

# Strategic Planning Guide for Student Chapters



This document provides step-by-step instructions, examples and simple worksheets that help a student chapter develop a successful working plan for the upcoming year and beyond.

## **What is strategic planning?**

The process by which leaders of an organization (including successful corporations and businesses) come together to

- Envision the future
- Establish the goals
- Empower its membership to make decisions

HINT: Keep the three E's in mind; the whole thing will come together with ease!

## **What does strategic planning accomplish?**

- Ensures that actions and decisions are based on shared values and beliefs
- Clarifies goals and strategies in a measurable way
- Establishes a level of accountability for members

## **Why does the ASID Student Chapter need a strategic plan?**

- To promote positive energy for the chapter
- To integrate members thinking toward a common purpose
- To establish a framework for action

HINT: It's a HIP thing to do in the business world, and a great tool for the chapter too!

## **When should work on the ASID Student Chapter Strategic Plan begin?**

- After student chapter surveys have been tallied
- In the spring, after student chapter elections

## **Who should be involved in the strategic plan?**



- Board of the incoming student chapter (i.e., president, president-elect, secretary, treasurer)
- Any interested students
- Student chapter liaison from the professional chapter
- Student affairs chair from the professional chapter
- Faculty advisor

### **How should you begin the strategic planning process?**

Before beginning the actual strategic plan, get an idea of what the upcoming school year entails. By following the steps listed below, the planning committee will be able to see how much time will be available for ASID student events.

1. Conduct a membership survey
2. Get a blank calendar that covers the entire school year
3. Mark the beginning and end dates of each term – note dates of midterms, finals, etc.
4. Fill in all holidays, vacations and other days when school is not in session.
5. Fill in any special events or trips planned by your department
6. Mark the dates for events planned by your ASID professional chapter

### **Let's begin your strategic plan...**

#### **Step 1: Survey your student chapter members**

A fundamental part of the strategic plan uses feedback from ASID members. Surveys need to be conducted in the winter term, prior to elections. For help with creating a survey, refer to the document titled Student Chapter Survey Template found on the ASID Student Leadership Resources CD.

#### **Step 2: Conduct an Environmental Scan**

An environmental scan is a way to look at things beyond the chapter's control – economic, technological, political, cultural, social, demographic and environmental issues. Think of this as “the big picture.”

Take into consideration the community of the school, the community of the local professional ASID chapter and the town which your school is located.

**Example:** The effect that 9/11 had on business, the economy, etc.

**List the issues that are critical to your chapter:**

### **Step 3: Analyze the Situation**

#### **CONDUCT A SWOT ANALYSIS**

A SWOT analysis is a way to look at the things in the chapter that can be controlled – the internal situation and conditions of the student chapter.

Look at the chapter in terms of the following:

**Strengths** – what your chapter does well

**Weaknesses** – what your chapter does not do well or does not have the resources for

**Opportunities** – what opportunities do, or will, exist

**Threats** – what threats are facing your student chapter; how can these be turned in opportunities

Remember that every strength can become a weakness, every weakness a strength, every opportunity a threat and every threat an opportunity.

When conducting a SWOT analysis, you should ask the following questions in relation to your student chapter. The SWOT worksheet that follows will assist in the analysis.

- Who are the members of the student chapter?
- What are the capabilities and interests of the members?
- What are the chapter's financial and technological resources?
- What products (i.e., programs, events and services) can the chapter offer to members and the school?
- What are the talents of the members and what time constraints do they have?
- What are the workloads and outside work obligations of the members?



Use this worksheet to conduct a SWOT analysis of the characteristics of your chapter today

**Strengths** (what your chapter does well)

Example: Our chapter participates in successful designer showhouses.

**Weaknesses** (what your chapter may not do so well)

Example: The chapter meetings are not well attended.

**Opportunities** (what opportunities exist)

Example: We have strong industry representation in our area.

**Threats** (what threats or problems exist)

Example: We are an extremely small chapter.



#### **Step 4: Set Priorities and Define Specifics**

- What are the results of the membership survey and how can they be incorporated into the plan?
- What are the specific interests of the chapter as defined by the membership survey results?
- What can the ASID student chapter offer to its members?

#### **Step 5: Create a Mission Statement**

The mission statement describes the purpose of the ASID student chapter. It clearly says what your chapter is about and what it does. It also provides a template for the decision making of your chapter.

You can ask your chapter

- What function or purpose is being performed?
- Who are we serving by presenting this event or program?
- How will we be able to do this?
- Do we have enough people, time and/or funding?
- Does this further our purpose or what we do?

#### **Example: ASID Mission Statement**

ASID inspires and enriches its members and the interior design profession by providing indispensable knowledge, experiences and relationships.

#### **Your Chapter's Mission Statement:**

#### **Step 6: Develop Alternatives/Brainstorm**

Think of the many things your chapter can accomplish. Don't limit yourself to the obvious! Once you have several ideas written down, take the best of them and begin to develop your plan.

#### **Step 7: Make Decisions and Set Goals**

As designers, you know that design is a process of looking at all options and deciding which ones meet the needs of the client. Now you can look at the details, define objectives, strategies and tactics, and find the best way to get the job done.



