

State Network Strategic Planning Guide

There is no more powerful engine driving an organization toward excellence and long-range success than an attractive, worthwhile and achievable vision of the future, widely shared.

■ Burt Nanus

Introduction

What is Strategic Planning?

Simply stated, *strategic planning* is a process that helps a group of leaders answer four important questions about their organization:

- Who Are We? (purpose)
- What Do We Stand For? (values)
- Where Are We Going? (vision and long-term goals)
- How Will We Get There? (strategies and priorities)

For State Networks within Women's Council, the answers to the first two questions are clear.

Who are we? The purpose of every State Network within Women's Council is to achieve four goals:

1. Identify and develop leaders.
2. Develop and support local networks.
3. Strengthen relationships and collaboration within the industry.
4. Consistently embody the Women's Council brand.

What do we stand for? Women's Council has established five operating values that guide leaders throughout the organization (see the Women's Council Strategic Plan for more detail):

Leadership
Influence
The Power of Collaboration
Opportunity
Professional Credibility

What are the Benefits of Strategic Planning?

The benefits of strategic planning for a State Network are many and include:

- building a strong consensus around goals and priorities
- maximizing and providing clear direction for use of Network resources
- fostering teamwork and accountability among all leaders and volunteers
- supporting and furthering the mission and vision of Women's Council

Preparing to Plan

Who Should Be Involved?

Planning is a team activity. Agreement on the direction, goals and priorities of the state network is ultimately the responsibility of the Leadership Team in conjunction with the Governing Board. For small or medium size state networks, the Governing Board can constitute the Strategic Planning Committee (ideally no more than 15 to 20 people), with the possible addition of an emerging leader or two or an additional past leader to add broader perspective.

In large state networks, a Strategic Planning Committee can be appointed that could include:

- the Leadership Team
- the immediate Past President
- Committee Chairs
- District Vice Presidents
- One or two local presidents
- One or two other emerging or past leaders as desired

In all cases where the Governing Board is not the Strategic Planning Committee, they should be asked for their input ahead of the session as well as officially approve the strategic plan once it is completed.

Leading the Planning Session. The President-elect should preside at the meeting, but not lead the planning session. The individual chosen should have meeting facilitation skills to manage the planning process, keep the group focused, and ensure positive, productive discussion. It is recommended that the planning facilitator *not* be a current network leader – current leaders need to be full participants in the planning process and may not be seen as objective by the Strategic Planning Committee. Suggestions for a planning facilitator include:

- a respected past president with meeting facilitation skills
- a leader or member of the State Association of REALTORS® seen as credible and objective
- a known individual with facilitation experience from the local community, college or university or other organization

What Information and Input Should Be Gathered?

Decisions made during the planning process should be *informed* decisions. As a result, one of the most important steps in planning is the information and input that is gathered ahead of the planning session for the Strategic Planning Committee to consider and to broaden their perspective. Three types of information and input should be gathered to prepare for strategic planning:

Industry and Market Conditions

- What are the trends and emerging issues facing the industry and impacting members' success as business leaders?
- What is the market outlook for the next three to five years?
- What other groups or industry resources compete with Women's Council (overlap in purpose or membership)?

Stakeholder Input

- What are the needs, perceptions and expectations of local network leaders?
- What are the needs, perceptions and expectations of state network strategic partners?
- How do other key industry players outside of the Council view the State Network?
- How productive is the state network's relationship with the State Association of REALTORS® and other related organizations?

Network Operations

- How strong, healthy and viable is the State Network?
- What are the trends related to membership, finances, volunteer/leader development, state network event attendance, etc.?

Summarize this information in a readable form that can be shared with the Strategic Planning Committee *ahead* of the session for their review.

How Can We Ensure the Most Productive Planning Session?

Planning is an intense activity that requires minimal distractions and a good amount of energy from the group. If possible, it is recommended that the network strategic planning retreat be conducted as a stand-alone event, separate from scheduled network meetings, or at least with adequate time devoted before or after a state event. A commitment of a full day (or two half days) will be required.

Timing. The strategic planning session should be held at some point *after* elections of the new leaders, but *before* the start of the new leadership year and *before* the development of the annual network budget. In this way, the decisions made in the strategic plan can drive network focus, operations and resources.

