

Strategic Planning

Regular strategic planning is a pooling best practice, as identified in the [Advisory Standards for Recognition](#).

Pools may engage in strategic planning in-house or they may find an experienced, outside facilitator helpful to fully engage all stakeholders in the strategic planning process. As you think about engaging a strategic planner, you might consider internal resource needs, your pool's specific strategic planning needs, cost, and the facilitator's overall qualifications.

A strategic plan or framework can serve both as a pool's work blueprint and progress assessment tool. Strategic planning should be done as necessary, but an annual or bi-annual cycle is generally accepted.

To effectively develop a strategic plan the pool's staff leadership and governing body should collaborate to define and approve goals and subgoals. Strategic goals may include items such as succession planning, membership growth, improved or additional services to meet future needs of the pool, surplus strategies, distribution goals, member relationship needs, and other critical operational items.

The strategic plan is most likely a living document. As the strategic plan is executed over time, the governing body should monitor progress to appreciate tactical adjustments when and where necessary. Strategic planning is just the beginning of an important process – implementation of the plan will be an ongoing project that will require the input of work teams and departments throughout your pool, as well as your governing body.

Internal resource needs

A pool's executive staff and governing body will need to be engaged during the strategic planning process. Preparation prior to the planning process should include input from departments and work teams throughout the pool. It's important to secure buy-in from all parties that will be responsible for meeting identified goals.

Specific strategic planning needs

To uncover your pool's specific strategic planning needs, you may consider some or all of the following questions prior to beginning.

Process

- Why are we beginning strategic planning now? What do we hope having an updated plan will do for our pool?
- What are the key questions or issues facing our pool that should be addressed through strategic planning?

- Has the Board discussed what they want to get out of planning and made a commitment to actively participate?
- Who are our stakeholders, how do we involve them, and what kind of input should they have?
- What is the best time of year for our pool to plan? Are there any major events to plan around?
- Are there any crises facing our pool right now that will prevent our staff and Board from being fully engaged in the planning process? If so, can we resolve these first?
- For what duration of time are we looking to plan?
- How will we track progress toward our plan?

Strategy

- What is our pool's mission, and how can we best meet that mission?
- What makes our [pool unique](#) and differentiates us in the market?
- How is our pool doing relative to competitors?
- Where is our pool now, and where do we want to be?
- What member demands, market trends or public entity risks impact where our pool wants to be?
- What are [trends in the pooling industry](#)? How will we evaluate those trends and determine which we need to be in front of?
- What are our pool's largest [threats or challenges currently](#)? What about the largest threats or challenges on the horizon?
- What areas are we willing to let go of, shed, or eliminate? What makes us sure those are the areas?
- What uncomfortable changes does our pool have to make in the next five years, if any?

Cost

The time you devote to the strategic planning process and the final work product you receive will impact the cost of facilitation. A best practice may be to set a budget and ask potential facilitators the scope of planning and resulting work outline they can provide within that budget.

Strategic planning firms

There are several strategic planning facilitators with pooling experience. Those known to AGRiP are listed below in alphabetical order by company name.

Select a partner that is the best match for your strategic planning needs and the resources you are able to expend. You might ask the following of the strategic facilitators you are considering:

- How is your fee established – upon what scope of work, using what techniques?
- What is the total project timeline for strategic planning activities?
- What kind of work product will you produce to guide us in plan implementation?

- Will you be available to us after facilitation is complete if we have questions through the implementation process?
- What inputs or deliverables are we specifically responsible for, or will we need to substantially contribute to?
- What are your specific qualifications for strategic planning facilitation? How many similar projects have you completed?
- How do you stay up-to-date in the area of strategic planning best practices, public entity pooling, insurance, or other related areas?
- What qualifications, methods, or practices make you right for this work?

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