

*Serving small and mid-sized tax exempt organizations
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Simplified Strategic Planning

K. Scott Abrams, CPA, CGMA

Past Chair – Crime Stoppers USA

Treasurer – Crime Stoppers International

Vice President – Milwaukee Crime Stoppers

Agenda

- ① Define strategic planning
- ① Overview simplified strategic planning process
- ① Strategic planning exercise
- ① Questions

Strategic Planning...

- An organizational process of defining its strategy, direction or making decisions on allocating its limited resources pursuing strategies.

Strategic Planning...

- How many programs have developed a strategic plan for their Crime Stoppers program or in their business?

Strategic Planning...

◎ 3 Key Questions

- What do we do?
- For whom do we do it?
- How do we excel?

Strategic Planning...

- Framework for determining organizational direction for a 3 – 5 year period of time

Planning Process

- ◎ Simple method:
- ◎ **Situation:** Evaluate current situation
- ◎ **Target:** Define goals and/or objectives as target
- ◎ **Path:** Outline a path on accomplishing goals

Current Situation...



Planning Process: Situation

◎ Vision Statement

- What does the organization want to be?
- Long term view
- Source of inspiration
- Descriptive picture of future state

Planning Process: Situation

◎ Mission Statement

- Fundamental purpose of organization
- Describe why the organization exists
- A means in which to achieve vision

Planning Process: Situation

◎ S.W.O.T. Analysis

- Strengths
- Weaknesses
- Opportunities
- Threats

Planning Process: Situation

- Analyze internal strategic factors relating to strengths and weaknesses of the organization

Planning Process: Situation

- Evaluate external factors beyond the control of the organization in opportunities and threats that may affect future operations

Target...



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Planning Process: Target

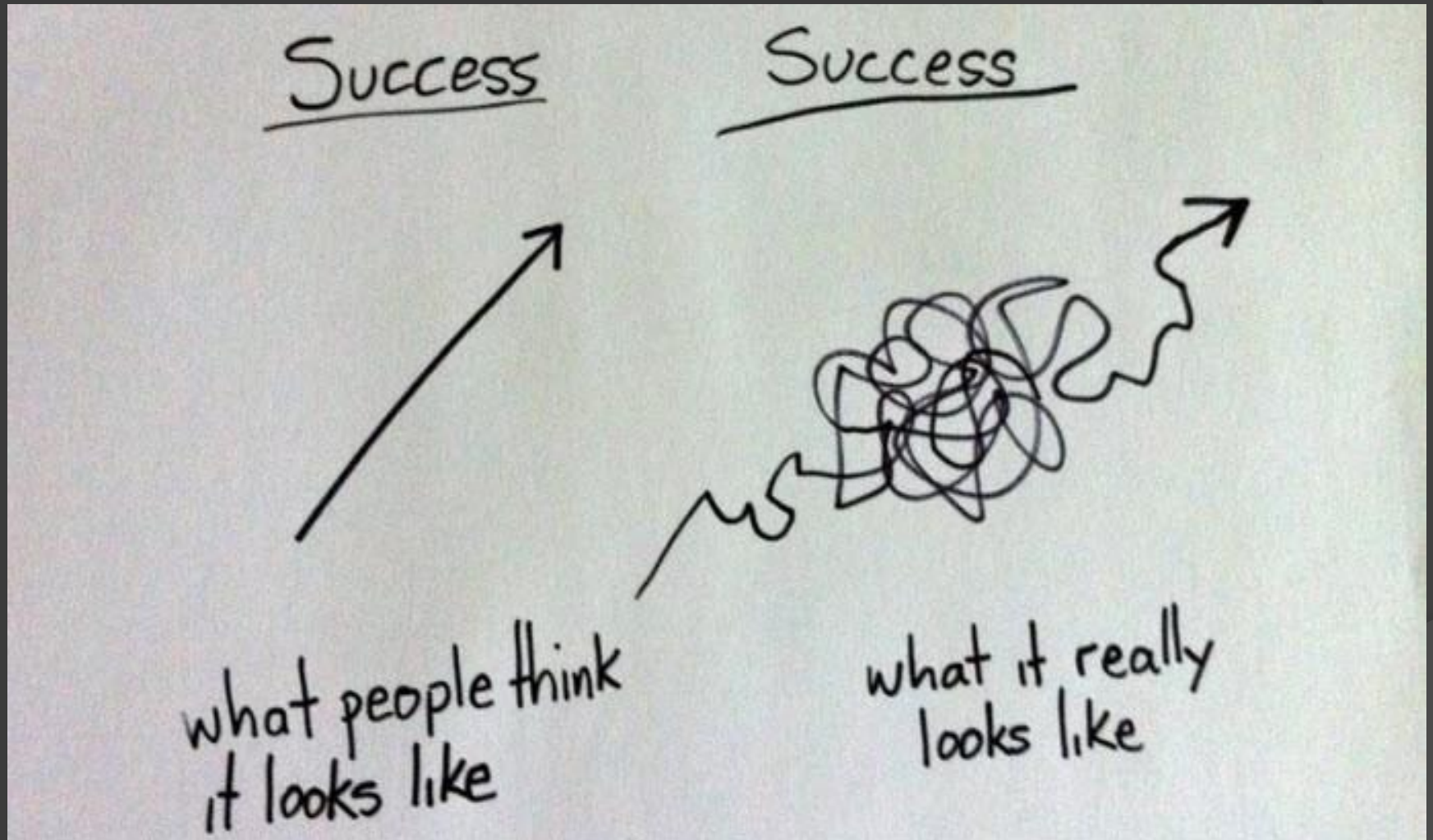
- Assimilate from the S.W.O.T. analysis areas for improvement, growth, increased focus or continued existence

