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Strategic Planning Process

1. Plan To Plan (Steering Group)

Planning work should be organized by a small group that includes the organization's chief executive officer and representation from the board.

2. Form Planning Group

The Planning Group should include representation from all stakeholders in the organization.

3. Environmental Scan (Steering Group, Staff or Consultant)

Gather together existing information and develop any needed information about the environment that affects the operation of the organization. The internal environment consists of the organization's heritage and culture, current structure and services, constituents (strengths and weaknesses); the external environment includes those factors external to the organization that are likely to have an impact on the operation of the organization: competitors, trends, rules, laws (opportunities and threats).

4. Conduct Planning Retreat (Planning Group with Facilitator)

- Situation Analysis

  Review the information that has been gathered.

- Create a Shared Vision

  The vision of what the organization will be like at some point in the future when it is functioning as it could and should be functioning, i.e. when it is doing the right things the right way.

- Create or Review Mission, Core Values

  Mission is the essential reason the organization exists. Values are how it aspires to behave.

- Discuss Strategic Issues

- Establish Goals (Strategic Directions)

  The goals are based upon what it is that the organization needs to do in order to realize the future vision.

- Organize Task Forces

5. Develop Action Plans

The Task Forces should clarify the goal(s), for each goal identifying strategies (action steps), and for each strategy identifying who should be responsible for seeing that it is accomplished, how they should do it, by when, and how they will know when it has been accomplished.

6. Approve Plan

The Board is responsible for final approval.

Adapted from material developed by Dr. Carl M. Moore, Kent State University