



## INTRODUCTION

Strategic planning is a systematic process through which an organization agrees on – and builds commitment among key stakeholders to – priorities that are essential to its mission and are responsive to the environment. Strategic planning guides the acquisition and allocation of resources to achieve these priorities.

*See Addendum for tips on using this toolkit remotely.*

## STEP 1: PROCESS PLANNING

**Design a strategic planning process to meet your organizational needs.**

### Key Outcome Questions:

- What would success look like at the completion of the planning process?
- What does your organization wish to achieve from a planning process?
- What issues or choices do you think need to be addressed during the planning process?

### Key Process Questions:

- Who will lead the strategic planning process? What is the work plan for guiding the strategic planning process?
- Will you use an existing committee, or do you need to form a strategic planning committee? If using a strategic planning committee, who should be on that committee?

### Key Organizational Questions:

- Has the organization ever done strategic planning? If so, what was the process and results? Was the plan implemented and if so, was it successful?
- What is the perspective of your senior leaders about strategic planning? Do they see it as important to the direction of the department?
- What conversations might you need to have with them about their role in the process, including participating in discussions, approving the plan or submitting it to the dean?
- Will they support you and your staff allocating time and resources to complete the process? Now or in the future?



- What might be their perspective on any organizational mandates such as legislation, federal funding, etc., that would influence the outcome?

### Key Actions:

- Review the organization's history and previous strategic plans.
- Review standing documents – mission, vision, values.
- Establish the membership of the strategic planning committee.
- Agree on planning process – this includes communications, decision making, how planning group will operate, group norms, meetings, how a project plan with milestones and timeframes is developed and followed, etc.

## STEP 2: CLARIFY (OR DEVELOP) MISSION, VISION. AND VALUES

**Articulate the mission, vision, and values for your organization.**

### Key Mission Questions:

- What is/are the focus problem(s) that our organization exists to solve?
- What need or opportunity does our organization exist to resolve?
- Who is affected by the problem? How are they affected?
- If we were successful, what impact would we have regarding this problem?
- What are the assumptions on which our organization does its work?
- What is the purpose of our organization?
- What are the methods that our organization uses to accomplish its purpose?
- What are our primary services or programs?

### Key Vision Questions:

- What does your organization aspire to be in the next 3 to 5 years?
- What are you striving toward in the next 3 to 5 years?
- What will success look like in the next 3 to 5 years?



### Key Values Questions:

- What are some of the values, beliefs, and/or guiding principles that do (or should) guide your staff's interactions with each other and with constituencies?
- What are the behaviors we should commit to doing in everyday practice in support of our values, beliefs, and guiding principles?
- Which of these values are core and which are aspirational?
- What will you do/are you doing to reinforce your values?

### Key Actions:

- Develop (or clarify) mission statement: A statement of purpose that captures why your organization exists.
- Develop (or clarify) a vision statement: An image of the future you seek to create; what your organization aspires to.
- Develop (or clarify) a values statement: Guiding concepts, beliefs, and principles that articulate what your organization believes in and holds true to help guide your behavior.

### Possible Exercises:

- Google mission/vision/values statements or representational images and bring in favorites.
- Imagine a Gazette article 5 years in the future: what would be the headline, quote, sidebar, photo and caption?
- Create an anonymous survey for the committee and discuss results/look for themes.

## STEP 3: ASSESS THE ENVIRONMENT

**Capture the current state of the organization and its work and begin to envision the organization's future.**

### Key Questions:

- What are our organization's primary strengths and weaknesses—internal forces working for and against our organization achieving its mission?
- What are our organization's key opportunities and threats—political, economic, social, technological, demographic, or legal trends that are or may impact our organization's ability to achieve its mission?



- Are there any possible connections between an opportunity or threat and a strength or weakness?
- Are there any opportunities we can take advantage of because of a particular strength?
- Are there any threats that are compounded by a weakness?

#### Key Actions:

- Capture the current state of the organization and its work.
- Clarify the world in which the organization operates.
- Analyze external opportunities and threats and internal strengths and weaknesses.
- Engage with stakeholders around their impressions of and hopes for the organization.

#### Possible Exercises:

- SWOT analysis
- Stakeholder interviews or email responses
- Develop and distribute stakeholder survey

## STEP 4: IDENTIFY PRIORITY ISSUES

**Consider themes from environmental scan and clarify areas of future focus.**

#### Key Questions:

- What themes did we see in our environmental assessment?
- What are the most pressing issues facing this organization?
- What did we hear from our stakeholders/leaders?
- What clear business needs are emerging?
- What should the organization stop, start, or continue?

#### Key Actions:

- Identify and gain consensus on priority areas.
- Ensure alignment of organizational priorities with university priorities.
- Report back key findings to stakeholders/leaders.

#### Possible Exercises:

- Brainstorm themes and then narrow by forced choice analysis or group vote.



