

PREPARING TO WRITE YOUR STRATEGIC PLAN

SOCIAL SCIENCE TOOLS FOR COASTAL PROGRAMS



NOAA Coastal Services Center
LINKING PEOPLE, INFORMATION, AND TECHNOLOGY

Social Science Tools for Coastal Programs
Preparing to Write Your Strategic Plan

About This Publication

To develop a successful strategic plan, proper preparation is important if the process is to be efficient and the end product effective. This workbook provides a preplanning course of action for coastal resource management organizations, including approaches for the information collection phase and a process for sharing that information within the organization.

Preparing to Write Your Strategic Plan is part of the NOAA Coastal Services Center’s social science workbook series. To see this and other titles, visit www.csc.noaa.gov/publications/.

About the NOAA Coastal Services Center

The National Oceanic and Atmospheric Administration (NOAA) Coastal Services Center works with state and local programs devoted to the wise management of our nation’s coastal resources. The Center provides these programs with tools, training, and expertise that might otherwise be unavailable. To learn more about the products and services available from the Center, visit www.csc.noaa.gov.

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Figure 1 – Strategic Planning Pyramid

Introduction

Strategic planning is a multi-step process to systematically assess an organization’s direction and priorities. A good planning process requires adequate time and effort for gathering and analyzing data and trends, setting direction, deciding on strategies, activities, and resources, and evaluating progress. This document, *Preparing to Write Your Strategic Plan*, provides tools to gather the information needed for the initial, or foundational, components of a strategic plan. Understanding this information allows an organization to both recognize the needs of the target population it is trying to assist—and to assess its ability to meet those needs. The organization can then develop a vision, shared by all parts of the organization, of what can be accomplished in the future.

Figure 1, the strategic planning pyramid, details a typical strategic planning process, from initial information gathering to implementation and evaluation. This publication focuses on the pyramid’s foundation—the essential building blocks:

1. Assess the target population
2. Perform a self-assessment
3. Develop a niche
4. Develop program outcomes

It is very important that each part of the organization be represented in this information-gathering process. Not only does this level of involvement ensure the breadth of information needed to develop a strong strategic plan, but having all the parts of the organization contribute and work together helps everyone develop a sense of ownership in the results. Lack of ownership is the number one reason that a strategic plan fails to achieve the desired results.

Depending on the organizational structure, the parts of the organization involved in the strategic planning process may be called programs, divisions, teams, or some other organizational unit. For the purposes of this workbook, we will refer to the parts of the organization involved in strategic planning as *programs*.

This publication provides the framework that each program can use to gather the needed information and participate in the process leading to a shared vision.

Several aids are included. Appendix A provides a glossary for commonly used terms. Worksheets for compiling each program’s information are included in Appendix B. Appendix C provides the presentation template that programs may use to report their findings during the visioning meeting. Appendix D represents a case study from a hypothetical organization undertaking this process. Appendices E and F assist with next steps, presenting a process agenda template for the shared visioning meeting and an example strategic plan template for organizing the written plan.

Step 1 – Assess the Target Population



The first step in strategic planning is to identify the *target population* for a program's efforts. The target population is composed of the individuals or communities that the program is seeking to engage. Engaging this target population through activities, products, and services allows the program to affect the population's actions for their mutual benefit. The portion of the target population that becomes engaged with a program is frequently referred to as the *audience*.

Each program should gather information about the skills, knowledge, and abilities of its target population. This assessment should include the population's technological, informational, skill, and tool needs, and an inventory of the activities and products that each program is currently conducting or proposes to conduct to meet those needs. The program should also examine the target population's emerging issues and assess the program's ability to address those issues.

During the visioning meeting, participants will see the similarities among the different program audiences, the resources these audiences are receiving from the collective organization, and gaps between what is offered and what is needed.

OUTPUT – Complete worksheet 1 (Appendix B), “Assess the Target Population,” recording assessment data as they are gathered. Complete slides 1 to 5 in the presentation template (Appendix C).

Additional Information:

- A target population assessment for a hypothetical organization can be viewed in the case study provided in Appendix D.
- When working with a new target population, the following resources will be helpful.
 - Needs assessment training: www.csc.noaa.gov/needs/
 - Guidebooks on conducting focus groups and designing and delivering surveys: www.csc.noaa.gov/publications/

Step 2 – Perform a Self-Assessment



Now that the target population information is available, it's time to assess the program.

Assessing the program's available resources and skills as well as the environment in which the program operates is important, since these factors affect what a program can realistically accomplish.

One way to start this conversation is through a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis. The SWOT analysis contains questions that program members can answer about the program and the organization. This analysis will identify important pieces of information: each program's unique expertise and contribution to the needs of the target population; trends in the field; and the capabilities the program may need to master in the future.

OUTPUT – Complete worksheet 2 (Appendix B), “Strengths, Weaknesses, Opportunities, and Threats.” Complete slides 6 to 7 in the presentation template (Appendix C).

Additional Information:

- A SWOT analysis for a hypothetical organization can be viewed in the case study provided in Appendix D.
- For more information on performing a SWOT analysis, visit www.mindtools.com.