Meeting Space. Like any meeting, orchestrating a strategic planning session requires attention to details to ensure a productive result. A planning session has some unique qualities that may require additional attention. As much as possible, an environment has to be created which is conducive to strategic thinking, creativity and open discussion. While much of this environment is created through an appropriate planning process and the tone set by the planning facilitator, there are several important things that can be done. Here are a few of the basics:

- Room size should be big enough to accommodate the entire planning group comfortably, with added space, if possible, for small group breakout discussions
- The room should have plenty of usable wall space on which to post the results of the discussion
- Make sure a flip chart is available with a full pad
- In developing the agenda, ensure ample time is allotted for each step of the planning process and that appropriate breaks are scheduled

Planning Session Materials. At a minimum, before the session the planning group should receive 1) an agenda reflecting the key steps to be taken in the planning process, start and end times and any breaks/planned meals, 2) meeting location, address, phone, and contact person, and 3) any background data collected for review prior to arrival at the session (see 'information to be gathered' above).

Developing the Plan

What Are the Key Steps of the Planning Process?

Step 1

Review information and input gathered and discuss implications for the focus and work of the Network in the coming year and beyond. Note any issues that should be considered in the strategic plan.

Step 2

Give the Strategic Planning Committee a chance to dream a bit. Ask them to imagine the State Network in five to seven years. What does it look like? How does it operate? How do others perceive the network? What value is it delivering? Jot down some of the common thoughts of the group, noting where there is a *shared* vision among the group. Use this exercise to inspire the group throughout the rest of the process. If desired, capture this vision in a statement that can be included as part of the strategic plan. For inspiration, use the National Women's Council vision statement: *The Women's Council of REALTORS® is recognized as the voice for women in real estate, and the premier source for the development of leaders in the industry, organized real estate and beyond.*

Step 3

Consider each of the four goals of a State Network (see above), and ask the following questions:

- What do we do now in this area?
- How is it working?
- Where can we improve? (note *opportunities* for action or change)
- What results do we want to accomplish in the coming year and beyond (develop *objectives* for each *opportunity* that can be accomplished in the coming year; also consider more challenging, longer range objectives that the entire leadership *team* can commit to over several years).
- How can we improve in these areas (develop *strategies* to achieve objectives and *prioritize*)

Step 4

Evaluate the 'state of the state network' and how efficiently and effectively the network is operating. Consider areas such as network financial health, volunteer/leader development, operating systems, administrative support, etc. Identify additional *opportunities* and establish *objectives*, *strategies* and *priorities* for these areas as well.

The attached State Network Strategic Planning Template captures all of these planning steps and provide space for Strategic Planning Committee members to take notes and record decisions throughout the process.

Step 5

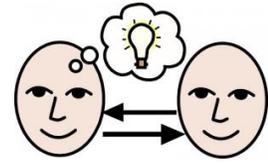
Document the decisions made during the planning process and secure formal approval of the plan by the State Network Governing Board.

Plan Implementation and Monitoring

The overall purpose of strategic planning is to drive toward action and positive change in the organization. The mere creation of a network strategic plan, however, is not enough to bring about these changes. Although the *process* of planning has many benefits in focusing the network on a common direction and set of priorities, without a similar process in place to ensure implementation of the plan, little progress can be made. In short, *working the plan* is as important as *planning the work*.

Take the following steps once the plan is complete.

- Assess resources needed to accomplish plan objectives and priorities for the coming year. Resources include dollars, volunteers (project teams), outside resources, etc.
- Delegate specific tasks from the strategic plan to appropriate committees, project teams and individuals to accomplish.
- Establish how progress on the strategic plan will be monitored, including appropriate oversight of sections of the plan by members of the Leadership Team, regular reports to the Governing Board, etc.
- Don't hesitate to adjust the plan and the priorities throughout the year based on progress made and/or unanticipated issues that arise and deserve attention or priority. The Strategic Plan is a *living* document that should be a tool to help the network stay focused and be responsive to change in the industry or the network operating environment.
- Share accomplishments with all members and partners – enthusiastically – thanking all for their support and involvement.
- Update the plan annually, defining priorities for the coming year and considering objectives that the entire Leadership Team can pursue over time to advance the network.



Women's Council of REALTORS®

State Network Planning Guide Template

1 What did we learn from the information and input we gathered?

Key Trends and Perceptions → **Implications for the State Network**

Potential issues to be addressed in our strategic plan:



What is our vision of the ideal State Network of the future?

