

# **SESSION 2**

## STRATEGIC PLANNING for ASSOCIATIONS

# Strategy

/stra-te-ji/

def: The making of a plan to either solve a problem or fulfill an aim. Often used in business to describe the company direction.

# So many models...

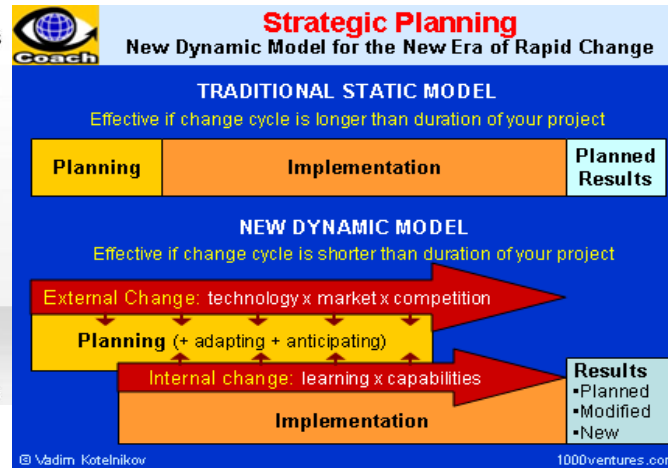
Circular Pyramid Business Strategic Planning 7 Stages



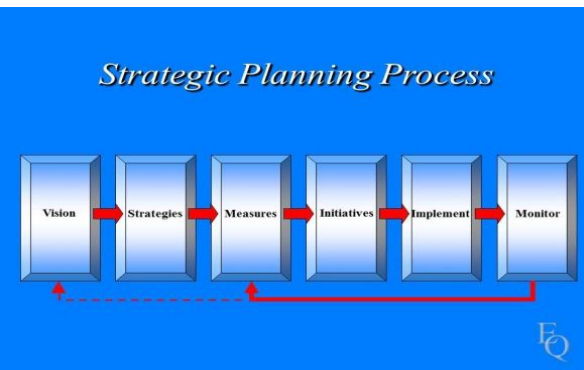
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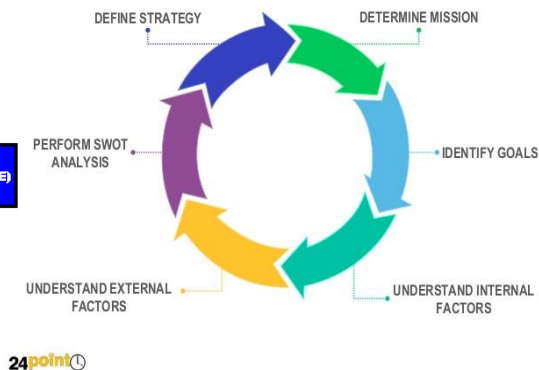
Your Logo



*Strategic Planning Process*



**Strategic Planning Process Model**



# ...but we will use this 'roadmap'...



2



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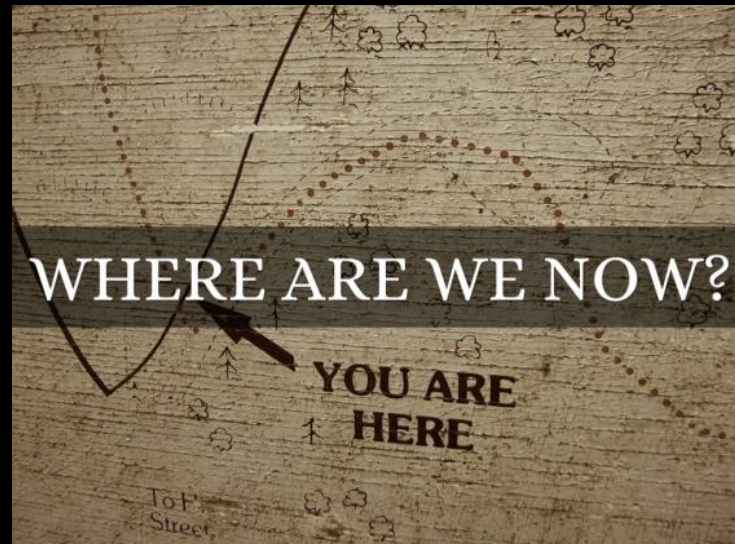
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1