- Present environmental scan to leadership/stakeholders and look for areas of alignment with organizational goals and initiatives.
- Compare current state and desired future state and do gap analysis.
- Once a strategic plan is in place, the plan should be reviewed, assessed, and adjusted on an ongoing basis.
- Progress should be regularly evaluated and measured against the plan.

## USEFUL VIDEOS

- Intro to strategic planning: <http://www.youtube.com/watch?v=6c5kl5rJyBo>
- Common pitfalls: <http://www.youtube.com/watch?v=nKXXcrTTZU0>
- Vision statements: <http://www.youtube.com/watch?v=ioY-YSOKBtY>
- Value statements: <http://www.youtube.com/watch?v=NCDlozomQiY>

## USEFUL ONLINE COURSES

Harvard Manage Mentor – Strategic Thinking and Strategic Execution

[http://harvie.harvard.edu/system/files/Forms/Career\\_Professional\\_Development/ManageMentor.pdf](http://harvie.harvard.edu/system/files/Forms/Career_Professional_Development/ManageMentor.pdf)

## RECOMMENDED READING

*Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, Second Edition. By: Michael Allison and Jude Kaye



[Pick the date]

**Direction Statement: Mission, Vision, and Values**

*Priorities, Objectives, Strategies, Measures, Goals Table*

Priorities	Objectives	Strategies	Measures	Goals (Individual)





## ADDENDUM: USING THIS TOOLKIT REMOTELY

### During Step 1: Process Planning:

Include among the members of your planning committee, a project manager who can take primary responsibility for managing process documentation in an online platform such as Microsoft Teams. This person should be proficient in using the selected document management platform. Adopt clear protocols for maintaining shared documents through the thoughtful use of administration and editing rights, naming conventions, folder management and version control. Ensure that your project manager has full authority to oversee adherence to these protocols.

Consider in advance which elements of the planning process can be conducted asynchronously through individual assignments, and which are best conducted synchronously via video or phone conference. The quality of discussions and decision-making conducted by video conference may benefit from smaller numbers of participants and shorter, more frequent meetings, well informed by data gathered asynchronously and viewed in advance.

For video conference meetings, consider having your project manager, or another technically savvy assistant, serve as the moderator, attending to the chat function and managing any technical aspects of using the platform for a well-structured and productive session.

### During Step 2: Articulating Mission, Vision and Values:

Choose from the suggested key questions and exercises and assign pre-work to optimize the productivity of a video meeting aimed at adopting these foundational statements for your group. As with any meeting, better prepared participants will be more engaged participants. This is even more important when meeting remotely.

Explore how the various features of your video platform, or complementary tools, can enable creative approaches to building consensus as you synthesize and refine your committee members' ideas into compelling shared statements. Shared screens, breakout rooms, polling,



real-time white board, and even the simple group chat feature provide many options for conducting a lively online interaction that produces great results.

Assume that some post-work may be needed to finalize the statements developed during the meeting and assign one or two members to complete that work offline for later committee ratification.

### During Step 3: Assessing the Environment:

Leverage both asynchronous tools and synchronous interactions to generate a comprehensive picture of your operating environment that will help you identify your highest strategic priorities.

Before engaging in the S.W.O.T. exercise as a committee, compile and analyze as robust a collection of stakeholder perceptions as is appropriate to the scope of the planning effort. You can collect stakeholder feedback via a survey or by email, conduct focus groups by video, and use either phone or video for one-on-one interviews with your most important stakeholders.

With a summary analysis of stakeholder input in hand, the planning committee will be well prepared to engage in a S.W.O.T. exercise that reflects not just their own perceptions of the operating environment, but represents a broad range of stakeholder interests, as well.

Consider having planning committee members complete a S.W.O.T. analysis worksheet [link] in advance to reduce the amount of time required for populating the S.W.O.T. during the video call, which will leave more time for affinity mapping and discussion. An online brainstorming tool such as [MIRO or Stormboard] is an excellent choice for doing this work together online.

### During Step 4: Identifying Priority Issues; Finalizing your plan

Schedule a separate video session for this step to ensure fresh energy and focus. You can use the voting and forced ranking features of the same online brainstorming tools you used in step 3 to collaboratively translate the insights from your S.W.O.T. into the priorities, objectives and strategies that you will include in your strategic plan.





Take care to leave the documentation site in good order as a resource for future planning efforts. Upload your plan as a living document to an easily accessible shared location for frequent reference in the ongoing development of organizational and individual goals.



## TOOLS FOR DEVELOPING A STRATEGIC PLAN REMOTELY

### Collaboration platforms

- Zoom
- Microsoft Teams
- Sharepoint

### Survey software

- Qualtrics
- Microsoft Forms

### Online brainstorming tools

- MIRO
- Stormboard
- Klaxoon

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