

# Strategic Planning Workbook

**There's no set formula for strategic planning.**

However, a great strategy includes some foundational elements.

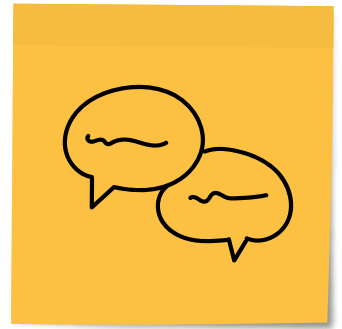
This workbook is designed to help you get started in thinking through some of these core elements. While it's best to have someone help you facilitate your strategic planning process, these worksheets can give you a head start and help you practice your 'strategic thinking' about your organization's work.

*This workbook contains exercises covering the above key elements of a strategic plan.*

*You can complete one or all of the exercises.*

# Exercise 1: Internal Reflection

Before you look forward, take some time to look back and reflect on what your organization has done, what you've achieved and where you've fallen short. Start out by answering the following questions:



*What do you think were your top 3 achievements in the last 2-3 years?*

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*What do you think enabled these successes?*

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*What do you think were your top 3 major challenges/failures?*

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*What do you think caused you to struggle?*

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# Exercise 2: Analyze Your Context

## Situational Analysis - SWOT

A SWOT is a useful framework to help your organization analyze internal strengths and weaknesses, and external risks and opportunities. Provide answers in bullet format in the boxes below. To get these answers you might consider the following: talking to members of your team or your board; reviewing reports or data from your organization or from others in your field or working in your area.



**Strengths - What is your organization great at? What do you do best?**

**Weaknesses - Where does your organization have challenges? Where do you need to get better in order to be successful?**

**Threats - What are potential external threats that could put your work at risk? What changes or trends are creating new risks to your work?**

**Opportunities - What external factors are creating the greatest opportunities for your organization to achieve more? What external changes or trends are creating important new opportunities?**

# Exercise 3: Problem Analysis

What is your organization working to change, what problem must it solve? Before you identify solutions - i.e. the work your organization will do to bring about change - you must first know what the problem is that you're working to solve.



NOTE: In the following sections you will work on your vision and mission. When you solve your problem, it will help you arrive at your vision. Then your mission will be the main action you take to solve your problem. Your goals will be the big results you need to achieve to address your problem and move towards your mission. Therefore, keep your problem top of mind as you move through the strategic planning process.

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**1) What is the problem your organization is trying to solve in the next 5 years?**

**Tip: It is okay if you come up with multiple problems as you brainstorm, but it is extremely helpful to identify the single biggest problem YOU exist to solve. There might be other smaller problems you will partner with others to address.**

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**2) How do you know it is the problem? Tip: What evidence do you have for this?**

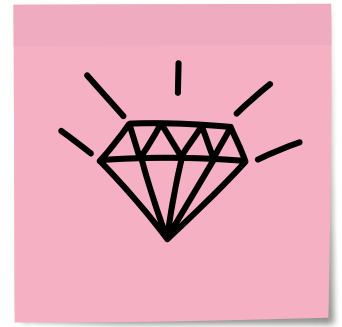
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**3) What are the drivers and causes of the problem? Tip: Ask yourself what is behind the problem? Why is the problem happening?**

# Exercise 4: Value Proposition

Your value proposition hones in on your organization's unique role and advantages. It describes what makes your organization special and stand out and where you can achieve the greatest impact.

To develop your value proposition, reflect on the two core questions and the diagram below. After reflecting you can craft a statement in a sentence or two, or even just a set of bullet points, that describes your organization's unique strengths and its niche.



