Strategic Planning: Maximizing Your Organization's Impact

Step One: Review your Mission, Vision, Core Values, and Root Beliefs (MVCVRB).
If you don't yet have MVCVRB, work through drafting some ideas. Feel free to ask for a copy of our worksheet for building MVCVRB if you don't already have one.

Step Two: Assess the state of your organization, its programs, and services.

- What is working?
- What is not?
- Where are the new opportunities?
- What is threatening your culture, mission, and vision?

Step 3: Eliminate things that don't align with your MVCVRB.
(policies, processes, programs, services, actives, routines, and day-to-day operations)

Step 4: Establish goals that drive Mission fulfillment.

- What is our organization aiming to achieve? (focus 1-3 years out)
- How can we reinforce our purpose and priorities through goal setting?
- How will we communicate our goals to members and leaders?

*Goals should be defined objectively (SMART goals), with the desired outcome in mind (the result you hope to achieve).

Step 5: Reconcile your organization's resources against its goals.

- Realistically evaluate the capacity of your organization and the resources you have available to pursue your goals
- What gaps exist/need to be filled to achieve your goals?
- How can you obtain the resources you need? (people, processes, technology, funding, support, etc.)

Step 6: Define tactics to move the organization towards its goals. (short-term actions, assigned ownership, due dates, accountability)

Step 7: Define Key Performance Indicators to measure progress.

- KPI's should focus on tracking
  - Objective evidence of progress
  - A means of comparison to trend change in performance over time

*efficiency, quality, compliance, timeliness, profitability, utilization, etc.