

Strategic Planning at the Buzzards Bay Coalition

January 31, 2015



About the Buzzards Bay Coalition

- Founded in 1987
- Over 8,000 individual and corporate members
- Dedicated to the restoration, protection and sustainable use of the Bay and its watershed
- Three main program areas - Science and Advocacy, Land Conservation, Community Engagement
- Significant organizational growth and transformation during last strategic planning period from 2008-2010
- New strategic plan was required to determine how best to utilize resources, capacity and capabilities in support of our mission
- Complexity added to the strategic planning process given our range of programs and geographic footprint.

Strategic Planning requires time, effort and commitment.



A Strategic Planning process should seek to answer several key questions.

- Where are we?
- What do we have to work with?
- Where do we want to be?
- How do we get there?

“Planning to Plan” and gathering stakeholder input is an important first step.

- The Coalition used an external consultant to help facilitate and map out the key steps, keeping us focused on the process and what was important
- Input from a broad range of people was gathered:
 1. **Listening Sessions and Interviews** – conducted by our consultant with a variety of stakeholders; not attributed
 2. **Member Survey** – input from our supporters about what we are doing well, what we could improve and where we should focus
 3. **Community Survey** – telephone poll to gather town-by-town input on the importance of the Bay and their level of connectedness
- Input was synthesized and distilled by our consultant and fed into a **Board and Staff retreat** during which the first draft of our strategic goals were defined.

At the Coalition, Strategic Planning is one step in a cycle of action and organizational evolution

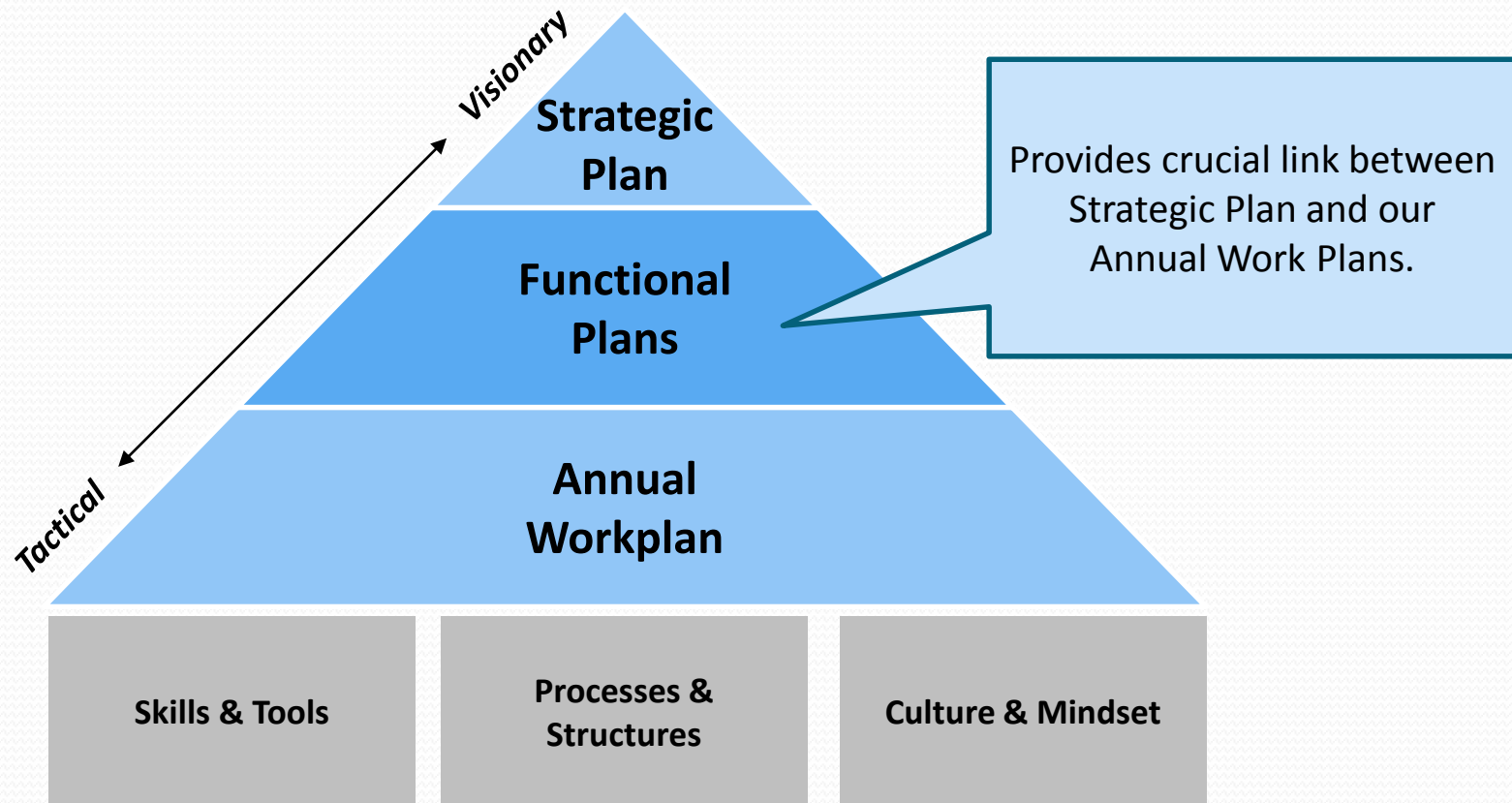
1. **“State of the Bay” Assessment** defining current threats to the Bay and watershed and identifying areas of opportunities related to our mission
2. **Development of a Strategic Plan** in response to those threats and opportunities
3. **Fundraising Campaign** to raise critical funds to support growth in organizational capabilities, capacities and infrastructure
4. **Implementation of the Strategic Plan** through “Functional Plans” timed to coincide with funds raised through the Campaign
5. **Begin again** with assessment of outcomes from implementation period

The “Planning and Implementation Cycle” provides discipline, coordination and consistency

BUZZARDS BAY COALITION PLANNING & IMPLEMENTATION CYCLE



Once the Strategic Plan was complete, dovetailing "Functional Plans" were drafted.



Functional Plans flow from the Strategic Plan and ensure “results-based accountability.”

- Functional plans were developed for Fundraising, Strategic Communications, Watershed Restoration and Youth Engagement
- Key content includes:
 1. Assessment of current capabilities and identify strengths, gaps and action plan to close key gaps
 2. List of specific functional goals in support of the Strategic Plan
 3. Detail on specific guidelines, activities and desired outcomes to meet strategic and functional-level goals

Each Functional Plan is a “living document” and serves as a reference to anchor actions and support annual planning.

Referred to often and updated as necessary.

Some examples from our Strategic Plan, Functional Plan and Annual Workplans

	Watershed Restoration	Fundraising
<i>Visionary</i>	Strategic Plan Goal Permanently protect over 600 acres per year	Expand our Swim and Ride events to include 1,000 participants
↕	Functional Plan Detail Define & identify specific high-priority lands across the watershed	Participant profiles and key messaging
<i>Tactical</i>	Annual Work Plan Action Secure agreements with specific landowners	Annual participation goal with specific marketing activities and milestones

Key Lessons and Takeaways

- Leverage an outside facilitator
- Build broad support and consensus (when possible)
- Include programmatic and organizational development goals
- Define what you will do and not do
- Be audacious, but...plan for implementation
- Translate strategy into tactics...and action
- Course-correct by changing your tactics, not your strategy
- Refer to Strategic and Functional Plans often