

Basic Steps for Strategic Planning

1. Getting ready
 - a. Clarify why you're doing this
 - b. What do you want to achieve?
 - c. How will this program be
 - d. Identify who should be involved in the process
 - i. Internal and external stakeholders
 - ii. Who do you want input from
 - iii. Who will help determine the plan elements
2. Mission
 - a. Short, memorable statement
 - b. Explains why your organization/unit exists
 - c. Expresses function and purpose
 - d. Universal: could be the same ten years from now
3. Values and Guiding Principles
 - a. The beliefs and ethics shared across the organization
 - b. The basic principles that guide your work
4. Assess Current State
 - a. Clarify the functional work
 - b. Look at effectiveness
 - c. Understand organizational climate
 - d. Assess context that the organization
 - i. What is the broader organizational situation/goals/mission
 - ii. What external factors affect your work and how
 - e. Consider tools like SWOT analysis, appreciative inquiry
5. Vision
 - a. Look at mission/values and comparing to current state
 - i. Where is there convergence; what is going well that you want to sustain
 - ii. Where is there divergence; what do you want to change
 - b. What will you look like in future
6. Goals/Priorities
 - a. Broad statements that relate to the vision/direction
 - b. Focus on areas of development
 - c. Keep the number manageable

7. Outcomes
 - a. Related to the goals
 - b. Measurable!
 - i. Identify existing data
 - ii. Identify new instruments or sources of data
 - iii. Clearly connect how that data illustrate outcome
 - iv. Direct and indirect measures
 - v. Benchmark where you are now
 - vi. Identify the change you want to see
8. Actions/Strategies
 - a. Specific functions, initiatives, activities
 - b. Assume will have effect on outcomes
 - c. Recognize the combination of actions will have effects
 - d. Develop a schedule or timeline
 - e. It's tough to prove a particular action caused something else, but you can infer
9. Measure Progress
 - a. Develop a schedule for data collection and review
 - i. Can be different for different goals and outcomes
 - b. Identify clear ways of articulating data (reporting)
10. Analysis and Reflection
 - a. Develop a plan for reporting data
 - b. Involve stakeholders in review of data
 - c. Determine level of progress towards goals
 - d. Determine strategies for change if needed
11. Informed Changes/Course Correct
 - a. Based on the findings from your analysis and reflection; show a clear connection between data/information and change
 - b. Might revision goals, outcomes, measures, or actions
 - c. Document these changes (e.g., revise plan)

Start all over again!