

Common Strategic Planning Steps

Before, During and Immediately After Initial Meeting

I. Preparation for successful planning

(Note: This is a key step in clarifying participants' expectations and responsibilities upfront, and can help avoid potential pitfalls later in the process).

- a. Determine why, and for whom station is planning.
- b. Identify length of time for which station is planning, *e.g.* three years.
- c. Identify beginning, ending and key meeting dates for the planning process.
- d. Determine who will be involved in developing the plan on both an on-going and as-needed basis. Secure their agreement for full participation through the implementation phase. (Having a President/GM and Board Chair who champion the process is critical to the ultimate success of the plan, as is broad engagement of staff and key stakeholders at appropriate points.)
- e. Determine if an outside facilitator is needed to help design and guide the planning process and major planning meetings.
- f. Identify information needed to make informed decisions and who is responsible for collecting it, *e.g.* competitive data, community input, financial and demographic trends, trends on key station metrics, technological updates.
- g. Identify any issues that are "off the table" and not up for review and discussion. And just as importantly, identify any mandates from the license-holder and issues that *must* be addressed.
- h. Identify lessons learned from any previous planning efforts.
- i. Determine whether there are financial or organizational crises that would make it difficult to focus on and implement a strategic plan at this time.
- j. Agree on the level of detail and basic format of the final product. *E.g.* 5-10 page strategic plan for sharing with external stakeholders (with detailed one-year action plan for internal use only.)
- k. Confirm with key players that based on answers to the steps above, the station is ready for Strategic Planning.

Before Strategic Planning Retreat

II. Imagine and Articulate the Big Picture

- a. Develop, reaffirm or revise your station's vision, mission and values statements to provide a framework for the planning efforts and strategic plan.

III. Assess the Environment

- a. Identify key external industry trends and competitive issues, as well as changing community demographics and issues that will affect station operations.
- b. Identify key internal station (and license-holder) trends and issues including financial, organizational, programming and services, technical.
- c. Identify the station's strengths, weaknesses, opportunities and threats, and the implications and interplay of these given the environmental trends.
- d. Gather community input on the station's current effectiveness, impact and ideas for the future.

- e. Determine whether any additional information or data needs to be collected (see l.e. above.)

Before and During Strategic Planning Retreat

IV. Identify the Critical Few

- a. President/GM and Senior Staff (or planning committee) identify a list of “critical few” issues the station might address in the strategic plan.
- b. During retreat, agree on the “critical few” issues the station must address in the strategic plan.
- c. Identify what the station wants to achieve in the “critical few”, by when and how success will be measured.

After Strategic Planning Retreat

V. Write the Strategic Plan

- a. Draft and revise the plan based on previously agreed criteria, review processes and discussions on who has the final word.
- b. Develop a multi-year budget that helps insure station will achieve the “Critical Few”.
- c. Agree upon criteria for future modifications and updates to the plan.
- d. Formally approve plan and budget.

VI. Write a One-Year Action Plan

- a. Develop a one-year action plan, which links to and supports the strategic plan. Specify who is responsible for what, by when, and how success will be measured. This is typically done by the department or group of people responsible for achieving the action plan.
- b. Develop a one-year budget to support the Action Plan and strategic plan.

During and After Follow-up Visit

VII. Implement Plans

- a. Revise work objectives, job descriptions and/or the organizational charts to support the Action and Strategic Plans.
- b. Evaluate the Strategic Planning process noting changes to be made next time.
- c. Communicate the strategic plan to stakeholders, as appropriate. (*E.g.* Ensure staff and board members are given copies of the plan and that *future* staff and board receive copies when they are going through a station orientation.) If there is a change in the station’s vision or mission statements, a broader communication of this change to stakeholders is usually appropriate.
- d. Determine and implement regular monitoring mechanisms to ensure Strategic and Action plans are achieved. This can be integrated into regularly scheduled staff and board meetings.
- e. Determine practices for, and schedule, annual Action Plan updates and periodic revisions to the strategic plan.