Board  
- Increase # board members ???  
- Develop Roles & Responsibilities  
- Board training – critical! | | | |
| Succession Planning – Board President  
- Develop Written Plan – to find the new you  
- Identify prospects  
- Develop effective committees | | | |
| Hire Professional Staff  
- They can partner with you for success  
- Evaluate the depth of the knowledge they have  
- Establish performance benchmarks for both of you | | | |

### Build Awareness – Strategic Communications

- Let your mission ground you & provide focus as you develop ways to tell your story.
- Know the what and why of what you want to accomplish.
- Examine where you are and where you want to go. What do you already have going for you? What challenges must you overcome?
- Create overall communications messages & supplementary messages for each goal to be achieved.
- Stay on message.
Strategic Planning & Communications Plan

In today’s marketplace, no community organization can be effective without a communications plan. The plan provides needed structure and information for addressing critical issues that affect the organization today. It also provides a structure for adapting communications initiatives to the future.

Think Social media, awareness, need – your audience and others

We live in a connected culture

DON’T FORGET...
Integrate your mix...
...don’t die solo in the silo. Integrate your efforts!

Questions? Observations?

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2/20/2018
Thank you!

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Please contact me with any questions, suggestions or ideas!

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