

[The Organisation]

STRATEGIC PLANNING WORKBOOK

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STEP 1A EXTERNAL ASSESSMENT

To identify and assess changes and trends in the world around [The Organisation] that are likely to have a significant impact on it over the next 5-10 years.

We then determine which changes are opportunities for us (for example, opportunities to grow) and which could be threats to us in some way (trends that can keep us from being successful).

Finally we identify implications for selected changes and trends -- ways the [The Organisation] might respond to the opportunities and threats we identify. (Saying that something is an implication does not require the [The Organisation] to adopt that course of action.)

	Trends	Opportunities	Threats	Implications
Political,				
Economic,				
Technological,				
Social,				

	Trends	Opportunities	Threats	Implications
Lifestyle,				
Demographic,				
Competitive,				
Legal,				
Philanthropic trends.				

STEP 1B MARKET ASSESSMENT

To identify and assess changes in the needs and perceptions of the [The Organisation]'s markets and constituencies.

For most nonprofits, these include clients or consumers of services, funders, and donors, volunteers, paid staff, board members, collaborators, and competitors.

The market assessment attempts to answer the following questions:

1. Who are the [The Organisation]'s key markets and constituents?
2. What are the needs, perceptions, and service expectations of each market?
3. What are the emerging market trends?
4. What are the implications for the [The Organisation] -- how should the [The Organisation] respond to these changes and trends in its markets?

Key Markets / Stakeholders	Needs, Perceptions & expectations	Emerging Trends	Implication for [The Organisation]

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STEP 1C INTERNAL ASSESSMENT

To assess internal structure, process and operations of the [The Organisation] and based on this assessment, to pinpoint strengths and weaknesses.

	Strengths	Weaknesses	Implications
Personnel (paid and volunteer),			
Fundraising,			
Physical facilities,			
Equipment,			

	Strengths	Weaknesses	Implications
Use of technology,			
Location,			
Financial condition,			
Management,			
Board governance,			

	Strengths	Weaknesses	Implications
Special programs/ services,			
Markets,			
Market position,			

STEP 2 CRITICAL STRATEGIC ISSUES AND CHOICES FACING THE [THE ORGANISATION]

To identify critical strategic issues facing the [The Organisation].

Critical issues are fundamental policy or program concerns that define the most important situations and choices [The Organisation] faces now and in the future.

Critical issues can reflect long-standing problems within the organisation, the community served or recent events that are anticipated to have a significant impact on the [The Organisation] and/or community served. Critical issues can also reflect major shifts in thinking that challenge "business as usual".

The selection of issues is important because it determines range of decisions the [The Organisation]'s leaders will consider in the future.

In some instances, you will be already aware of the critical issues that the strategic planning process must help it address. In most situations, the planning process participants discern critical strategic issues as they work on the external, market and internal assessments.

In developing the actual wording of the critical issue statements, it's helpful to reflect on the following:

- *The external changes and trends having the greatest positive and/or negative impact on the [The Organisation] . . .*
- *Major changes and trends in the needs, perceptions and service expectations of our markets and constituencies . . .*
- *Internal strengths and weaknesses of the [The Organisation] that will seem to have an impact on our future success . . .*

CRITICAL ISSUES FOR [THE ORGANISATION]

1.

2.

3.

4.

5.

6.

This chart illustrates the flow from "Critical Issues" to "Vision" to "Goals" to "Strategies" as a logical progression of thought in the strategic planning process.

PLANNING LEVELS	EXAMPLES OF EACH LEVEL
<p>CRITICAL ISSUE: Fundamental policy or program concerns that define the most important situations and choices [The Organisation] faces now and in the future. Critical issues can reflect long-standing problems in [The Organisation], the community served or recent events that are anticipated to have a significant impact on the [The Organisation] and/or community served.</p>	<p>How do we expand our funding base to keep up with present and future needs</p>
<p>GOALS: 3-5 years out Broad statements of what the [The Organisation] hopes to achieve in the next 3 years. Goals focus on outcomes or results and are qualitative in nature.</p>	<p>Expand the agency-funding base to support anticipated growth in our programs and services.</p>
<p>STRATEGIES: 1-5 years out Statements of major approach or method for attaining goals and resolving specific issues.</p>	<ol style="list-style-type: none"> 1. Generate more revenue from programs. 2. Expand individual annual campaign giving. 3. Increase corporate giving
<p>OBJECTIVES: 1 year out Specific, concrete, measurable statements of what will be done to achieve a goal generally within a one-year time frame.</p>	<p>The Program Services Department will generate at least \$285,000 in revenue from program service fees by December 31, 2004.</p>

STEP 3 STRATEGIC VISION

To review the Strategic Vision statement for [The Organisation] to ensure that it provides direction and inspiration for our goal setting.

A vision is an image or description of the [The Organisation] we aspire to become in the future. It answers the question “*If we could create the [The Organisation] of our dreams and have the impact we most desire, what would it look like in the Year 2010?*”

The vision focuses on what we intend to BE - our hoped for destination, not what we will be DOING in the Year 2010.

It should also indicate in what significant ways we will be different from what we are today. If the critical strategic issues represent our effort to express the big questions, choices and challenges facing the [The Organisation] in the future, the vision is our attempt to communicate the big answers to these big questions. The strategic vision statement.

(PLEASE NOTE: Although the words “mission” and “vision” are used interchangeably, they are distinct in an important way: Mission describes “general purpose”; Vision describes “future direction”).

[THE ORGANISATION]'S VISION STATEMENT

*For our people to be empowered to develop full economic and social independence in the same way as other
Australians and that the rights' visions custom and identity are recognised and preserved.*

STEP 4 MISSION

To develop [The Organisation]'s mission statement.

The mission statement is a broad description of:

- What we do,
- With/for whom we do it,
- Our distinctive competence, and
- WHY we do it (our ultimate end).

Some questions that can aid in the review of any mission statement:

Questions for a Critical Review of Mission Statement

1. Is the mission statement clear and on target in today's operating environment?
2. Do you have any specific questions or concerns with respect to the mission statement?
3. Does the mission statement duplicate the mission of any other organisation? If so, what should we do about it?
4. Considering the answers to these questions, how, if at all, should the mission statement be changed?

[THE ORGANISATION]'S MISSION STATEMENT

STEP 5 GOALS

To develop strategic goal statement consistent with the vision statement.

Strategic goals are broad statements of what the [The Organisation] hopes to achieve in the next 3 years. Goals focus on outcomes or results and are qualitative / measurable in nature.

[THE ORGANISATION]'S GOALS TO 2008

1

2

3

4

5

STEP 6 STRATEGIES

To develop strategies for each goal.

Strategies are statements of major approach or method for attaining goals and resolving specific issues.

Ideas for strategy emerge from the earlier internal, external and market assessments, -- especially the strengths and weaknesses identified in the internal assessment as well as the implications statements developed as part of the market and external assessments.

A strategy is judged potentially effective if it does one or more of the following:

1. Exploits environmental opportunities
2. Corrects our shortcomings
3. Defends against environmental threats
4. Offers some basis for future competitive advantage
5. Leverages our competencies
6. Counteracts forces eroding current competitive position

GOAL	STRATEGIES
1	1.1
	1.2
	1.3
	1.4
2	2.1
	2.2
	2.3
	2.4

GOAL**STRATEGIES****3****3.1****3.2****3.3****3.4****4****4.1****4.2****4.3****4.4****5****5.1****5.2****5.3****5.4**

