

Strategic Planning 101

Terms and Definitions

Strategic Planning – Strategic planning is an organization’s process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy.

Mission - The mission statement is the most important component of a strategic plan. It communicates the purpose of the organization to the external world and answers the question, “Why do we exist?”

Vision - The vision statement is the next big goal on the horizon - a goal that will assist an organization in achieving its mission. It is aspirational in nature and is meant to inspire those within the organization. It answers the question, “How will we be different 2-5 years from now?”

Values – Values are words or statements that list the core principles that guide organizational behaviors and influence its culture.

SWOT Analysis - A SWOT analysis gives you an accurate picture of the current state of the organization. It indicates the organization’s strengths, weaknesses, opportunities, and strengths when it comes to fulfilling the mission.

Goals and Objectives - Goals and objectives communicate how an organization is going to accomplish its mission. They provide direction on decision-making and resource allocation and give employees insight into how their work ties into the organization’s purpose.

Key Performance Indicators (KPIs) – KPIs are measurable metrics or data points that organizations use to evaluate their progress toward achieving specific strategic goals and objectives.

Action Items – Action Items are specific, time-sensitive statements about how goals and objectives are being pursued through the day-to-day activities of an organization.

Things to keep in mind:

- Pre-meeting surveys save time. When using a survey for the values component, it's helpful to provide a list of words (at least 35-40) to choose from. Include a couple of "other" options so participants can fill in their own.
- It is important to include all team members in the surveys whenever possible.
- Goals & objectives should be reviewed annually, at a minimum.
- Seat people in groups of 4 - 5, where applicable.
- Flip-charts, sticker dots and markers are your best friends.
- 80% rule! 80% rule! 80% rule!

Strategic Plan Template

Remember: A strategic plan compares where you are to where you want to be.

Introduction:

- When was the plan developed?
- Who was involved?
- What period does it cover?

Background (optional): Only include the relevant items.

- Brief history of the organization
- Organizational chart
- Board/Council information
- Community partners
- Brief description of the business

Mission

Vision

Values

SWOT Analysis Results (optional)

Goals and Objectives

KPIs/Action Items (optional)

Summary (optional)

DIY Mission Statement

1. Each participant individually answers the following questions:
 - What do we do?
 - Why do we do it?
 - Who do we do it for?
2. Discuss answers with others at the table. Identify 4-6 common ideas (1 to 5 words each).
3. Tables share ideas with the group as a whole. Document the ideas on flip chart paper and hang them at the front of the room.
4. Each person votes on 3-4 ideas by placing a checkmark or sticker dot next to the chosen ideas.
5. Each table drafts a statement based on the top ideas and documents it on flip chart paper. Hang them at the front of the room.
6. Each person votes on their favorite draft by placing a checkmark or sticker dot on the chosen paper.
7. In a group discussion, massage the wording of the statement with the most votes, but remember the 80% rule!!!!!!!

DIY Vision Statement

1. Each participant individually answers the following questions for the unit (not for the individual):
 - What is the biggest outcome you hope to achieve in the future (think 5-10 years)?
 - Where do you feel the majority of your resources should be focused?
 - Think about your ideal “customer”. What is the one thing you hope to be able to offer him/her (think 5-10 years)?
 - If a news article were written about you (think 5-10 years), what would be the focus of the article?
2. Discuss answers with others at the table. Identify 4-6 common ideas.
3. Tables share ideas with the group as a whole. Document the ideas on flip chart paper and hang them at the front of the room.
4. Each person votes on 3-4 ideas by placing a checkmark or sticker dot next to the chosen ideas.
5. Each table drafts a statement based on the top ideas and documents it on flip chart paper. Hang them at the front of the room.
6. Each person votes on their favorite draft by placing a checkmark or sticker dot on the chosen paper.
7. In a group discussion, massage the wording of the statement with the most votes, but remember the 80% rule!!!!!!!

DIY Value Statements

1. Each participant creates a list of 8 to 10 WORDS that answer the following questions:
 - What principles do we believe in?
 - What behaviors matter to us the most?
 - How do we treat people?
 - How do we want others to describe us and our work?
2. Participants combine lists to create one list per table.
3. One member per table calls out the lists as someone records the words on flip chart paper (do not record duplicates). Hang them at the front of the room.
4. Each participant reviews the final list and votes for their top 5 words by placing a checkmark or sticker by the words.
5. Circle the 4 - 8 words with the most votes.
6. Assign 1 word per table, and give them time to draft a value statement.
7. Tables trade drafts and make recommended revisions. Repeat until all words have been used.
8. Hang all drafts on the wall and again have participants review and vote using checkmarks or stickers. Aim for 4 to 6 value statements.

NOTE: You can then facilitate a group discussion about the wording, but beware!!!! Groups will get hung up on semantics. It is very important to keep the 80% rule in mind.

DIY SWOT

1. Review the mission statement.
2. Each participant creates a list of 5-10 answers to the question "In the context of accomplishing your mission, what are you doing well?" Push for 5-10, even if it takes a while.
3. Participants share their lists with their tables. Tables work together to create a top 4 list.
4. Top 4 lists are shared as a large group and recorded on flip chart paper. There will be some overlaps. Some can be combined. Ultimately, work together to finalize a list of 6 - 10 strengths.
 - Repeat steps 2 - 4 three more times, answering the following questions:
 - Weaknesses: In the context of accomplishing your mission, what are you not doing well?
 - Opportunities: In the context of accomplishing your mission, what are some known or potential opportunities that you could take advantage of?
 - Threats: In the context of accomplishing your mission, what are some known or potential threats that could keep you from being successful?

DIY Goals and Objectives

1. Choose one of the following options:
 - Identify 4 - 6 topical areas from the SWOT results.
 - Identify 4 - 6 topical areas from the mission statement.
 - Identify 4 - 6 topical areas from the daily work.
2. Give each table a topic and time to list ideas. Remember:
 - Everyone matters.
 - Be specific... kind of.
 - Defer judgment.
 - Shoot for quantity not quality.
3. Tables trade lists and are given time to add more ideas. Repeat as often as you'd like.
4. Hang lists on the wall and give each participant time to choose their favorite 2 - 3 per topic by placing a checkmark or a sticker dot beside the ideas.
5. Choose the idea per topic that has the most checks and assign it to a table until every table has an idea to work with.
6. Tables will rewrite the goal in a usable format, keeping SMART goals in mind. Add action steps as well. Repeat as many times as you'd like.