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**Question 1:** *Where are the greatest needs or opportunities for your organization's work and purpose?*

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**Question 2:** *What are your organization's unique strengths and role relative to others?*

**\*Tip:** *When thinking about the above questions you might ask yourself: Why would others want to work with us? What would they think we bring that another organization might not?*



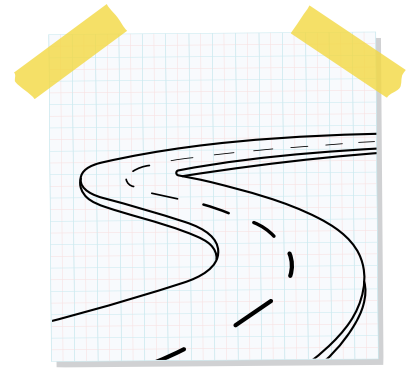
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**Value Proposition:**

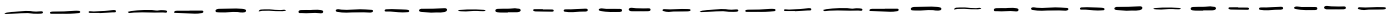
# Exercise 5: Vision

Your organizational vision describes the world you want to create through your work. It is the ideal future state your organization wishes to see take shape – your ultimate ‘dream’ of the future. A vision is achieved by many working together and will not result solely from the work of your organization alone.

To develop your vision, think about the world you want to work towards through your organization’s work. Think about what is different or will change as a result of your organization’s work.



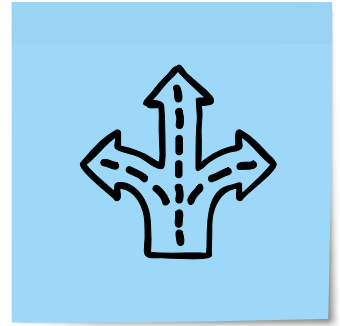
***In the space below draw your vision of your ultimate ‘dream’ of the future. Be creative and use whatever artistic tools you prefer (if writing is your most creative form of expression, then feel free to include some words too). Dream big and bright!***





# Exercise 6: Mission

Building from your vision, your mission describes what you do to create the changes that you want to see happen. The mission describes your core purpose and what outcomes you are working to create in order to bring about your vision of the future.



## Mission statements often include:

- Who/what you are targeting to help/impact
- What are you doing to/for your target group or beneficiaries
- The basic outcome you are working towards
- Geographic detail relevant to your organization's focus

Good mission statements are clear and brief and avoid confusing jargon or too many modifying statements. You don't want to explain too much about how you'll do something, rather what you will do. Here are some examples from conservation organizations:

*We rebuild tropical fisheries with coastal communities*

*To maintain a healthy connected landscape for people and wildlife in Kenya's South Rift.*

*To conserve and grow the Grevy's Zebra population in Northern Kenya*

*To promote sustainable coexistence between people and lions by using cultural values, community participation and science.*

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**Follow these instructions to develop a clear mission statement:**

**Try to limit yourself to 10 words or less.**

**Include a Verb; a key outcome; and a specific target population or setting.**

### Verb

(List out possible verbs here, e.g. 'conserve,' 'grow,' 'restore')

### Outcome

(List possible outcomes here, e.g. 'healthy,' 'educated,' 'better off,' 'stronger rights')

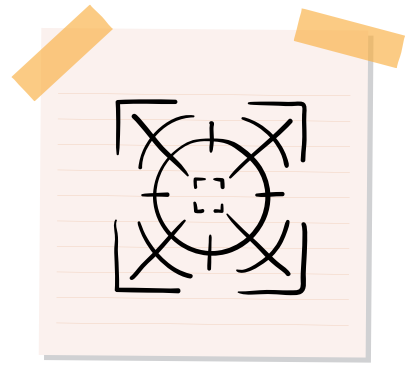
### Target population or place

(List the population or place, e.g. 'Malagasy fisher communities,' 'northern Zambia,' etc.)

# Exercise 7: Goals

Goals describe the key outcomes you are working towards, that will enable you to achieve key steps towards delivering on your mission. Goals describe what success looks like over a given time frame and focus your energies on tangible outcomes critical to your mission.

Setting good and clear goals is critical to making progress and setting priorities.



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**Imagine you are in the future, writing a report to capture your major achievements and results over the past several years.**

**What are the major achievements you would want to see highlighted in your report? (Remember - your key achievements are helping you tackle the problem you need to solve and advance you closer towards your mission.)**

**Use these achievements to now craft the first draft of your Goals.**

**Aim for 3-5 Goals.**

Example goals:

**Secure** and strengthen community rights to land through strong and effective local governance institutions.

**Increase** access and use of family planning.

**Raise** \$5 million in additional funding to allow for geographic expansion of our work.

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