



Strategic Planning Worksheet

A strategic plan defines what your organization needs to accomplish that will facilitate the best and most efficient progress within a specific time period towards your mission and, ultimately, your vision. If done correctly, your strategic plan will enable:

- **Direction:** agreement among Staff and Board members on goals, aims, and mission
- **Alignment:** knowledge, experience, and work support the strategy
- **Commitment:** willingness of Board and Staff to set aside their own personal interests and support the interests of the collective and the organization¹

Vision:

Mission:

1) *Mission Statement Breakdown*

To create the best strategic plan, we need to first be clear about exactly what the mission statement means. Below is a breakdown of your mission statement, along with questions that will help us define exactly what it means. These questions will help you define and focus your efforts and priorities, and the answers will become the foundation for your strategic plan. When you answer, be as specific as possible.

Mission piece	Defining questions	Answers

¹ Lusiani, M. and Langley, A. (In Press 2018). The social construction of strategic coherence: Practices of enabling leadership. *Long Range Planning*, <https://doi.org/10.1016/j.lrp.2018.05.006>



Human Systems

Build people potential. Improve organizational outcomes.

2) *Identify your target client.*

What individuals, groups, and/or organizations are you trying to *directly* serve?



3) *Stakeholder roles, organization needs, and stakeholder needs.*²

Identify not just your stakeholders, but also your stakeholder roles. One stakeholder can occupy more than one role; for example “parent” and “provider”. Next, identify what you need from each stakeholder to achieve your mission. For example, if you identify one of your stakeholders as “Provider”, what do you need from Providers to achieve the mission – feedback, training design/participation, information about needs? Finally, identify what each stakeholder needs from your organization. In the case of childcare centers, do they need trainings on certain subjects, assistance with preventing turnover and related staffing issues, or assistance with child behavior challenges?

Stakeholder role	Organization needs	Stakeholder needs

² Kenny, G. (2018). 6 steps to make your strategic plan really strategic. Harvard Business Review.



1) *Creation of Guiding Principles*

Making sure that Board and Staff operate according to defined and agreed-upon philosophies, principles, and values will ensure consistency, integrity, and sustainable effort across the organization and in interactions with clients and community members.³

Use the table below to write down words and descriptions that you think should be included. You may want to use the “Vision and Mission Exercise” document to help you. The first one is completed as an example.

Philosophies, principles, and values	Description

³ From Metz, A.(2016). Practice profiles: A process for capturing evidence and operationalizing innovations. National Implementation Research Network, Chapel Hill, NC.