

# Montana Association of Planners

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STRATEGIC PLAN 2025-2027

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## Executive Summary

Montana Association of Planners is committed to advocating excellence in planning that creates and sustains communities. Since its inception, the organization has continued to grow and, as a result, has dedicated time and energy to engaging in a strategic planning process. This process ensures the organization is meeting the current needs of its communities, its infrastructure capabilities, and the varied visions of stakeholders.

A strategic plan provides a structure for making decisions that have a more significant impact. It ultimately creates a framework for using available knowledge to prioritize work, allocate resources, and align stakeholders toward a shared vision. Montana Association of Planners board members participated in two strategic planning sessions that led to the creation of priorities to deepen its impact:



Keegan Flaherty of Flaherty Consulting facilitated the strategic planning process. The sessions provided significant insight into the Montana Association of Planners' unified vision and strategic direction. This document draws together the information into a draft strategic plan for the organization to be implemented over three years.

# Strategic Plan 2025 to 2027 Draft

## OUR MISSION

To advocate excellence in planning that creates and sustains diverse, active and engaged communities, economies and landscapes.

## OUR STRATEGIC PRIORITIES & GOALS

- I. **Strong foundation.** We commit to providing capacity, consistency, and legitimacy to the organization.
  - A. Hire staff to build capacity and maintain consistency.
  - B. Define and document organizational processes and procedures.
  - C. Grow membership by 10% to increase capacity and revenue.
  - D. Consistently communicate MAP wins to stakeholders.
  - E. Foster partnerships by leveraging APA chapter status
  
- II. **Quality education.** We commit to facilitating quality educational opportunities for members to improve community planning.
  - A. Facilitate quarterly educational opportunities that align with membership needs.
  - B. Promote professional development and skill-building opportunities for members.
  - C. Utilize LinkedIn to educate members and nonmembers about MAP and successful community projects.
  - D. Collaborate with affiliated professions to develop mutually beneficial relationships.
  - E. Clarify national and state membership procedures.
  
- III. **Influence policy.** We commit to creating a robust organizational framework to ensure planning is integral to developing land use policy.
  - A. Develop a 2025 legislative strategy to maintain momentum.
  - B. Collaborate with membership to identify future legislative priorities.
  - C. Build a communication framework process between the board, legislative committee, and members.

## Recommended Next Steps

1. Refine and adopt the strategic plan.

The consultant has provided a draft strategic plan and recommends that the Board of Directors refine and formally adopt after it is presented to membership in October.

2. Develop a monitoring and reporting plan for the strategic plan.

Often overlooked, the final component of strategic planning ensures that an organization creates a plan to monitor and evaluate progress toward the strategic goals. A monitoring plan enables Montana Association of Planners to discuss how the plan progresses and if any adjustments need to be made. A draft monitoring plan and strategic plan dashboard have been included in this report (see Appendices A and B).

3. Develop an operational plan for the fiscal year.

An operational plan describes how the Montana Association of Planners board and committees plan to deliver activities related to the strategic plan. The operational plan explains how employees plan to maintain organizational operations and outlines key activities over the fiscal year (see Appendix C). It is also linked to the strategic plan and budget. Afterward, a brief presentation to the Montana Association of Planners Board of Directors will educate board members on priorities for the coming year and the key outcomes that will be accomplished.

4. Develop a three-year budget and development plan that aligns with the strategic plan.

The strategic plan encompasses financial goals and adding an employee. As a result, the consultant recommends developing a three-year budget to break down income growth into more manageable goals.

# Appendix A: Monitoring Plan

## Overview

In 2024, Montana Association of Planners developed a three-year Strategic Plan to be implemented from January 2025 to December 2027. The Strategic Plan defines Montana Association of Planners' overarching strategic priorities over three years and long-term goals. The Monitoring Plan explains who is responsible for monitoring progress made by staff, board, and committees toward meeting the targets, tasks, and timelines defined in the Strategic and Operational Plans.

## Monitoring Plan

Staff, board, and committees will report their progress to the board president in implementing strategic plan goals. Progress reports will be brief and may or may not include a discussion of the individual tasks defined in the operational plan accomplished toward achieving each target.

The Board President will develop a brief progress report for the board of directors to review quarterly. The board of directors will discuss the strategic plan annually to determine whether the goals and outcomes are still relevant. Recommendations or changes will be shared with the Board President and disseminated to the appropriate staff and committees.

## Appendix B: Strategic Plan Dashboard

A strategic plan dashboard displays critical information in a concise, single location. Below is an example strategic plan dashboard for Montana Association of Planners to customize. Green means no significant risk to delivery, Yellow means some risk to delivery, and Red means significant risk to delivery.

<b>Strong foundation.</b> We commit to providing capacity, consistency, and legitimacy to the organization.		
Status	Goal	Update
	A. Hire staff to build capacity and maintain consistency.	
	B. Define and document organizational processes and procedures.	
	C. Grow membership by 10% to increase capacity and revenue.	
	D. Consistently communicate MAP wins to stakeholders.	
	E. Foster partnerships by leveraging APA chapter status.	
<b>Quality education.</b> We commit to facilitating quality educational opportunities for members to improve community planning.		
Status	Goal	Update
	A. Facilitate quarterly educational opportunities that align with membership needs.	
	B. Promote professional development and skill-building opportunities for members.	
	C. Utilize LinkedIn to educate members and nonmembers about MAP and successful community projects.	
	D. Collaborate with affiliated professions to develop mutually beneficial relationships.	
	E. Clarify national and state membership procedures.	
<b>Influence policy.</b> We commit to creating a robust organizational framework to ensure planning is integral to developing land use policy.		
	A. Develop a 2025 legislative strategy to maintain momentum.	
	B. Collaborate with membership to identify future legislative priorities.	
	C. Build a communication framework process between the board, legislative committee, and members.	

