



## The *New* Strategic Planning

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## Overview

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### Objectives

- Define and describe an enhanced strategic plan
- Introduce brand, image, and position as planning context
- Integrate planning, marketing, and communications
- Challenge veteran staff and board to apply more sophisticated tools towards organizational development and growth

### Outcomes

- Define and apply concepts of brand, position, and image
- Update strategic planning for a more integrated strategic positioning approach
- Understand how to strategically position your organization in the community for stronger visibility and results
- Use position to move to the next level

### Agenda

- Introduction
- Definitions and Frameworks
- Strategic Planning
- Strategic Positioning
- Integrating Planning, Positioning, and Organizational Development
- Application and Questions

### Strategic

*Deliberate, calculated decisions or design based on an understanding of external, market, and internal forces and current and expected conditions; broad, organization-wide, over-arching all programs and services*

*“Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does and why it does it.”*

*(Bryson)*



*“The essence of strategy is choosing what not to do.” (Porter)*

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## Definitions

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**Brand:** An organization's (or program's) essence. The distinguishing, enduring, and endearing characteristics. Brand is the distinct quality or experience that becomes universally anticipated by the constituents.

**Goals:** The results or outcomes in specific, measurable, attainable, realistic, time-framed terms that define what will be achieved or accomplished by a variety of programs, tasks, or activities.

**Identity:** The distinct and unequivocal definition and description of the program. Defined by why, what, and how it does what it does. Typically made explicit by the mission, vision, values, goals, and objectives.

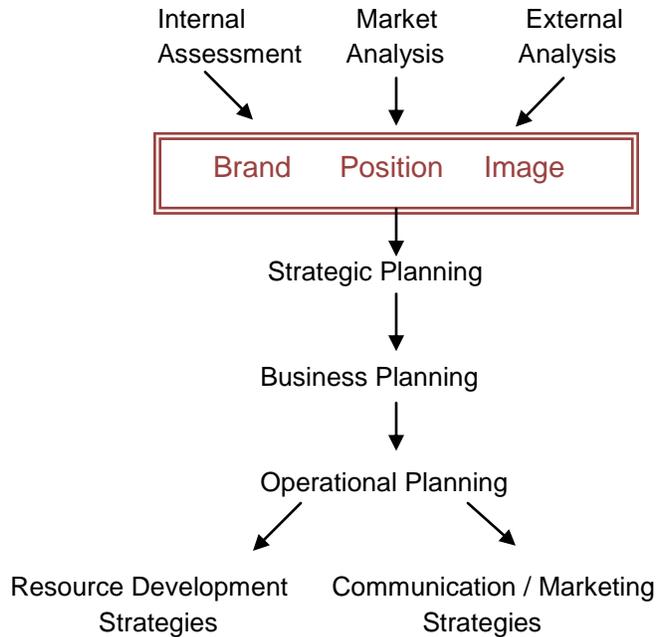
**Image:** How others perceive the organization; should be aligned with identity.

**Imperatives:** Those things that emerge as essential for the organization's strategic focus. Based on the situation analysis, likely to be the obvious conclusions of an objective, analytical, systematic, and comprehensive process.

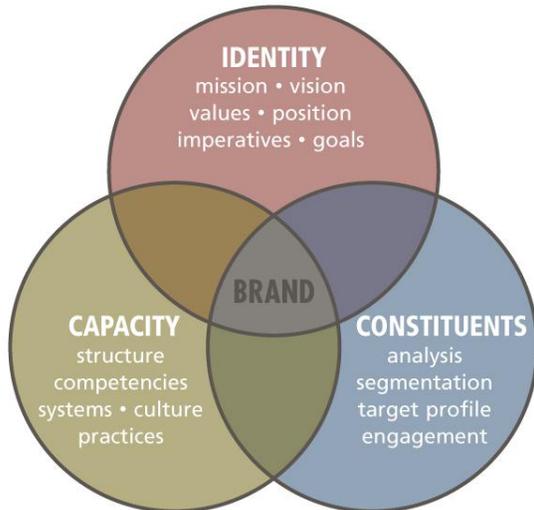
**Objectives:** Those few strategies that will most efficiently and effectively achieve strategic goals and align with the organization's unique purpose, method, and niche.

**Position:** The place or niche the program occupies within a sphere of influence. By definition, position is relative to the other programs that operate within that sphere.