# Part One

1





1

## **S**trengths

Advantages  
Capabilities  
Resources, Assets, People  
Marketing - reach, distribution, awareness



## **W**eaknesses

Lack of competitive strength  
Financials  
Our vulnerabilities  
Timescales, deadlines and pressures  
Continuity, supply chain robustness



## **O**pportunities

Market developments  
Business and product development



## **T**hreats

Environmental effects  
Market demand  
Obstacles



# Example SWOT Analysis

## STRENGTHS

- 40 years as an institution
- regional alliance
- recognized by the U.N.
- 102 members; 42 countries
- financially-sound

- broad mandate:  
*“advance sustainable development”*
- emergence of different models of DFIs
- diverse membership
- international partnerships
- relationships with WB, ADB

## OPPORTUNITIES

## WEAKNESSES

- communicating DFI mandate
- perceived lack of appreciation by gov'ts. of DFIs' role
- weak recall/awareness
- lack of media presence

- difficulty to mainstream
- blurring distinction of FIs
- competition from other assns.
- lack of awareness=lack of appreciation

## THREATS



## SWOT Analysis

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### Strengths

- Characteristics that give your business an advantage over others
- What is your value proposition, how does it differentiate with your competitors?
- What do others perceive as your strengths?

S

W

### Weaknesses

- Characteristics that place the business at a disadvantage relative to others
- What do your competitors do better than you?
- What do others perceive as your weaknesses?

### Opportunities

- What are the elements your business could exploit to its advantage?
- What trends, conditions that may positively impact you?

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### Threats

- What are the elements in the environment that could cause trouble for your business?
- What trends or conditions may negatively impact you?



# DISCUSSION

# **GROUP EXERCISE 1**

- 1. Group yourselves into more or less similar-purposed associations, if possible.**
- 2. Individually, make a list first of your own association's strengths and weaknesses; opportunities & threats.**
- 3. Discuss with your tablemates, your own listing and try to come out with a common SWOT within the group.**
- 4. Present in plenary your group discussion results.**

# Part 2

2

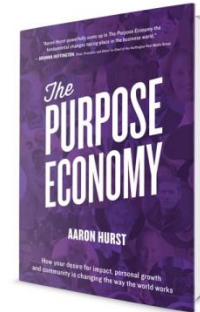
Why  
Are We  
Here?

Let's talk about  
**PURPOSE!**



# Purpose economy

Purpose comes  
from doing  
something that we  
believe matters.



*with*

PURPOSE

**COMES**

**Relevance**



# pur·pose

*/ˈpərpəs/*

Noun

The reason for which something is done or created  
or for which something exists.

# Purpose, Mission, Vision

- PURPOSE *guides* you. Your purpose statement articulates *why* you do what you do, *why* your organization exists, and *why* you serve a higher purpose (*your cause*).
- MISSION *drives* you. Your mission statement is *what* you do to accomplish your purpose, and *what* difference you make, *what* change will happen. Your mission is what drives you every day to fulfil your purpose. It's a direct path between your purpose and vision. Mission is doing what really matters and eliminating the distractions.
- VISION is what you *aspire* to. Your vision statement is *where* you will be in the distant future, the results you want to achieve, or the measurable impact you want to make. Vision aligns leaders and followers. It is an on-going process of aligning your mission to your purpose. Vision keeps you on course to fulfil your purpose.

# Purpose, Mission, Vision

PURPOSE



you

Why?

MISSION



You

WHAT?

Vision



you

Where?

# Purpose Statements



To solve unsolved problems innovatively.



To make people happy.



