



Elements of a Strategic Plan

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Define Vision, Mission, Activities and Values

The foundation of the strategic plan is the vision, mission, activities and values of the organization. When articulated in formal statements, they provide the framework for identifying strategic goals. The statements provide a vision or target goal for the organization to achieve and define what the organization does and why. They should be created or reviewed as the first step in formulating the organization's strategic plan.

A vision statement tells everyone the type of community or world the organization envisions for its constituency as a result of the work of the organization.

A mission statement describes what the organization will do, who it will do it for and how it will achieve the vision. The mission statement is often the only statement many people will read about an organization.

An activities statement describes the business or general activities you will use to achieve the organization's mission. A values statement describes the principles and beliefs that guide the operations of the organization. These statements provide a filter through which important decisions for the organization and the standards for evaluating the effectiveness of your programs and activities can be screened.

As the "owners" or representatives of the membership of the organization, the board of directors is responsible for creating or modifying the mission, vision, activities and values statements. Staff members can also be involved since they are responsible for day-to-day activities and may provide a valuable perspective on the work. Before you create or review your vision, mission, activities and values, take time to review the history of your organization. This will help refresh the memories of long-tenured board members and provide a better foundation for newer members. Schedule a retreat where board members and staff describe (chronologically) major events leading to the creation of the organization, individuals who played significant roles, victories and program accomplishments, funding sources and other supporters, and your organization's focus at various points in time. Reviewing the history will give board members a collective sense of what role the organization has filled in the past and can assist them in deciding what it can be in the future.

VISION

Even if your organization has a vision, mission and activities statement, it is helpful to go through several exercises that may either affirm the existing statements or provide a basis to modify them. To create the vision, board members should provide answers to the following questions:

As a result of the work of the organization, how will the community or the lives of the organization's constituents be changed?

What will the community look like? How will its members interact?

How will the organization be perceived in the community? What will be its image? When people describe the organization, what terms will they use?

Your vision will serve as the overall goal for which strategies will be developed to achieve.

Sample Vision Statement:

Create a community in which all residents are housed in safe and quality housing regardless of their household income.

MISSION

The mission describes the approach the organization will take to achieve the vision. To articulate your mission, board members should answer the following questions:

What will the organization do to accomplish the vision?

What types of services or products will the organization provide (housing counseling, housing construction and rehabilitation, educational services, economic development services, etc.)?

Who will be the primary beneficiaries of these activities?

ACTIVITIES

The activities of the organization, which describe what your organization will do to achieve its mission, should be summarized in one sentence. Board members should discuss specifically what business or activity their non-profit will use to reach its mission and why.

Sample Activities Statement:

Develop affordable housing and other services, such as child care and job training, and help residents access our services.

VALUES

Values are your core beliefs and principles. They define why you carry out your mission the way you do and help develop strategic objectives and work plans. To define your organization's values, board members should answer the following questions:

Why is it important for this organization to carry out its activities?

In all of the organization's activities, what should be the underlying principles that cannot be compromised?

Sample Values Statement:

Neighbourhood residents must be involved in key decisions affecting their lives.

In many organizations the vision, mission, activities and values statements are integrated into one comprehensive "mission statement." Other organizations use a combination of two statements. If you decide to have one statement, it is important that all the elements of mission, vision, activities and values are included. It is equally important that this statement be clearly written and kept

short and direct, since your mission statement is listed in most of your publications and proposals.
The Basic Steps of Strategic Planning

Prepare To Plan

Define and Review Organizational Vision, Mission, Activities and Values

Do an Environmental Scan or SWOT (strengths, weaknesses, opportunities and threats) Analysis.

Identify Strategic Issues

Develop Strategic Goals and Objectives

Create Implementation Plans To Achieve Goals and Carry Out Objectives

Monitor and Evaluate Periodically

Strategic planning should not be confused with other planning processes such as business planning, program planning or community planning, also referred to as neighborhood planning. Although closely related, strategic planning focuses on establishing your organizational direction, setting priorities and identifying obstacles and opportunities that may limit or enable you to carry out your mission.