

Strategic Planning Process

Strategic Planning is a process designed to provide a unified chapter focus. Such a plan ensures that all chapter members know the direction of chapter activities and are working in that direction. A strategic plan assists chapter leaders in focusing allocation of chapter resources to the identified goals. Additionally, a strategic plan takes into account both the internal and external environments that affect a chapter and critical care nursing in that chapter's specific area. Each of the following steps in the planning process will be discussed:

- Mission, Vision, Values and Ethic of Care Statements
- Review of the evaluation of the last year's strategic plan
- Environmental assessment (May be the same as the Chapter Needs Assessment tool or the current Chapter Profile)
- Development of objectives
- Activities to reach objectives
- Work plan
- Evaluation tool(s)

Objectives

Objectives state what your chapter should do in order to work toward achieving the mission, vision, values and ethics of care of the Association. They may include incomplete or extended objectives from the prior or current year. Objectives are specific and are targeted for the upcoming year. Objectives do not tell your chapter how to achieve a certain result, only what result your chapter wants to accomplish. Objectives should have the following characteristics:

- Achievable, but challenging
- Specific, with a single end result
- Consistent with AACN's Mission, Vision, Values and Ethic of Care Statements
- Supportive of AACN's Mission, Vision, Values, and Ethic of Care Statements
- Easily understood by chapter members and Board of Directors, who must approve the plan and contribute to its accomplishment

Activities

Activities simply state how your chapter is going to achieve their objectives or how your chapter is going to do what they said they wanted to do. A well-written activity is more specific than an objective. It may take three or four activities to accomplish one objective. A work plan can, then, be developed to take care of details for specific assignments under each activity. This step also provides a great deal of information to those responsible for developing the chapter's budget. Use the attached sample tracking form or a file card system.

Activities may be written separately on small file cards and then placed in chronological order. When the correct order has been established, work backwards to make an estimate of the time required to complete each activity. Using the target date for completion of the objective, again, work backwards to establish the dates for starting and finishing each activity. This method results in a realistic development of a timeframe, which then can be listed in calendar sequence from top to bottom on a large visual schedule.

Activities, continued

Objectives serve as a contract and a commitment. Therefore, remembering that objectives are statements of expected outcomes, it becomes a simple matter to effectively evaluate progress. The activity schedule provides easy review of movement toward achievement of a particular objective. Attainment of each level identifies the completion of commitments and chapter progress toward an established goal.

Work Plan

The work plan is the final step in the process and may be developed after the objectives and activities have been approved by your chapter's Board of Directors. However, in order to approve objectives, your chapter's Board of Directors will need estimates of associated costs or resources; include both time and money. Developing the work plan provides an opportunity for participation by members, who will be responsible for implementing the plan. The work plan states:

- What needs to be done specifically - the task to be accomplished
- Who is responsible for its completion - it is important to identify, to prevent confusion and misunderstanding.
- When it will start and when it will be completed - starting date and a target date for completion.
- An accurate supporting budgetary projection should be developed within the specific time frame.
- What is the approximate cost, both in time and money - assist in determining cost-effectiveness.

Evaluation Process

The strategic plan for the current year should be evaluated before the new plan is developed. You may wish to include elements or objectives of the current strategic plan, not completed or targeted.

Summary

Building a consensus is critical to the success of your chapter's plan and should be a process that involves all those who will have a part in the plan's implementation and completion. Most certainly, the planning process should include input and final approval by your chapter's Board of Directors.

A group of 8-17 chapter members and leaders may be considered the optimal size for strategic planning. Current chapter leaders, officers and the president must participate in the process. It may be beneficial to have a past president or leader conduct and facilitate the strategic planning meeting. During strategic planning there are no bad ideas. Your plan should be flexible to accommodate change. Consider a system to adjust the plan, if a new issue or opportunity arises during the year. You should also include a plan to determine if a contribution will be made to the *Windward Circle*. The plan your chapter works on this year will be implemented next year.

