

Key Steps to Conduct Strategic Planning

1. Getting Started: Clarify the Process, Timeline, Purpose and Contents of Plan

- a. What is the purpose of this new plan?
 - If your program is going to develop new focus areas and activities, then a strategic planning process could help you select those focus areas, create goals and envision a set of accomplishments.
 - If you are looking to lay out the key steps over the next few years for your existing program goals then a multi-year action plan, rather than a strategic plan, may be better (and several steps listed on this handout may not apply).
- b. Determine the plan's audience
 - For internal use? For internal and external use?
- c. Determine the plan's timeframe: three years? Five years?
- d. Decide the plan's level of detail:
 - Goals and objectives only?
 - Strategies, too (i.e. how to achieve the objectives)?
 - Yearly action plans to lay out key steps to implement strategies and reach objectives?
 - What else will be included?
- e. Will you amend your existing vision and mission statements or stick with what you have currently?
 - Vision statement: the dream – what you hope your work accomplishes “big picture”
 - Mission statement: the work your program/organization does towards your vision
- f. Create a timeline for the planning process

2. Identify the stakeholders who will contribute to the plan or participate in the planning process:

- a. Set up a planning team of internal (and possibly external) stakeholders to design and guide the planning process
- b. Clarify who will make the final decisions about the goals and objectives that are ultimately put into the strategic plan.
- c. Decide who else will participate in the planning process and what their role will be

Potential Internal Stakeholders:

- Senior managers
- All staff
- Other Internal stakeholders

Potential External stakeholders:

- Community organizations, academics, schools, city staff, etc.
- Facilitator – who will play this role?

3. Create, Modify or Re-Affirm Your Vision and Mission Statements

- a. Develop, amend or confirm vision and mission statements
- b. Obtain consensus on vision and mission statements – either to keep as is or to modify.

4. Gather Information

- a. Decide what information you need to gather? Types of information include:
 - Data about the public health and equity issues pertaining to your program
 - A SWOT analysis of your program/organization (Strengths, Weaknesses, Opportunities, & Threats)
 - Successful strategies and best practices used in other counties, states, etc.
 - Gap analysis, i.e. what is currently being done to address this issue and what is not being done?
 - A gap analysis can also look at “systems” and what improvements are needed. For example, when hospitals prepare to discharge homeless patients, are they collaborating with community-based agencies to make sure patients receive the support they need once they leave? Are different community-based agencies coordinating with one another to offer comprehensive support to homeless people?
 - Information that relates directly to the plan’s focus areas. For example, how to improve your program’s use of technology or how to better partner with community organizations on complicated public health problems.
- b. Choose the mechanisms for gathering the information you need:
 - Focus groups with stakeholders?
 - One-on-one interviews with key stakeholders?
 - Staff meetings?
 - A survey of all staff?

- c. Gather the information

4. Identify and Prioritize Goals

- a. Evaluate the findings. Discuss the different ideas that have emerged through the analysis of information gathered and convert them to possible goals.
- b. Determine the major issues your organization wants to work on in the next three to five years (or duration of plan).

- c. Align this plan with other plans that guide your organization's work.

5. Develop Objectives, Strategies and Action Plans

- a. Draft SMART objectives (Specific, Measurable, Action-oriented, Realistic, Time-bound)
- b. Develop time-bound strategies that you will implement to reach each objective
- c. Develop yearly action plans if you wish to include more detail for how you will implement the strategies
- d. Develop performance measures or milestones to ensure you make (annual) progress towards reaching your objectives (if your strategies do not suffice).

6. Distribute the Plan

- a. Make the plan available electronically and in print (if helpful)
- b. Share the plan with stakeholders who contributed to its development

7. Implement, Monitor Progress and Update the Plan

- a. Develop yearly action plans to implement the plan's strategies
- b. Develop a process and timeline for conducting regular reviews of progress made and making changes/updates to the plan