## Frameworks



## Integrated Strategy



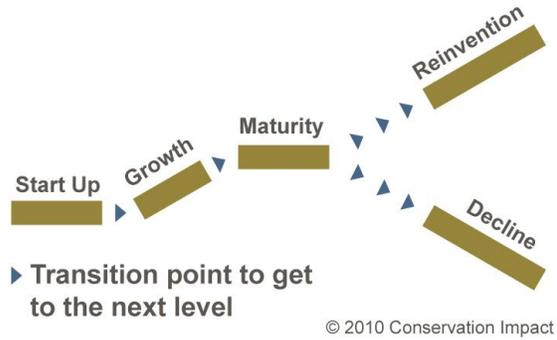
Integrated Strategy for Success and Sustainability © 2010 Conservation Impact

*Organizations / programs with a strong, consistent, coherent identity; a broad-based, engaged and loyal constituency; and the capacity to do the work are successful and sustainable.*

*Brand emerges from the integration of identity, constituents, and capacity. Brand is what makes the organization distinct and distinguishable.*

*It is that distinction that attracts the support and resources necessary to sustain a program.*

## Next Level



*The next level generally refers to an organization's ability to leverage assets and brand to be more successful towards achieving mission-related results; to reach and engage a larger and more supportive constituency; and to be more strategically, operationally, and financially focused, stable, and sustainable.*

## Strategic Planning Outline



### Situation Analysis

- External – socio-economic-political
- “Industry” trends
- Comparative analysis
- Demographic and psychographic trends and issues
- Internal capacity

### Strategic Issues / Decisions

- Fundamental, core

### Impact

- What difference are you going to make?

### Mission

- Purpose, short declarative and simple – why you exist

### Vision

- Descriptive, visual image of what it looks like when you are successful

### Imperatives

- Those things you must do, to the exclusion of all else, to be successful moving forward

### Goals

- Specific, detectable, realistic *outcomes* / results - what you will accomplish

### Objectives

- How you achieve goals – the few overarching strategies (not all the tasks) towards outcomes

## Operating Plan

Strategic Goal 1	Critical Tasks	Necessary Outcome	Staff / Board / Volunteer Responsibility	Due Date
Objective 1				
Objective 2				
Objective 3				

## Template: Project Plan

Goal \_\_\_\_\_

Deliverable \_\_\_\_\_

Accountable Party \_\_\_\_\_

Task #	Task	Start-End Date	Duration Hrs. required	Responsible Parties	Resources Needed
1.1					
1.2					
1.3					
1.4					
1.5					
1.6					
1.7					
1.8					

## Strategic Positioning

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### Overview

- More sophisticated planning considers brand, position, and image.
- A more externally focused, market-driven analysis to define the organization's identity and niche.
- Position considers competitive environment and niche opportunities.
- Potent organizations fully occupy and “own” their niche.
- Positioning capitalizes on distinction and assets to go to the next level.
- Can't sort of position, have to build whole organization around position, requiring focus and deliberate planning and development.



*Positioning quite literally defines the tables at which you sit.*

### Watershed Examples

- Local watershed groups positioned relative to state, issue, and national organizations, i.e. American Rivers
- Local watershed groups positioned relative to other conservation and environmental groups
  - Non-adversarial, i.e. the good guys
  - Water as everyone's issue
- Opportunity or expectation
  - Mohonk Preserve – leadership position “yours to lose”

## Positioning Process



### Situation analysis

- Trends, issues
- Industry growth and changes
- Institutional landscape

### Competitive / comparative environment

### Constituent / potential constituent interests and unmet needs

- Demographics and psychographics – how people behave relative to a product or cause
- Market trends (external to organization, not satisfaction surveys)
- Opportunities and unmet needs

### Organization's distinctive competencies and assets

- Underutilized assets
- Distinct history, brand, strength
- Latent or untapped potential

### Gaps, needs, or unsolved problems

- Overlap of external needs and internal assets

### Alternative positions

- Geographic sphere
- Competencies
- Market niche; other?

### Strategically advantageous / feasible / necessary position

- Position decision
- Organizational implications
  - May redefine brand, image
  - Implications for strategic decisions

### Then, strategic plan based on position

- See strategic plan outline

### Organizational design and development

- See *Integrated Strategy*

## Alternative Position Implications

### Sample

Identity	Outdoor Volunteerism	Stewardship Ethic	Public Lands Stewardship	Trails
Tracks / Themes	Recreation focus Conservation focus	Attitudes / knowledge Behavior change	Definition of public lands Stewardship – ecological, recreational, land management needs	Recreation Nature / habitat corridors Greenways / river
Outcomes	Volunteer engagement – impact on volunteerism	More stewardship by more people – impact on people’s beliefs and behaviors	Changes to the landscape – impact on the land	Changes to trails
Measurement	# of volunteers	Measurement of change in attitude/ knowledge, demonstration of changed behavior	Amount and impact of public land maintained, protected, enhanced	Miles of trail built, maintained, improved
Strategic Focus	Volunteerism – civic engagement	Knowledge or behavior change	Land planning / management / implementation	Trails and recreation access
Brand	Best outdoor volunteer experience	CO’s leading stewardship through hands on volunteer experience (relative to education)	Stewardship projects (from planning to implementation)	High quality technical trails
Position	Largest (most diverse?) outdoor volunteer group in state		Only statewide-largest – comprehensive stewardship group	Largest, statewide volunteer trail group
Message	Volunteering is good	Creating long-term behaviors to care for the environment	Take care of our precious natural landscapes	For your enjoyment
Strategic Partners	Schools, churches, companies	Schools, conservation groups, community groups	Federal, state, local agencies	