## OBJECTIVES

Objectives are specific accomplishments you want to achieve within the year. For example, an objective might be to improve the relationship with our professional chapter, to develop programs that support the information needs of our student projects, or raise funds for a special trip. It's up to the Strategic Planning Committee. Always remember to refer back to the membership surveys as you go through this process.

**Example:** You want to get better grades this year.

## STRATEGIES

Strategies are how the objectives are achieved.

- Specific time frame
- Resources needed
- Measurable attributes

**Example:** You need to use time more efficiently and dedicate at least two hours per night for each project.

## TACTICS

Tactics are the actual plans for accomplishing the strategies. Choose people, define their jobs, determine their financial resources and give them deadlines and expectations.

**Example:** You decide to keep a journal of all assignments, purchase supplies ahead of time and have all work done three days before it is due.

## Step 8: Budgeting for Activities found in the Strategic Plan

It's time to determine how the chapter will fund its plan, based on estimated income and expenses. Use a spreadsheet or the simple template provided by ASID in this document to list the projected incomes and expenses so the committee can see what the chapter will be able to do with its funds. The chapter may need some fundraising projects to carry out programs for the members.

Allocate Resources: Prepare a Work Plan, or Budget

Use a spreadsheet for this part; Microsoft Excel works well. You don't have to be an accountant. You just need to understand some basic business principles; for instance, you can't spend what you don't have.



List what anticipated income might be here. Some of the following might be included:

- Beginning operating funds from last year
- Student chapter dues
- Money from fundraising
- Donations (from your school, industry, the professional chapter or alumni)

Next, take a look at the type of expenses the chapter might have. Remember that anything your chapter does should be referenced in the Strategic Plan. If it is not there, no money should be allocated without a revision to the Strategic Plan. This is done with the approval of your chapter board. For this exercise, list some expenses anticipated for your chapter.

- Administrative costs
- Travel
- Printing
- Postage
- Hospitality
- Speaker's fees

Your treasurer should then have two columns, one for “Budget (Income)” and one for “Actual (Expense).”

### **Step 9: Strategic Plan Review – Is It Working?**

Midway through the year, take a close look at the plan and evaluate how it is working for the student chapter.

- Are we accomplishing the objectives we set out in the strategic plan?
- Are we ahead of schedule or running behind?
- Are members' needs being served?
- Is the membership growing?
- Are we working with industry for programs, etc.?

Try to determine why things are happening as they are, both good and bad. Make notes on the progress to pass on to next year's committee. This allows the chapter to grow in strength and success, as well as increase membership.

In conjunction with the strategic plan review, compile semi-annual reports to be sent to your professional chapter and to ASID headquarters (found on the ASID



Student Leadership Resources CD). These reports are passed on to the ASID Education Department and the Student Advisory Council reps (ask your SRB for these names if you do not know them already). This information will be used to evaluate the effectiveness of programs, and to consider whether changes need to be made at the society level. It is your opportunity to share the student chapter successes and needs with ASID headquarters and with the Society's board of directors.



## STRATEGIC PLAN EXAMPLE – USE THIS AS A GUIDE AND REVISE TO FIT THE NEEDS OF THE INDIVIDUAL STUDENT CHAPTER

**Mission Statement:** Increase membership in our student chapter.

### Membership

OBJECTIVE 1 – Increase membership by 25 percent this school year.

strategy 1 – Plan and implement a membership drive.

TACTIC 1 – Send a membership packet to all freshman and transfer students at the beginning of each term. *(Budget line – no cost since ASID provides these document by request)*

TACTIC 2 – Hold a “Welcome Back/Welcome New Members” pizza party the second week of each semester. *(Budget line – allocate a dollar amount for food – expense)*

strategy 2 – Plan interesting programs for interior design students.

TACTIC 1 – Survey the ASID student members on the membership survey.

TACTIC 2 – Survey the remainder of the department’s students.

TACTIC 3 – Survey the faculty to determine benefits and levels of support.

TACTIC 4 – Ask the student chapter liaison to help plan programs using members of the professional chapter and Industry Partner representatives as speakers or hosts. *(Budget – can non-member students be charged a small fee to attend major meetings – income)*

### Public Awareness

OBJECTIVE 2 – Publicize the activities of the ASID student chapter in the school and community, emphasizing the educational and professional health, safety and welfare aspects of the events.

strategy 1 – Use the ASID student chapter newsletter and public relations committee to release the news. *(Budget – does the newsletter have any costs associated with it – expense, or advertising revenue – income)*

TACTIC 1 – Have a regular column in the university’s student newsletter.

TACTIC 2 – Send regular press releases and photos to the local newspaper and to your professional chapter.

TACTIC 3 – Invite the home editor or a home reporter from the local newspaper to serve as an advisor during planning for an event.



## Communication

OBJECTIVE 3 – Communicate on a monthly basis with the professional chapter.

strategy 1 – Send a monthly article to the professional chapter’s newsletter editor.

strategy 2 – Send the student chapter calendar of events and school dates to the professional chapter.

strategy 3 – Ask professional chapter members to act as advisors in the planning of events and programs.

## Community Service

OBJECTIVE 4 – Reach out to the community through service projects.

strategy 1 – Identify and contact service groups within the community.

strategy 2 – Survey chapter membership regarding service projects of particular interest.

strategy 3 – Appoint a student chair to serve as community liaison and to coordinate service projects.