A 6 Step Process for Strategic Planning



Prepare and Plan

Bring together a planning team to develop a timeline, gather existing plans, background information and reports



Analyse our Position

Gather, organise and analyse information about the organisation. Identify our existing and potential stakeholders, partners and current activities and services. Undertake an environmental scan and a S.O.A.R Analysis



Build our strategy

Take time to review or develop our Vision, Mission, Purpose and Values. Develop our Objectives and the key strategies to achieve them.



Develop our Action Plan

Identify the actions that support our key strategies. Set action timeframes, nominate responsibility for the action and develop measures of success.



Implement our strategy

The key to the success of our strategy is sharing and communication. All teams, programs and services should support the Strategic Plan.



Monitor & Evaluate

Establish regular checkpoints to identify what's working, what's not, and what needs adjusting. Evaluate progress and update annually.



Strategic Planning Tools

S. O. A. R. Analysis

Strengths

What makes us proud?
What are our greatest
achievement?
How do we use our strengths
to get results?
How do our strengths
contribute to the organisation?

What do we care deeply about?
What strategic initiative would support our aspirations?

Aspirations

Opportunities

What are our opportunities?
What is community asking for?
What are the top 3
opportunities to focus on?
What new initiatives are
possible?
Are new skills needed?

How do we know we are making a difference? How much do we do? How well do we do it? Is anyone better off from our work?

Results

MISSION

Our How!

What do we do? Whom do we serve? How do we serve them?

Today – Focussed on Now

Stakeholder Engagement

Map our Internal & External stakeholders / partners (existing & potential)

Who should be part of the Strategic Planning process? How do we invite them into the process?

Identify mutual opportunities.

Vision

Our vision is our why.
It states the change we
believe we can make in
the world.

Mission

Our mission is our how. It describes the work as we work toward our vision.

Purpose

Our purpose describes our reason for being. It describes the reason or reasons we exist.

Values

Our values describe who we are. They speak to our core beliefs and principles

VISION

Our Why!

What are our hopes & dreams?
What problem are we solving for
the greater good?
What are we aspiring to
change?

Tomorrow – Future Focussed

Political

Economic

Environmental

Scan

What is happening around us that may influence our plan?

Technology

Social