Identity	Outdoor Volunteerism	Stewardship Ethic	Public Lands Stewardship	Trails
Target Markets	Volunteers / any group that has an outdoor project	Children, young adults, outdoor users	Outdoor enthusiasts / public land managers	Trail users and user groups / Public land recreation managers
Competition	Habitat for Humanity	Environmental Ed groups; Conservation groups; watershed groups etc.	Place based – RFV Issues specific – WRV CYCA Friends groups	Special interest groups (IMBA) Place based (Cont. Divide)
Strategies	Diverse volunteer opportunities – get people outdoors	Education Training Demonstration	Planning – prioritizing projects by public land need Create teams / strategies to fit needs	Trail projects Prioritizing by trail use / needs / interest

## The Next Level: Positioning or Re-positioning



### **Impact and Success**

- Strategic focus, niche in marketplace to be the model (not done before)
- Example: Mohonk Preserve - leadership

### **Re-invigoration, Reverse Declining Market-share**

- Example: Alaska Center for the Environment; High Country Citizen's Alliance

### **Leverage Assets and Organizational Sustainability**

- Example: Volunteers for Outdoor Colorado

### **Power and Influence**

- Own a niche, expectations
- Example: CANPO

### **Broaden Market Share, Presence**

- Example: Deschutes Land Trust

## Alaska Center for the Environment Sample Positioning Decisions

### *Positioning Goal*

- To engage Alaskans who care about the environment to be both financially supportive and / or to visibly and vocally participate in the protection of Alaska's environment

### *Positioning Statement*

- The **authentic / homegrown** Alaskan moderate conservation organization

### *Positioning Focus*

- Reasonable, practical action
- Substance, solid, reliable information
- Results and integrity

### *Messages / Actions*

- It's okay to act on conservation values - action
- You can be a practical, responsible, sensible environmentalist - moderate
- We act to protect the environment you care about - now and for the future - results
- We can work together to be accountable for our lands and waters - involvement

### *Brand*

- ACE stands for protecting Alaska's environment - Alaska Style

### *Image*

- Substantive
- Open, accessible
- Reasonable, pragmatic, sensible
- Safe, acceptable, popular to act

### *Target Market*

- Light Greens - Alaskans who care about the environment and can be moved to action

## Sample Outline: Positioning Plan

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- 1) Introduction
  - a) Description
  - b) Purpose and goals
  - c) Methodology
  
- 2) Situation Analysis
  - a) External trends and issues
  - b) Industry analysis
  - c) Comparative analysis
  - d) Market information
  - e) Perceptions
  - f) Opportunities
  
- 3) Organizational Capacity
  - a) Assets
  - b) Distinctive competence
  - c) Obstacles
  
- 4) Position Analysis
  - a) Current position, brand, image
  - b) Positioning opportunities and alternatives
  - c) Scenarios
  
- 5) Selected Position
  - a) Strategic issues
  - b) Target market and marketing implications
  - c) Brand and image
  - d) Strategic focus
  
- 6) Organizational Implications
  - a) Strategic plan
  - b) Design and development
  - c) Programming and outreach
  - d) Strategic alliances

If you would like additional information about Strategic Positioning, please visit our website at [www.conservationimpact.com](http://www.conservationimpact.com) where you can download a free educational booklet on this topic.



Conservation Impact provides comprehensive organizational development consulting to nonprofits and related public agencies dedicated to environmental quality and natural resource protection. Founded in 1996, Conservation Impact has worked on more than 765 projects with nearly 500 organizations nationwide and internationally.

The company specializes in strategic planning and positioning, marketing, and organization analysis and development. We use an Integrated Strategy approach that looks at organizational identity, capacity, and constituents. We help our clients go to their next level of development.

The Conservation Impact staff bring significant expertise in nonprofit management, marketing, and conservation planning with degrees in biology, ecology, environmental conservation, nonprofit management, and public administration.

Conservation Impact's sister company, Nonprofit Impact, provides consultation and training to organizations and agencies dedicated to community and public health, education, and human services.

For more information about the companies, our team, or our work, please call us at 303.223.4886 or visit us online at [www.conservationimpact.com](http://www.conservationimpact.com)



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