

THE EMERALD COAST TRAINER



The Newsletter of the
EMERALD COAST CHAPTER

JANUARY 2005

Leigh Grantham
President

Linking People, Learning & Performance

Renewal in the New Year

The New Year is a time of setting goals, of making resolutions, of out-with-the-old, in-with-the-new. It's a time of renewal. It's a time to re-energize our efforts toward continuous and never-ending improvement.

It's also the time to renew your Emerald Coast Chapter ASTD membership. And the 2005 Chapter Board wants to make sure that you're getting what you expect in return for your dues this year.

This column, our website, this newsletter, our monthly meetings--and every other element of Emerald Coast ASTD--are *intended* to help meet your needs as a training and development professional. How are they working for you? **Help us do the right things by telling us what's working and what we need to do differently.**

Here's how: around January 4, you'll be receiving a membership survey by e-mail. Please complete and return it **within three days**. Your honest and thoughtful input is vital to our chapter goals and action plans for the year. The timely return is important, because we'll be reviewing and analyzing the results as part of our January 11 program, **Strategic Planning, You and Your Inner View**. One of our own chapter members and a strategic planning expert, Carol Morris, will conduct the strategic planning portion of the meeting and will be focusing on how to conduct a SWOT analysis. Len Williams, local Dale Carnegie affiliate, will conduct the Inner View portion of the meeting.

What will your input and involvement mean for you? Not only a chapter that's working more effectively to meet your needs, but also the chance to win a \$20 Applebee's Gift Certificate. All members who return their survey will be entered in a drawing for the certificate.

We need your sincere feedback in order to be an organization that enriches your professional life. We hope to receive your completed survey and to engage you in discussion at our regular monthly meeting on January 11.

Here's to the Best Year So Far,

Leigh Grantham
President

Strategic Planning, You and Your InnerView

When?

11:30 a.m. – 1 p.m.
Tuesday,
January 11, 2005

Where?

OWC
Niceville Campus
Building K, Gallery

Cost

\$10 for Chapter Members
\$15 for non-members
(includes lunch)

RSVP

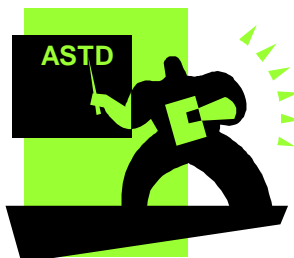
No later than noon
January 7, 2005
To Pam Walters

[waltersp@](mailto:waltersp@owc.edu)

owc.edu

or

(850) 729-5291



Emerald Coast ASTD wants to learn more about you personally and what you expect to get from your local chapter membership in 2005. Come learn more about the strategic planning process, what your chapter membership can offer you, and what you can learn from your fellow members. This promises to be an exciting interactive session...don't miss it. The chapter and your fellow members are counting on you!

Sponsored by ASTD's Emerald Coast Chapter



What is Strategic Planning?

Simply put, strategic planning determines where an organization is going over the next year or more and how it's going to get there. Typically, the process is organization-wide, or focused on a major function such as a division, department or other major function. (The descriptions on this page assume that strategic planning is focused on the organization.)

How to Get a Feel for Strategic Planning -- There's No Perfect Way to Do It

Planning typically includes several major activities or steps in the process. Different people often have different names for these major activities. They might even conduct them in a different order. Strategic planning often includes use of several key terms. Different people might use apply different definitions for these terms, as well.

Don't be concerned about finding the "perfect way" to conduct strategic planning. You'll soon notice that each writer seems to have his or her own particular interpretation of the activities in strategic planning. However, as you read the materials linked from the topic [Strategic Planning](#) in this library, you'll begin to notice some information that is common to most writers.

Read the basic description described below on this page. Then review the various materials linked from the library in the topic [Strategic Planning](#). Once you start strategic planning, you'll soon find your own particular approach to carrying out the process.

One Way to Look at Strategic Planning

One interpretation of the major activities in strategic planning activities is that it includes:

1. Strategic Analysis

This activity can include conducting some sort of scan, or review, of the organization's environment (for example, of the political, social, economic and technical environment). Planners carefully consider various driving forces in the environment, for example, increasing competition, changing demographics, etc. Planners also look at the various strengths, weaknesses, opportunities and threats (an acronym for this activity is **SWOT**) regarding the organization.

(Some people take this wide look around after they've identified or updated their mission statement, vision statement, values statement, etc. These statements are briefly described below. Other people conduct the analysis before reviewing the statements.)