Planning Process: Target

◎ Goals/Objectives:

- Specific, time bound statements of intended future results
- General and continuing statements of intended future results

Path to Success...



Planning Process: Path

- Outline or steps to accomplish goal
- Action plan or itemized list
- Time/deadlines established
- Determine accountable committees/individuals

Practical Application - Exercise

- Conduct and create a quick simple strategic plan

Planning Process: Situation

- Vision and Mission statements
- Provided for this exercise

Planning Process: Situation

- **Vision:** Crime Stoppers will strive to become an effective deterrent to crime by assisting local law enforcement agencies to resolve outstanding crimes, aid in the apprehension of criminals, and to enhance the quality of life in our county by helping prevent crime.

Planning Process: Situation

- **Mission:** Crime Stoppers aids law enforcement agencies by increasing community awareness of Crime Stoppers through education programs, effective tip programs resulting in arrests, providing law enforcement with the resources to increase effectiveness thus building a strong partnership with law enforcement.

Planning Process: Situation

◎ Group Brainstorming

- Use flipchart or projection
- Open mind and free thought process to stimulate idea generation
- Withhold criticism
- Welcome new, unusual ideas

Planning Process: Situation

- ◎ Brainstorming
- ◎ Thinking internal strategic factors:
 - Crime Stoppers organization strengths
 - Crime Stoppers organizations weaknesses

Planning Process: Situation

- Brainstorming

- Thinking of external strategic factors:

- Crime Stoppers opportunities
- Crime Stoppers threats

Planning Process: Situation

◎ Affinity Process

- Take brainstorming ideas and group into like categories
- Combine and improve a number of similar ideas into a single better idea

Planning Process: Situation

◎ Multi-voting

- Method to identify key areas group determines to focus energy initially from brainstorming ideas
- Each member gets 5 votes
- Look for a separation of votes

Planning Process: Target

- Develop goals and objectives from ideas receiving highest votes
- Set up small committee to formulate goals/objectives
- Exercise: Select one to write goal

Planning Process: Target

- ◎ Categorize/group by function, such as:
 - Finance
 - Fund raising
 - Governance
 - Leadership

Planning Process: Path

- ◎ Identify accountability for each goal
 - Committee or group of individuals

Planning Process: Path

- ◎ Plans or steps necessary to initiate and implement the goal
 - Develop a simple action plan for each goal
 - Develop a timeline

Crime Stoppers USA
Strategic Plan
Action Plan to Achieve Strategic Initiatives

Strategic Initiative: Membership Services

C.1 - Legal succession planning. Develop a plan that will provide for legal services for members if and when Judge Richard Carter decides to retire.

Objective	By Whom	By When
1. Verify commitment of legal services that should be provided by CSUSA. - Should CSUSA offer legal services at all? - Should CSUSA look up lowering the current service level provided?	Executive Committee	1/1/2013
2. Depending on the level of service required by CSUSA, determine access to legal professionals. - Survey current Crime Stoppers members to identify any potential interest. - Survey law schools for any young professors in criminal law that may be willing to do some pro bono work. - Funnel to a retained firm with funding retainer up to a certain amount of hours. -	Executive Committee	6/30/2013
3. In conjunction with Judge Richard Carter, develop a succession and transition plan at least one year prior to retirement.	Executive Committee	TBD
4. Consider establishing a clearinghouse for legal issues coming through Crime Stoppers USA before directing them to our general legal counsel.	Executive Committee	1/1/2013

Planning Process: Path

- Follow up on plan from time to time throughout year
- Hold committees accountable
 - Committee reports to include strategic plan updates
- Follow up on plan from time to time throughout year

Planning Process: Life Cycle



Strategic Planning - Summary

- Evaluate current situation
- Establish targets
- Create a path
- Identify accountabilities
- Measurement
- Follow up

Strategic Planning – Questions?



Contact Information:

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