

Strategic Planning Tips

SWOTs

The purpose of performing a SWOT is to reveal positive forces that work together and potential problems that need to be addressed or at least recognized.

An **internal analysis** helps you plan for the future by articulating how the organization operates right now. It can reveal trends, irregularities, limitations, and opportunities.

An **external analysis** helps you understand how the organization is perceived externally and what societal factors may affect its future. External factors may include things like the economy, funding trends, demographics, social factors, technology changes, competition, politics, regulatory factors, and public opinion.

SWOT might help you:

- Explore possibilities for new efforts or solutions to problems.
- Make decisions about the best path for your initiative. Identifying your opportunities for success in context of threats to success can clarify directions and choices.
- Determine where change is possible. If you are at a juncture or turning point, an inventory of your strengths and weaknesses can reveal priorities as well as possibilities.

Vision

Vision is a long range picture of how the “world will be” if you’re successful in your work.

Example: “Healthy individuals and communities free of alcohol and other drug problems.”

Mission

A mission is at the core of why you’re doing the work you do. A mission statement reflects purpose and may include some strategy reflection. Crafting a good mission statement can be challenging. Sometime it is helpful to seek consensus on core elements, and then have volunteers later put the core pieces together for the group’s later review.

Examples:

1. The mission of the Scripps Ranch Civic Association is to serve, promote, and protect the community interests of Scripps Ranch through volunteer efforts; to identify and evaluate needs, disseminate information, and take appropriate action to support Scripps Ranch organizations with the common goal of improving the quality of life in our community.
2. To lead California’s strategy to reduce alcohol and other drug problems by developing, administering, and supporting prevention and treatment programs.

Values

The organization's values govern its conduct with society at large, members, and local community. They are statements about how the organization will value customers, suppliers, and the internal community.

Examples:

1. Justice demands that everyone, regardless of disability, has the right and responsibility of full participation in society.

Or key words that express values

2. Ambition, competency, individuality, equality, integrity, service, responsibility, accuracy, respect, dedication, diversity, improvement, enjoyment/fun, loyalty, credibility, honesty, innovativeness, teamwork, excellence, accountability, empowerment, quality, efficiency,

Goals

Goals are broad statements of what the organization needs or wants to achieve in the medium long-term. Goals should reflect the underlying reason for running the organization.

Definition: Goal: Goal is the end toward which the program is directed. It is the general statement of a long-range purpose. Goals should directly address needs. Goals are outcome and not process oriented. They clearly state, specific, measurable outcome(s) or change(s) that can be reasonably expected at the conclusion of a selected intervention.

Examples:

1. To improve community-based care in Prince William County
2. To encourage the growth of consumer advocacy and self-help groups.

Objectives

Objectives basically address the difference between where we are (current status), and where we want to be (vision and goals), by spelling out what we do (target objectives and action plans) to get there. Objectives are specific, measurable results produced while implementing strategies.

Definition: Objective: Objective is a statement of the results to be achieved, and includes a time frame, target of change, specific results to be achieved, method of measuring the results, and criteria for successful achievement. Objectives state results, not activities. Objectives, when accomplished, lead to the goal. Objectives should be stated in ways that describe what you will do and how you will do it. A performance indicator is an example of a program objective.

Examples:

1. By 2016, the number of 8th graders using marijuana will decrease by 20%.
2. By 2010, the percentage of 8th graders that report that they resisted pressure to use meth will increase by 10%.
3. To achieve an annual budget of \$10,000 in three years.

Key Strategies

Strategies are the rules and guidelines by which the mission, goals, and objectives may be achieved. How will we accomplish our objectives? They can cover the organization as a whole or they can relate to more specific matters.

Examples:

1. Conduct fundraisers and explore revenue streams
2. Create a new service to help youth development over the next year

Action Plan

A few tips about Action Plans:

- Organize the overall strategic plan into smaller action plans for each objective.
- Specify who is doing what and by when.
- While these may be separate documents, keep them linked in everyone's mind.
- Build in regular reviews of status of the implementation of the plan.
- Translate the strategic plan's actions into job descriptions and personnel performance reviews, especially for key leaders.
- Communicate the role of follow-ups to the plan. If people know the action plans will be regularly reviewed, implementers tend to do their jobs before they're checked on.
- Be sure to document and distribute the plan, including inviting review input from all.
- Be sure that one internal person is identified as the lead in managing implementation.
- Integrate the plan's goals and objectives into the chief executive's performance reviews.