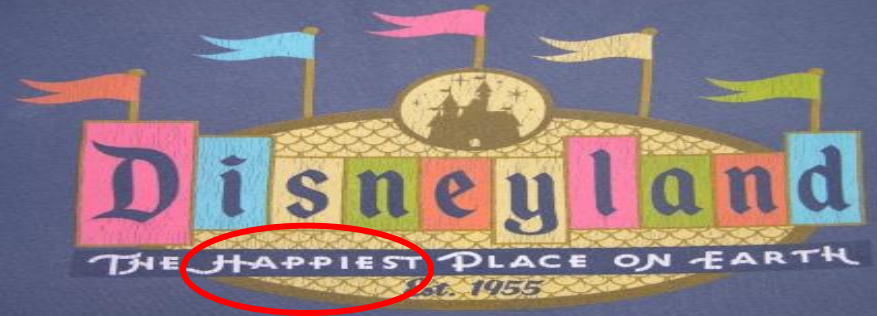
**BOEING**

To be the cutting edge in aerospace.





# Disney



## Disney Consumer Products





Helicopter History Site  
Thanks Boeing



Helicopter History Site

Donated by the USCG



More examples...





- To improve life **here**,
- to extend life to **there**,
- to find life **beyond**.





**WE ARE**

A pharmacy innovation company

**OUR STRATEGY**

Reinventing pharmacy

**OUR PURPOSE**

Helping people on their  
path to better health

**OUR VALUES**

Innovation

Collaboration

Caring

Integrity

Accountability

Helping people on their  
path to better health.



**"We inspire and nurture the human spirit — one person, one cup, and one neighborhood at a time"**

**your Association's**  
**WHAT'S OUR ~~PURPOSE~~? Raison d'être? DNA?**





# PCAAE's Purpose Statement



**“To make associations sustainable.”**

- \* To achieve this, the association executives are our agents of change. How? By equipping them to professionalize association governance and management.**



**Association  
Executive**

FRONT

**Sustainable  
Associations**

BACK

# DISCUSSION

## GROUP EXERCISE 2

1. Group yourselves into more or less similar-purposed associations, if possible. Initially answer individually why does your Association exists, its *reason for being*.
2. Discuss with your tablemates your Association's purpose statement and compare notes.
3. Present in plenary your group's discussion results.
4. How would you describe your Association on the back of a T-shirt? (*how would you capture the essence of your Association in an image or with a short slogan?*)

# PART 3

3

what  
are we *doing?*

**with**



purpose

**COMES**

**mission**





"Got to admit, as far as mission statements go, it's pretty damn bold."



*"Our Roadmap starts with our mission, which is enduring. It declares our purpose as a company and serves as the standard against which we weigh our actions and decisions."*

**Mission:**

- To refresh the world...
- To inspire moments of optimism and happiness...
- To create value and make a difference.



## Mission Statement

At eBay, our mission is to provide a global online marketplace where practically anyone can trade practically anything, enabling economic opportunity around the world."

# **GOLD'S GYM MISSION**

To positively change people's lives  
by providing the ultimate  
fitness experience.

**Change Your Body. Change Your Life.™**





To advance **association governance & management** in the country by **accelerating innovation** and enhancing the **capacity and growth opportunities** of members and partner-institutions through a **collective voice & shared expertise & values.**

# DISCUSSION



## GROUP EXERCISE 3

1. Group yourselves into more or less similar-purposed associations, if possible. Initially answer individually:
  - *what does your Association do to accomplish its purpose;*
  - *what difference does your Association make; and*
  - *what change will happen if your Association does what it is supposed to do?*
2. From the responses above, write in brief your Association's mission statement.
3. Discuss with your tablemates your Association's mission statement and compare notes.
4. Present in plenary your group's discussion results.

# Part IV

4





**VISION**

# vi·sion

/'viZHən/ n.

Imagined **idea** or  
a **goal** towards  
which one

**aspires**



General Electric



Vision:

'We bring good things to life'.

**Microsoft**

VISION

Uplift All Lives

Volunteers  
of America  
MINNESOTA - WISCONSIN

**Vision Statement:**

*"A personal computer in every home running  
Microsoft software." (FUTURE)*

alz.org® | alzheimer's association®

**OUR VISION:**

A world without Alzheimer's.



