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!