

THE STRATEGIC PLANNING PROCESS

1. **Conduct an environmental scan.** Review your organization's strengths and weaknesses. Reflect on the community and broader environment in which your organization operates to identify the opportunities and threats that it faces. Determine the community's assets and needs, specifically those of current/potential populations that you'll try to reach.
2. **Identify key issues, questions, and choices to be addressed.** Specify "strategic issues" that your organization should address and set priorities in terms of time or importance. Strategic issues emerge from the data and environmental scan.
3. **Define or review the organization's values, community vision, and mission.** Reach consensus on why the organization exists, what goals or outcomes it seeks to achieve, what it stands for, and whom it serves. Begin your strategic planning by agreeing on the following:
 - **Organizational core values or operating principles** – those beliefs/principles that guide the organization - these are shared, strongly held, and not easily changed.
 - **Community Vision** – the vision for your community - an image of what it would be like if your values were shared and practiced by everyone.
 - **Mission** – the stated purpose for your organization's existence; the contribution it promises to make to help accomplish the community vision.
4. **Transform the vision and mission into a series of key goals for your organization**
5. **Agree upon key strategies to address strategic issues and reach goals.** The emphasis should be on broad strategies, including current/new collaborative approaches that are related to specific goal(s). The process requires that you look at where the organization is now, where its vision and goals indicate it wants to be, and identify strategies to get there. Specific criteria for evaluating and choosing among strategies should be agreed upon, such as the following:
 - **Value and Appropriateness** – Is the strategy consistent with your organization's mission, values, operating principles, and agreed-upon goals?
 - **Feasibility** – Is the strategy practical given current personnel, financial resources and capacity?
 - **Acceptability** – Is the strategy acceptable to your stakeholders?
 - **Cost-benefit** – Is the strategy likely to lead to benefits that justify time, costs and other resources?
6. **Create an annual action plan that addresses goals and specifies objectives/work plan.** Once long-term elements of your strategic plan have been developed, create a specific work plan for implementation. Its strategies should reflect current organizational/environmental conditions. Objectives should be measurable and time-based. Under these or other agreed-upon criteria, strategies can be evaluated, prioritized and chosen.
7. **Finalize a written strategic plan that summarizes your decisions.** Be sure to include the outputs of each major step.
8. **Build in procedures for monitoring and modifying strategies.** Monitor the progress towards goals, objectives and strategies and revise your plan based on progress made, obstacles encountered and the changing environment. Acknowledge and take advantage of unexpected changes, such as more sympathetic elected/appointed officials, economic improvements, and changes in funder priorities or the priority population.

Adapted from Mosaica, 2001. Accessed February 21, 2012 at http://siteresources.worldbank.org/INTAFRREGTOPTEIA/Resources/mosaica_10_steps.pdf

STRATEGIC PLAN FORMAT

- I. INTRODUCTION:** Need for a strategic plan and how plan was developed.
- II. ENVIRONMENTAL SCAN:** Organizational history, structure, strengths and weaknesses;
external environment, pertinent data, opportunities and threats
- III. ORGANIZATIONAL VALUES, VISION, AND MISSION**
- IV. GOALS, PRIORITIES AND PLANNED STRATEGIES**
- V. MONITORING/REVIEW:** Monitored progress; plans for review and refinement
- VI. ANNUAL PLAN** (may be prepared separately)
- VII. ATTACHMENTS:** Environmental scan and other supporting information