## Appendix C: Operational Plan Template

An operational plan describes how Montana Association of Planners plans to deliver activities related to the strategic plan. The Operational plan delineates tasks, timelines, and resources for completion and lists who is responsible for completing each task.

### Operational Plan Example A

Priority & Goal	Action Step	Timeframe	Lead	Resource Needs	Delivery Confidence
Foundation A	Develop a job description.	Q2 2025	President	Time	High
Foundation A	Create a three-year budget to determine employee pay and hours.	Q3 2025	Treasurer	Time	Medium
Foundation B	Create a list of useful policies for MAP.	Q1 2025	Board member	Time	High
Foundation B	Develop a timeline to develop policies and procedures.	Q2 2025	Board member	Time/\$	High

### Operational Plan Example B

**Priority:** Strong foundation

**Goal A:** Hire staff to build capacity and maintain consistency.

*Three steps to make it happen:*

- Create a job description.
- Draft a three-year budget to determine employee pay and hours.
- Draft an employee manual.

## Appendix D: Strategic Planning Notes

### Session One

Montana Association of Planners (MAP) board of directors and leadership staff engaged in a strategic planning retreat in May to develop a unified vision for MAP in the long term (five to ten years) and set a clear direction for the organization's future. The retreat was successful in achieving its goals, as participants engaged in meaningful discussions to define the vision. Below is a summary of the discussions and next steps.

### Current Landscape

Participants reflected on MAP's current assets and challenges to inform future strategy. Current strengths:

- Statewide planning niche
- Financially well resourced
- Board motivation
- Momentum
- Conference
- Legislative committee successes
- Membership depth and diversity of early to mid-career professionals
- Strong network and connections
- Strong relationships with other organizations

Current challenges:

- Organizational and leadership succession
- Administrative policies and procedures
- Board member capacity
- Increasing revenue
- Professional development beyond conference
- Consistent membership communication
- Lack of senior-level members
- Overlap with other organizations
- Perception of planning
- Increasing population
- Lack of planning degree in Montana
- Montana geography

Board members also discussed why MAP exists and identified the following essential purposes:

1. Legitimizes the planning profession
2. High-quality professional development education
3. High-quality legislative education and information

### Visioning

A vision is an organization's ultimate destination or guiding purpose. Participants broke into small groups to envision MAP in 2030, and the following themes arose:

- An executive director to add capacity to the organization
- Increased legislative influence

- Increased education opportunities and scholarships
- Increased revenue
- Consistent communication avenues
- National leadership representation

Next, participants discussed what MAP will look like in three years if it remains volunteer-led or hires an employee, as well as organizational risks in each scenario.

	0 FTE	.5 FTE	1 FTE
<b>Roles and responsibilities</b>	<ul style="list-style-type: none"> <li>- Status quo</li> <li>- MAP becomes more focused</li> </ul>	<ul style="list-style-type: none"> <li>- Administratively focused</li> <li>- Consistent communication</li> <li>- Conference planning</li> </ul>	<ul style="list-style-type: none"> <li>- Administrative</li> <li>- Fundraising</li> <li>- Increased education with fee for service</li> <li>- Legislative tracking and coordination</li> </ul>
<b>Organizational risks</b>	<ul style="list-style-type: none"> <li>- Regression and relevancy</li> </ul>	<ul style="list-style-type: none"> <li>- Board disengagement</li> <li>- Financial sustainability</li> <li>- Staff retention</li> </ul>	<ul style="list-style-type: none"> <li>- Board disengagement and loss of guidance</li> <li>- Financial sustainability</li> <li>- Retaining historical knowledge</li> </ul>

Upon discussion of the vision and future organizational scenarios, board members agreed that the organization is considering three priorities for the next strategic plan:

1. Strong foundation
2. Influence policy
3. Quality education

As a membership organization, the board of directors must be transparent about the strategic planning process and plan. Board members will present the current strategic plan accomplishments and 2025 to 2027 Strategic Plan to the membership at the October conference.

### Session Two

Montana Association of Planners (MAP) board of directors and leadership staff engaged in its second strategic planning session in August to define organizational priorities and measurable goals.

## Priorities and Goals

Strategic priorities are the main areas that MAP will concentrate on over the next three years. These priorities involve a coordinated, comprehensive approach that guides the organization's direction and resource allocation. Strategic goals are long-term, forward-looking, and actionable and directly link to MAP's mission, vision, values, and priorities.

Participants collaborated to define MAP's three priorities and three-year outcomes:

Strong foundation: Provide the organization with capacity, consistency, and legitimacy.

- Hire staff to build capacity and maintain consistency
- Define and document organizational processes and procedures
- Grow membership by 10% to increase revenue and capacity
- Consistently communicate MAP wins
- Build on partnerships by leveraging APA chapter status

Quality education: Facilitate quality educational opportunities for members to improve planning in their communities.

- Clarify national and state membership procedures
- Facilitate quarterly educational opportunities that align with membership needs
- LinkedIn to educate members and nonmembers about MAP and community projects
- Non-planning training and partners to promote professional development and skill building
- Sponsor and collaborate with affiliated professions

Influence policy: Create a robust organizational framework to ensure planning plays an integral role in developing land use policy.

- Develop a 2025 legislative strategy to maintain momentum.
- Build a framework process for communication between the board, legislative committee, and members.
- Collaborate with membership to identify future legislative priorities.

## Next Steps

After outlining the strategic plan, the following next steps were identified:

- Refine the strategic plan drafted by the consultant at the September board meeting.
- Present the strategic plan priorities to membership in October.
- Monica, Aaron, and Sara meet with Keegan in January to discuss operational technical assistance.