



STRATEGIC PLANNING - Taking the Long View of Success

What Is Strategic Planning?

Strategic planning enables an organization to examine their internal workings and develop a vision for guiding it forward. It is an effort that prompts critical decisions and actions that shape and direct what an organization is, who it serves, what it does and why it does it, all with a focus on the future. Effective strategic planning spotlights not only where an organization is headed and the steps it should take to make progress, but also the metrics that define success.

“The importance of having a strategic plan is not to accommodate a new president, or new board member, or new leader, but to give an organization a goal and a task that all stakeholders need to step in and help implement.”—Tim Bower, Managing Director, NAEP

Client: National Association of Environmental Professionals (NAEP)

Established in 1975, the National Association of Environmental Professionals (NAEP) is a multi-disciplinary peer group representing environmental professionals in industry, government, academia, and the private sector. NAEP has more than 900 national members as well as 13 regional chapters.

NAEP’s Objectives in Pursuing a Strategic Plan

In the fall of 2014, NAEP began a strategic planning process, designed to build on the tenets of a successful 2008 effort. In approaching this new plan, the overriding sentiment among the organization’s leadership was that the process had to be conducted from as unbiased a viewpoint as possible, to ensure that the outcome reflected the true objectives of the organization and was not influenced by individual inclinations.

The Strategic Planning Process

TVD Associates was engaged to develop a customized approach to planning that best served NAEP’s ultimate goals, and capitalized on organizational strengths as well as effectively utilized its available resources. TVDA worked with a steering committee comprised to develop objectives for the planning process. The planning process itself was conducted in four parts:

1) Stakeholder Interviews

The process began with a series of one-on-one interviews, conducted by Todd Von Deak, TVDA’s President. Participants came from a cross-section of the NAEP membership. These interviews provided a deep understanding of how NAEP works and helped him hone in on the organization’s challenges.

2) Quantitative Research: Surveys, Data Analysis, and SWOT evaluation

TVDA fielded two surveys whose results fed into other research to enable the team to create a comprehensive environmental scan.



3) Primary Research

Along with the interview and survey processes, TVDA conducted its own primary research to better understand NAEP and its place in the professional landscape. This research included an in-depth review of NAEP-provided materials as well as information available from other resources.

4) Facilitated Planning Retreat

These efforts culminated in a day-and-a-half planning retreat with the NAEP board of directors, facilitated by Todd Von Deak. After presenting key findings from the preliminary research, Todd guided participants as they developed a core set of principles to guide the overarching development and subsequent implementation of NAEP's strategic plan. Todd also led the group in a collaborative exercise that resulted in the identification of four areas of focus that form the plan's "pillars."

From this planning retreat, Todd was able to prepare an initial strategic plan, and four months later he conducted another session with the NAEP board to fine-tune the plan and adjust the implementation that was already underway. NAEP is currently in the midst of implementing the plan and reports a heightened focus on strategic areas through all levels of the organization, and expansion of their volunteer pool and progress towards achieving their business goals.

In Their Own Words

"Quality work and someone I could trust is why I chose to work with Todd Von Deak. It just felt right. Todd was organized, positive, proactive, open and honest with our Board of Directors and me. He was able to assess quickly our organization, listened well, and was able to form opinions. At the end of the process, Todd was able to help NAEP define the right vision and strategic orientation for our future success."

Brock Hoegh, President, NAEP

From the very start of data-gathering phase, Todd was accessible, knowledgeable, and great to work with, always offering suggestions and going above and beyond what we expected. His excellent facilitation skills made our planning retreat more productive than we could hope, and coming out of it we had a firm draft of a plan that everyone, from our board to our volunteers and our staff, was thrilled with.

Tim Bower, NAEP Managing Director.

To Learn More

For almost two decades, TVD Associates has provided counsel on strategy and management challenges in the nonprofit and association arenas. Our consulting practice focuses on helping small- to medium-sized organizations leverage their available data for significant, and measurable, gains. Contact us today about your organization's needs and learn how developing a strategic plan might play an important role in improving your business.