

Developing a Strategic Plan

The following basic process outlines how to develop a strategic plan:

1. Determine who will be involved in the process.
2. Determine if the focus of the plan will be issue-based or goals-based.
3. Determine the scope of the planning process.
4. Determine a timeline for the planning process.
5. Select a facilitator – preferably someone who is objective and impartial.
6. Identify or confirm your purpose or mission statement – concise statements that describe why your organization exists, its reason for being. The statement should describe the customer or community needs to be met, for whom, and how.
7. Conduct a brief internal and external assessment – what's going on?
 - Identify SWOTs – Strengths, Weaknesses, Opportunities, and Threats.
 - Consider surveying constituents and stakeholders for their opinions and ideas by using a written questionnaire or evaluation.
8. Identify, list, and prioritize the major issues and goals the organization must reach if it is to accomplish its purpose. Common categories include finance, administration, facilities, products and services, sales, customer satisfaction, marketing/advertising, partnerships, and personnel/staffing.
9. Establish action plans and strategies to address major issues and goals– objectives/targets, actions, resource needs, timelines, roles and responsibilities.
10. Develop a written planning document that can be used to track progress, record results, and communicate status to stakeholders.
11. Coordinate the strategic plan with the budget process, e.g. staffing increases/decreases, purchases, sales, etc.
12. Implement, monitor, and update the plan:
 - Expect the board of directors and committees to use the plan as a guide for their responsibilities and work, and to report on their progress.
 - Refer to and review the status of the plan at board and committee meetings.
 - Regularly review, assess and refresh the plan so that it becomes a living document (be sure to keep an archived copy of the original plan).
 - Regularly dedicate time to work on the strategic plan.

SWOT Analysis

Map your organization's strengths, weaknesses, opportunities and threats.

Strengths – internal factors that allow an organization to take advantage of opportunities and excel in the marketplace

Weaknesses – internal factors that stand in the way of an organization taking advantage of opportunities or excelling in the marketplace

Opportunities – real or potential external situations and conditions that an organization could take advantage of, given the right circumstances and planning

Threats – real or potential external situations and conditions that could limit an organization's effectiveness and competitiveness, if not dealt with in a pro-active manner

Internal	External
Strengths	Opportunities
Weaknesses	Threats

Important – allow time to step back to evaluate and validate the SWOT analysis before going forward with strategic planning.