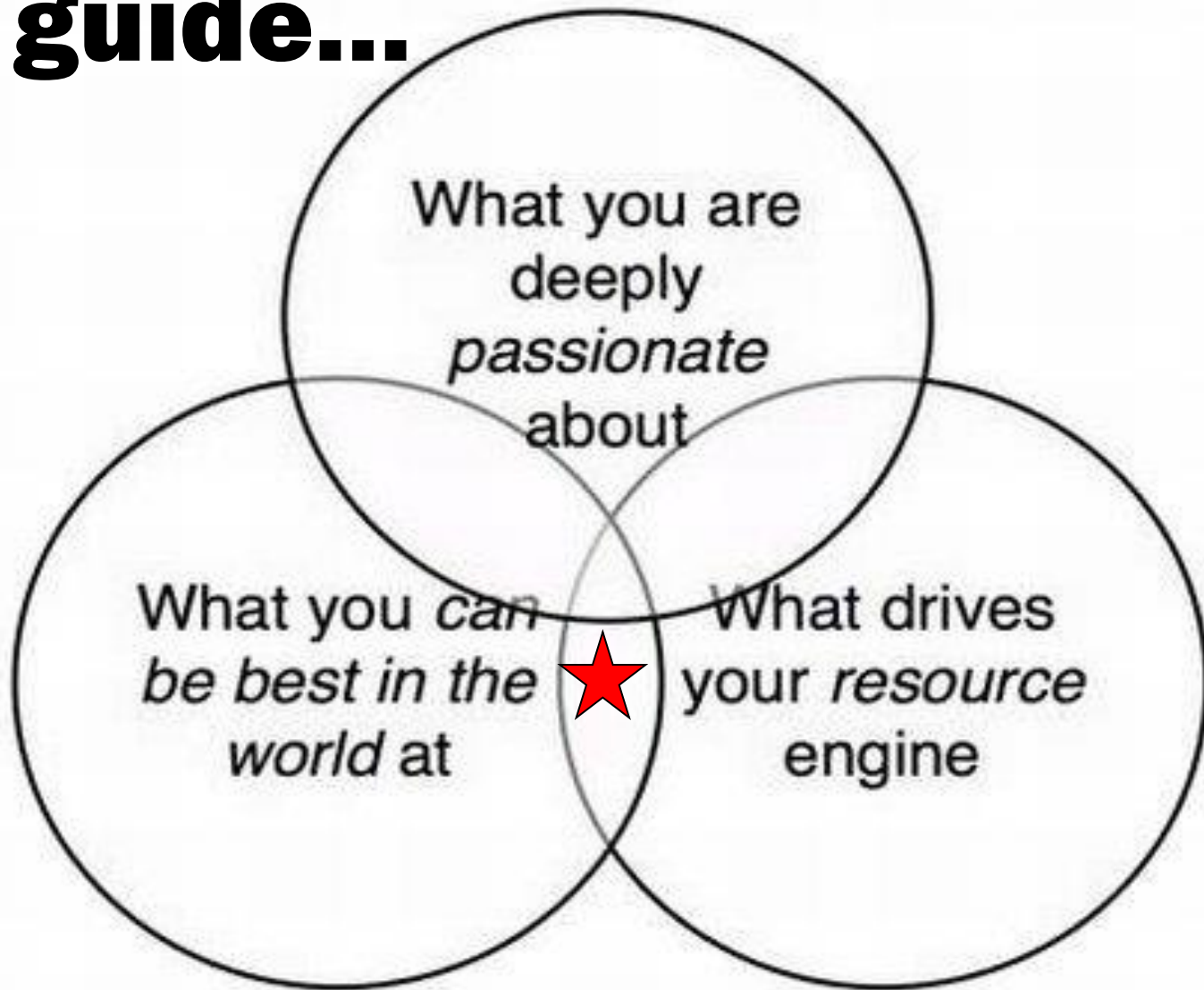


A **PHILIPPINES** where **ASSOCIATIONS** &  
other **MEMBERSHIP ORGANIZATIONS**  
are managed by



**Professional  
Association  
Executives.**

# A guide...



# DISCUSSION

## GROUP EXERCISE 4

1. Group yourselves into more or less similar-purposed associations, if possible. Initially answer individually what is your Association's **dream / aspiration / hope** going forward?
2. From the response above, write in brief your Association's vision statement.
3. Discuss with your tablemates your Association's vision statement and compare notes.
4. Present in plenary your group's discussion results.





the









How to write

A BUSINESS PLAN



**END OF  
SESSION  
THANK YOU!**