In 5 to 7 years . . .

What do we look like? How will we operate? How do others perceive us? What value are we delivering?

Reference: Women's Council Vision

The Women's Council of REALTORS® is recognized as the voice for women in real estate, and the premier source for the development of leaders in the industry, organized real estate and beyond.

Our Common Thoughts:

3

What do we want to accomplish in the coming year, and beyond?

State Network Goal: *Identify and Develop Leaders*

<i>What do we do now in this area?</i>		<p>Set Objectives that are SMART</p> <p>Specific: will produce tangible results</p> <p>Meaningful: represents substantive work that furthers the Council’s mission and vision</p> <p>Achievable: results we can accomplish with commitment and teamwork</p> <p>Realistic: feasible within resources available or that can be obtained</p> <p>Timely: work that takes advantage of opportunities we should address now or in the near future</p>
<i>How is it working?</i>		
<i>Where can we improve? →</i>	<i>Opportunities for Action/Change</i>	
<i>What results do we want to accomplish in the coming year?</i> Objectives:		
<i>What longer term Objective should we set that might take two or more years to achieve?</i>		
<i>How can we improve in these areas?</i> Strategies (in priority order) <ol style="list-style-type: none"> 1. 2. 3. 4. 		

3

What do we want to accomplish in the coming year, and beyond?

State Network Goal: *Develop and Support Local Networks*

<i>What do we do now in this area?</i>		<p>Set Objectives that are SMART</p> <p>Specific: will produce tangible results</p> <p>Meaningful: represents substantive work that furthers the Council’s mission and vision</p> <p>Achievable: results we can accomplish with commitment and teamwork</p> <p>Realistic: feasible within resources available or that can be obtained</p> <p>Timely: work that takes advantage of opportunities we should address now or in the near future</p>
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<i>How can we improve in these areas?</i> Strategies (in priority order) <ol style="list-style-type: none"> 1. 2. 3. 4. 		

3

What do we want to accomplish in the coming year, and beyond?

State Network Goal: *Strengthen Our Relationships and Collaboration within the Industry*

<i>What do we do now in this area?</i>		<p>Set Objectives that are SMART</p> <p>Specific: will produce tangible results</p> <p>Meaningful: represents substantive work that furthers the Council’s mission and vision</p> <p>Achievable: results we can accomplish with commitment and teamwork</p> <p>Realistic: feasible within resources available or that can be obtained</p> <p>Timely: work that takes advantage of opportunities we should address now or in the near future</p>
<i>How is it working?</i>		
<i>Where can we improve? →</i>	<i>Opportunities for Action/Change</i>	
<i>What results do we want to accomplish in the coming year?</i> Objectives:		
<i>What longer term Objective should we set that might take two or more years to achieve?</i>		
<i>How can we improve in these areas?</i> Strategies (in priority order)		
1.		
2.		
3.		
4.		

3

What do we want to accomplish in the coming year, and beyond?

State Network Goal: *Consistently Embody the Women’s Council Brand*

<i>What do we do now in this area?</i>		<p>Set Objectives that are SMART</p> <p>Specific: will produce tangible results</p> <p>Meaningful: represents substantive work that furthers the Council’s mission and vision</p> <p>Achievable: results we can accomplish with commitment and teamwork</p> <p>Realistic: feasible within resources available or that can be obtained</p> <p>Timely: work that takes advantage of opportunities we should address now or in the near future</p>
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<i>How can we improve in these areas?</i> Strategies (in priority order)		
1.		
2.		
3.		
4.		

4

What is the 'state of our State Network'?

Are we operating as effectively and efficiently as we could? Consider the following areas of Network operations and then identify any related opportunities for improvement, objectives, strategies and priorities needed. Include these in the Network Strategic Plan.

Network Financial Health	Development of Network Volunteers, Leaders
Network Operating Systems	Other Factors that Impact Network Operations

Objectives, Strategies and Priorities Related to Network Operations:

Blank area for writing objectives, strategies, and priorities related to network operations.



What resources do we have or will we need to accomplish our Plan?

Budget:

Talent, Experience, Perspective of Our Members:

Outside Expertise:

Data, Research, Input:

Other:

Other Considerations for a Successful State Network Year

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