

# Simple Strategic Planning Guide

## About Strategic Planning

The purpose of strategic planning is to align an organization's priorities with its purpose, within its environment, and with the work it intends to perform and the results it wants to achieve.

Strategic planning is a process of gathering and analyzing information in order to develop broad goals which will drive future effort. The broad, long term goals of a strategic plan can be used to develop specific, shorter-term objectives.

Strategic planning supports transparency throughout an organization and with the community by providing an opportunity to gather feedback and offer clear direction in moving towards a shared vision of success.

## Important Terms

*Purpose:* Why an organization exists

*Mission:* What an organization does

*Vision:* What an organization would like to do

*Priorities:* Where an organization focuses effort

*Values:* What an organization believes (principles, philosophy, how to behave)

*Goal:* A desired result (broad and long term)

*Objective:* Specific and measurable action to achieve a goal

## A Transparent (*and Relatively Simple*) Strategic Planning Process

<i>Phase</i>	<i>Steps &amp; Actions</i>	<i>Considerations</i>
1) <b>Plan to Plan</b>	<b>Identify Stakeholders, Context, and Timeline</b>	<p><i>Stakeholders:</i> Who are your primary stakeholders? Who do you serve? Who are your partners? Who impacts and is impacted by your organization? Who will implement the plan?</p> <p><i>Context:</i> Which structural environment will your plan cover? Does the plan need to align with an organizational mission or vision? Does the plan need to align with other plans within or outside of your organization's hierarchy? Will departments or partners be developing goals or objectives based on your plan?</p> <p><i>Timeline:</i> What time period should the plan cover? How far in the future can you reasonably estimate or plan? How long should your planning process take? How much time can be devoted to planning?</p>
	<b>Build your planning team</b>	<p>Who should be involved in planning activities? Who will perform planning tasks? How will decisions be made? How will you communicate with your team? How often should you meet?</p>

## Transparent Strategic Planning Guide, cont.

	<p><b>Gather resources and example plans</b></p>	<p>Which existing plans, mission, vision and value statements, and other relevant documents need to inform your plan? Are there plans from other organizations you can use a guide in drafting your own plan? Are there plan templates or formats you like or will work well for your organization?</p>
<p><b>2) Engage and Gather</b></p>	<p><b>Develop your communications strategy</b></p>	<p>Who needs updates and information about your planning process? How often will you provide updates? How much of the process will you document and share? In what formats will you provide updates and announcements (social media, email, blogs, meetings)?</p>
	<p><b>Gather existing data</b></p>	<p>What existing <i>internal</i> data will you need to develop realistic goals? Do you have existing data on stakeholders, products, services, staffing, and usage? What existing <i>external</i> data will you need to develop achievable goals? Do you have access to forecasts and trends?</p>
	<p><b>Engage your primary stakeholders</b></p>	<p>What are your primary stakeholder's needs, priorities, and desired results? Can you engage with stakeholders via meetings, forums and surveys? How can you involve stakeholders in SWOT (Strengths, Weaknesses, Opportunities, Threats) or SOAR (Strengths, Opportunities, Aspirations, Results) activities?</p>
<p><b>3) Analyze and Draft</b></p>	<p><b>Analyze data and information gathered from stakeholders, then group and consolidate into several broad categories</b></p>	<p>Which needs, priorities, desired results or trends:</p> <ul style="list-style-type: none"> <li>❖ were common across stakeholder groups?</li> <li>❖ align with your mission or vision?</li> <li>❖ are critical to sustainability and growth?</li> <li>❖ reflect existing or desired capabilities?</li> </ul>
	<p><b>Draft an initial plan by turning the consolidated categories into broad, long term goals</b></p>	<p>Can you translate a broad category of needs, priorities, results or trends into a single desired result? How many goals can you reasonably achieve given your timeline? How much detail or information should be included in the plan?</p>

## Transparent Strategic Planning Guide, cont.

<b>4) Feedback and Presentation</b>	<b>Share initial draft plan for feedback</b>	How will you share the draft plan with stakeholders and your community? Can you allow for feedback on the draft via forums and surveys? How long will you allow feedback?
	<b>Incorporate feedback to finalize and share final draft of plan</b>	How will you incorporate feedback and changes into the final draft of the plan? Who will decide when the plan is finalized? How will the final draft be documented and shared?
<b>5) Implementation</b>	<b>Develop (and share) measurable and specific objectives for achieving the plan's goals</b>	What work, projects, or initiatives are needed to achieve each goal? Can you develop periodic (annual, quarterly) objectives for longer-term goals? Which internal stakeholders, staff, and departments should be involved in developing objectives? What is the timeline for developing and achieving objectives? Will you eventually incorporate objectives into your final plan? How will you share objectives with your staff and stakeholders?
<b>6) Assessment</b>	<b>Periodic review of plan and progress towards goals and objectives</b>	How often will you review your plan? How and how often will you assess progress toward goals and objectives? Will you share progress towards goals and objectives with your stakeholders? How will you handle any necessary changes to goals or objectives? How will you ensure continued alignment with other plans? When should you begin the next strategic planning process?