**Elements of Strategic Planning**

**For Communities and Organizations**

The purpose of a strategic plan is to determine where you are, define where you want to be, and clearly state how you will get there. There is no set format for strategic plans, but most approaches to strategic planning include these elements, in one form or another:

**1. The Big Picture**

A plan should include a vision, mission, or other expression of the long term purpose or outcome desired.

**2. Background**

A good plan takes into account the various forces and historical events that have taken place and how they have contributed to the current circumstances.

**3. Environmental Scan**

A plan should consider the current conditions, both internal and external. Needs assessment, asset mapping, and SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) are among the approaches that may be used.

**4. Focus Areas**

Key focus areas should be identified and might be developed as goals to work toward or critical issues to be addressed.

**5. Indicators**

A good plan will address benchmarks, objectives, outputs, or other measurable outcomes that can be used to track progress.

**6. Strategies**

The core of the plan describes what will be done, how, by whom, when, and with what resources. Timelines and budgets are part of this.

**7. Evaluation**

A good set of indicators (see above) will make the process of evaluating the progress of the plan a relatively straightforward process.

A strategic planning process must be designed to fit the purpose. It will be different for a community, an organization, or an institution. It will also vary according to the scope of the plan, the number of people involved, and the time available for the planning process. These elements should be determined at the beginning, and the necessary time and resources must be committed, or the planning process will need to be revised.

**Goals and Objectives**

These terms can be confusing, and are often used interchangeably. For strategic planning purposes, it may be useful to distinguish between them as follows:

*Goals* are those things you will continue to work toward. For example, “We seek to improve education in our community.” The work of improving education will never be finished, since further improvement can always be sought. So, the goal defines a direction in which to move, but not an endpoint. Because they are never “finished” goals for a community or an organization often don’t change over time.

*Objectives* are concrete outcomes that can be measured and tracked in a specific time frame. For example, given the goal above of improving education, one objective might be “To increase by 10% the number of high school graduates going on to college over the next five years.” Strategies can be developed to meet this objective and the success of these strategies can be determined with clear measures, both along the way and at the end of the specified time frame.

It may be useful to distinguish between “outcome objectives” such as the example above and “process objectives.” Process objectives only measure how a strategy has been implemented, for example: “We will hold five college fairs this year.” Although it is measurable, this type of objective will not tell you whether this strategy resulted in more students going on to college.

**Benchmarks**

Evaluating success in meeting objectives requires developing “benchmarks” or data that measure the present situation. For the education objective above, you would need to know the current percentage of high school graduates who go on to college. It would also help to have historical data so you could determine how the objectives you have set fit with current trends, and perhaps also data from other communities. This will help you to develop goals that are sufficiently ambitious without being unrealistic.

**A “Living Plan”**

Good plans shouldn’t sit on the shelf. They need to be implemented, evaluated, revised and updated. You may want to put your plan in a three-ring binder so it is easy to add new elements as the process moves forward.

**Another Approach**

Dr. Vaughn Grisham of the University of Mississippi suggests that a “task force” approach may be well suited to some planning processes. In this approach, key issues are identified and then task forces are formed around these issues. Instead of spending a lot of time planning, the task forces begin work right away with small projects that will yield immediate results. The further steps in the plan are developed by the task forces as they proceed.

**Time and Commitment**

It may be hard to find the time to develop a strategic plan, but a clear plan will pay back the investment of time in the long run. A good, inclusive planning process will also help to generate the necessary commitment from all the people needed to turn the plan into reality.