(Note that in the past, organizations usually referred to the phrase "**long-range planning**". More recently, planners use the phrase "strategic planning". This new phrase is meant to capture the strategic {comprehensive, thoughtful, well-placed} nature of this type of planning.)

2. Setting Strategic Direction

Planners carefully come to conclusions about what the organization must do as a result of the major issues and opportunities facing the organization. These conclusions include what overall accomplishments (or **strategic goals**) the organization should achieve, and the overall methods (or **strategies**) to achieve the accomplishments. Goals should be designed and worded as much as possible to be specific, measurable, acceptable to those working to achieve the goals, realistic, timely, extending the capabilities of those working to achieve the goals, and rewarding to them, as well. At some point in the strategic planning process (sometimes in the activity of setting the strategic direction), planners usually identify or update

what might be called the strategic "philosophy". This includes identifying or updating the organization's mission, vision and/or values statements. **Mission statements** are brief written descriptions of the purpose of the organization. Mission statements vary in nature from very brief to quite comprehensive, and include having a specific purpose statement that is part of the overall mission statement. Many people consider the values statement and vision statement to be part of the mission statement. New businesses (for-profit or nonprofit) often work with a state agency to formally register their new business, for example, as a corporation, association, etc. This registration usually includes declaring a mission statement in their charter (or constitution, articles of incorporation, etc.).

It seems that vision and values statements are increasingly used. **Vision statements** are usually a compelling description of how the organization will or should operate at some point in the future and of how customers or clients are benefiting from the organization's products and services. **Values statements** list the overall priorities in how the organization will operate. Some people focus the values statement on moral values. Moral values are values that suggest overall priorities in how people ought to act in the world, for example, integrity, honesty, respect, etc. Other people include operational values which suggest overall priorities for the organization, for example, to expand marketshare, increase efficiency, etc. (Some people would claim that these operational values are really strategic goals. Don't get hung up on wording for now.)

3. Action Planning

Action planning is carefully laying out how the strategic goals will be accomplished. Action planning often includes specifying **objectives**, or specific results, with each strategic goal. Therefore, reaching a strategic goal typically involves accomplishing a set of objectives along the way -- in that sense, an objective is still a goal, but on a smaller scale.

Often, each objective is associated with a **tactic**, which is one of the methods needed to reach an objective. Therefore, implementing a strategy typically involves implementing a set of tactics along the way -- in that sense, a tactic is still a strategy, but on a smaller scale.

Action planning also includes specifying **responsibilities** and **timelines** with each objective, or who needs to do what and by when. It should also include methods to **monitor** and **evaluate** the plan, which includes knowing how the organization will know who has done what and by when.

It's common to develop an **annual plan** (sometimes called the **operational plan** or **management plan**), which includes the strategic goals, strategies, objectives, responsibilities and timelines that should be done in the coming year. Often, organizations will develop plans for each major function, division, department, etc., and call these **work plans**.

Usually, **budgets** are included in the strategic and annual plan, and with work plans. Budgets specify the money needed for the resources that are necessary to implement the annual plan. Budgets also depict how the money will be spent, for example, for human resources, equipment, materials, etc.

For more information on strategic planning and a variety of other management topics, visit Carter McNamara's web site, <http://www.mapnp.org/library>.

BE SURE TO JOIN THE ECASTD CHAPTER'S STRATEGIC PLANNING
MEETING ON JANUARY 11TH!
YOUR IDEAS ARE NEEDED!



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Chapter Website: <http://www.astd-emeraldcoast.org>
 National ASTD Website: <http://www.astd.org>

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Coming Events	Mark Your Calendars!	
Jan. 11, 2005 11:30 – 1:00	ASTD Luncheon: "Strategic Planning, You and Your InnerView"	Carol Morris, <i>Emerald Coast ASTD Member</i>
Feb. 8, 2005 11:30 – 1:00	ASTD Luncheon: "Vocal Power: Is Your Voice Working For or Against You?"	Deborah Boswell <i>Professional Speech Services</i>
March 8, 2005 11:30 – 1:00	ASTD Luncheon: "Tools & Techniques for Engaging Distracted Learners"	Lenn Millbower * <i>Offbeat Training</i>

* = Presenter at the 2004 ASTD International Conference

Publicize your events by sending them to Donna Miller at dmiller@co.okaloosa.fl.us.

Need an exciting, new opportunity? Check our Job Bank at www.astd-emeraldcoast.org

REMINDER: 2005 MEMBERSHIP DUES ARE DUE IN JANUARY THANK YOU!	CHAPTER DUES ARE: \$30 - INDIVIDUALS \$100 - CORPORATE (up to 5 members)
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