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How to Use Strategic Planning to Achieve Your Historic Preservation Advocacy Goals

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Your historic preservation advocacy group may have a clear idea about its goals and lots of ideas about how to accomplish them. But even with all of those great ideas, your group may find itself adrift, wondering how to get from point A to point B. If this is the case, then your group should launch a strategic planning exercise to create a strategic plan.

Your strategic plan will map the next several years of your group's future. It will identify the specific strategies that will help your group achieve its goals. A strategic plan should not simply list out a set of objectives and related tasks. It should be based on your group's mission and reflect your group's strategic thinking about achieving mission-oriented goals.

It will take time for your group to develop your strategic plan. Your group will need to engage in expansive creative thinking before your strategies will crystalize. You may find that a retreat would help your group sketch out its future.

Create a Living Document

Your advocacy group's strategic plan should not be just another report that sits on a shelf until the end of the plan's projected life. It should be a living document that directs your group's daily work. The plan should be reviewed regularly and tied to your regular meeting agendas.

Your strategic plan will outline the steps needed to accomplish each of your most essential goals. It will also identify these key things about your group:

- Primary work areas
- Top priorities
- Challenges
- Opportunities

Strategic plans were once called long-term plans. The conventional name has changed to strategic plan to reflect the how and why of organizational plans. This helps groups to identify strategic goals that respond to big-picture issues and opportunities.

Identify Your Strategic Planning Team

Your advocacy group should form a planning committee to identify the participants for your strategic planning process. All members of your board and primary staff should participate in the process. You should also identify other stakeholders who can participate in the planning process. If you are not sure whether or not someone should be involved in the process, invite that person to participate anyway. It's generally better to be over-inclusive than unintentionally exclusive.

Your planning committee should also keep track of meetings, invitations, and progress. Someone will need to take charge of all plan-related administrative tasks, such as taking minutes at your planning



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meetings, securing the necessary data for decision-making, ensuring that all attendees receive important information in a timely manner, arranging meetings, and generally shepherding the paperwork side of the process.

The process of creating a strategic plan can help build your team of staff and board members and foster a sense of ownership for your group's future. Periods of strategizing, planning, and organizing can solidify relationships and loyalty among long-term board members, staff, and volunteers. Planning work can also help your group identify how to maximize its existing talent.

Develop SMARTER Goals

Professional planners help groups focus on key criteria for their goals by using the acronym SMARTER. When you use the SMARTER approach to goals development, your goals will have all of the following characteristics:

- **Specific**
- **Measurable**
- **Acceptable** to those working to achieve the goals
- **Realistic**
- **Timely**
- **Extend** the capabilities of those working to achieve the goals
- **Rewarding** to those involved

Your strategic goals will grow out of your group's mission statement. For example, your group may have set a goal to double your membership in three years. Your strategic goal might be to double the membership of families with children to aid in long-term growth and to take advantage of family-oriented trends in the local and regional market.

As you work on your strategic plan, your group should consider whether or not your mission is still valid. If it is not, the strategic planning process is the time to make adjustments. You may find that, over time, your mission statement is too general or too specific. You may also find that your success with public education is leading to more advocacy work. Your strategic goals also may change over time to reflect changes in your group or context.

Write Value and Vision Statements

Some preservation groups write value statements and vision statements to complement their mission statement. A value statement can guide the actions your group will take to accomplish its goals. These statements reflect values such as honesty, openness, fairness, inclusiveness, and respect for all participants and the community. Many preservation groups around the country have latched onto preservation's environmentally friendly benefits as an organizational value. If this is a priority for your group, include it in your strategic planning process.

A vision statement could also guide your group's strategic planning process. To write your group's vision statement, think about what your group would like to see in your community if it were located in an ideal universe. For example, passing a preservation ordinance with more teeth is a goal, but not a vision. But creating an environment that makes everyone want to take care of their historic houses and a city government that values historic buildings through supportive laws and leadership is a vision that nearly any preservation group could stand behind.

Make Your Work Plan

Once your advocacy group has established strategic goals, your strategic plan should clearly lay out how your strategic goals will be accomplished. Your plan should answer these questions:

- What are the objectives for each of your goals?
- What are interim goals for reaching ideal results?
- What methods will you use to achieve these goals?
- Who will be responsible for the tasks associated with these methods?
- When will the various pieces of the plan be accomplished?

multiyear plan into annual plans that support a bigger-picture effort. Your annual plan can be tied to your annual budget and serve as a working document. This plan, often called a work plan, should fit in with all your board meetings and organizational discussions.

If advocacy is part of your group's mission, your strategic planning effort may suggest the need for a separate planning effort focused on preservation issues. During an issue-based advocacy planning effort, your group will identify and prioritize preservation issues and decide what action to take.

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