

## OVERVIEW OF KEY STEPS IN STRATEGIC PLANNING

- Collecting information about organizational strengths, weaknesses, opportunities, and threats and using them as a base of information for planning
- Developing agreement on the underlying values or operating principles that should guide all the activities of the organization
- Agreeing on the community vision towards which the organization is working
- Reviewing, and if necessary revising, the organization's mission – does the mission represent the organization's public promise of what it will do to help make its vision real?
- Agreeing on the organizational vision for the organization
- Agreeing on goals and key objectives and outlining strategies for the effective use of staff and Board resources
- Developing action plans for staff and Board implementation of the strategic plan
- Developing plans for monitoring the implementation of the strategic plan

Glossary of Organizational Planning Terms	
Term	Definition
Constituency	The people your organization cares about, serves, and is accountable to
Core Competencies	The skills and abilities you must have within your organization, among Board, staff, and volunteers
Criteria	Standards based on your values and mission that help you to decide what you will and will not do, and to set priorities
Goals	The long-term (three-to-five-year) accomplishments that advance your organization towards achieving its mission
Identity	How you think of yourself and how others see you as an organization; identity is shaped by your organizational values, vision, and mission
Mission	The stated purpose for your organization's existence; a statement of the contribution your organization is promising to make to advance your world (or your community) towards the vision – your organization's public promise
Objectives	Measurable results your organization wants to accomplish, usually within the period of a funded project or a strategic plan
Outcomes	The measurable benefits or other results (positive or negative) for clients that may occur during or after program participation
Outputs	The direct products or volume of program operations, such as the number of service units a program or organization provides to its clients or beneficiaries
Positioning	How you choose to present your organization to and interact with the external world (funders, partners, politicians, etc.), so that you can progress towards your goals and be in agreement with your identity
Strategic Directions or Strategies	The paths, approaches, and methods you use to reach your vision while being sure that your actions are consistent with your values
Targets	Individuals or entities towards whom you direct your public education and/or advocacy activities (e.g., elected officials, appointed officials, school board)
Values/Principles	The beliefs or principles you hold dear; your internal guidelines for distinguishing what is right from what is wrong, and what is just from what is unjust – these principles are held tightly and are not changed or swayed by external forces
Vision	Your image of what the world (or your community) would look like if your values were in practice