



Inspiring Solutions to Thrive

Strategic Planning Worksheet

Strategic planning is an organization's process for defining their strategy so that they can accomplish specific goals and objectives. This worksheet will take you through the components of what a good plan should contain. Your full plan can have more of a narrative to give it body, this worksheet will help flesh out the components of your plan.

VALUES: Values are enduring, passionate, and distinctive core beliefs. They're guiding principles that never change. Here you are going to brainstorm approximately 10 words, these words will form the foundation of your plan. Use the blank space below to write down 8-10 words that describe what is important to and about your organization, why was it formed? To accomplish what? Are there any must have's for your organization?

MISSION: A mission statement articulates the purpose of your organization. It tells both existing and potential members what the organization hopes to accomplish in a simple and concise way. Your mission statement is a statement that you can refer back to, to guide all decisions.

What is the purpose of your organization? _____

How will you accomplish this purpose? _____

Write your Mission Statement:

VISION: A vision is about the big picture. In the next 3-5 years what does your organization hope to accomplish. Dream big here.



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GET INPUT: To inform your plan it is important to receive input both internally in your organization and externally from your Stakeholders.

IDENTIFY YOUR STAKEHOLDERS: Identify those people and/or organizations that are impacted by your organization, this is the external group that you need to get input from.

List them here:

- 1.
- 2.
- 3.
- 4.
- 5.

There are many ways to get input from your Stakeholders, you can hold focus groups, you can do in person or online surveys or you can do interviews. The important part about getting input is that you are consistent in your questions. List below 3-5 questions that will help you to receive input that can inform your strategic plan.

Once you have external input, it is time to get internal input. This is accomplished through the facilitation of a SWOT Analysis. A SWOT analysis informs you of your Strengths, Weaknesses, Opportunity and Threats. Doing this in a group is helpful to compare similarities and differences. List them below:

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS



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Creating the Plan

Now that you have identified your purpose, created your mission statement, developed a vision, identified your stakeholders and received feedback, it is time to form your plan. If you wish you can include the history of your organization and/or an executive summary. A narrative about how the plan was created, including who you received feedback from can also be part of the plan. What is important is that the plan becomes a tool for you to use over the next 3-5 years.

Your plan starts with a list of your values or a value statement, your mission statement and your vision. Then lists 3-5 Goals and the actions you are going to take to accomplish those goals.

Great goals are outcome focused, in line with your values and SMART-Specific, measurable, action oriented, realistic and time bound.

GOAL	ACTION ITEMS	WHO IS RESPONSIBLE	WHEN COMPLETED

When your plan is complete and has received any necessary approval make sure to distribute it and/or make it digitally accessible. Making the plan public creates accountability. You can revisit it and report on what has been accomplished and how.