Step 3 – Develop a Niche



Each program in the organization should develop its niche by considering the target population needs now and in the future, and by evaluating the program’s ability to direct expertise, resources, and skills to meet those needs. The niche describes the intersection where the capabilities and activities of the program are uniquely suited to meet the needs of its target population. Describing the niche involves identifying how the program’s existing or proposed expertise, products, services, and tools meet the specified needs.

The organizational niche is the synthesis of the program niches, where certain needs of the target population can be met through the combined efforts of the programs within an organization. In some cases, other organizations or providers may be working with the same target population. These other providers may be addressing different needs or may be interested in partnering to combine expertise and skills that result in improved products and services.

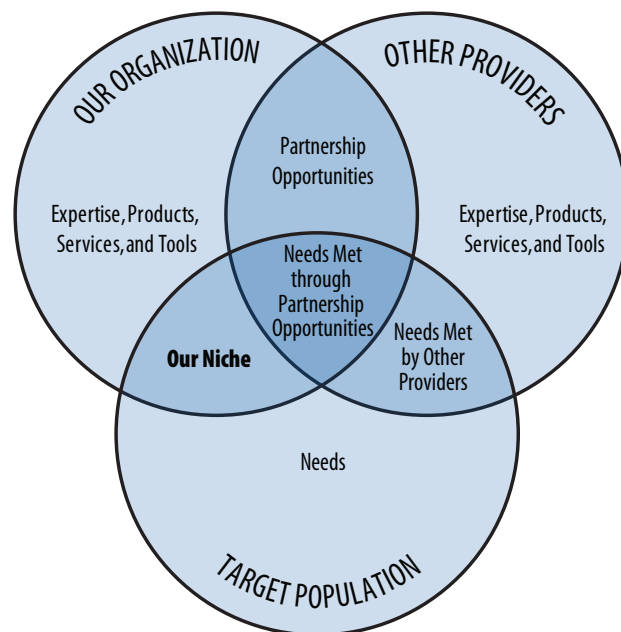


Figure 2 – Organizational Niche

The discussions to uncover the niche will help each program understand its contribution to the organization and the organization’s contribution in a broader context. This understanding will help to build a shared vision.

OUTPUT – Complete worksheet 3 (Appendix B), “Develop a Niche.” Complete slide 8 in the presentation template (Appendix C).

Additional Information:

- Niche development for a hypothetical organization can be viewed in the case study provided in Appendix D.

Step 4 – Develop Program Outcomes



Having an understanding of what each program is trying to accomplish individually will help the entire group of participants think at a higher level to develop an overarching vision.

With the niche described in terms of intersecting needs and capabilities, the program will communicate the impact that is expected in the future as a result of the program’s efforts. The outcome is the desired change in the audience’s behavior or the intended impact on the issue.

Outcomes may be short term (seeking immediate change) or longer. Frequently short-term outcomes are necessary steps to achieve a long-term outcome. Developing a logic model may help the programs define outcomes and connect resources and projects to the desired impacts. A logic model is a planning tool that many programs and organizations use to determine their primary outcomes and decide which activities and resources are needed to achieve these outcomes.

OUTPUT – Complete worksheet 4 (Appendix B), “Develop Program Outcomes.” Complete slide 9 in the presentation template (Appendix C).

Additional Information:

- Program outcomes for a hypothetical organization can be viewed in the case study provided in Appendix D.
- The NOAA Coastal Services Center offers a two-day logic model training course, Project Design and Evaluation: www.csc.noaa.gov/training/project-design.html
- Two online resources guide users through the logic model process.
 - Logic model training: www.uwex.edu/ces/lmcourse/#
 - Guidebook on logic model use: www.uiweb.uidaho.edu/extension/LogicModel.pdf

Next Steps – Building on the Foundation

Congratulations! The foundational information necessary to develop a sound strategic plan has now been developed. All programs in the organization have carried out the following tasks and are prepared to share their information with the other programs.

1. Assessed its target population
2. Performed a self-assessment
3. Developed a program niche
4. Developed program outcomes

It is now time to come together to create a vision for the future that is shared across the organization. A vision is a description of what an organization would like to achieve or accomplish. It is intended to guide current and future direction and so requires an understanding of the target population's needs, the organization's ability to meet those needs, and the outcomes required to move toward that vision.



Strategic Planning Pyramid

A shared vision is best developed at a meeting where all the participating programs can engage in a conversation to present and explain the information they collected and to talk through how the programs can work together across the organization. To start this conversation, each program will use the slides it developed to present its foundational information. Once this information is available to all, the group will have a better understanding of what the programs would like to accomplish and can then collectively define the impact that the organization would like to realize in the future.

An agenda template for a visioning meeting is in Appendix E. A neutral facilitator may be helpful during this process to help ensure participation and therefore ownership, and to keep the conversations focused on the topic.

To complete the steps toward implementing a strategic plan, the organization should use the foundational information and continue the steps depicted in the pyramid. The niche and outcomes developed by the programs in steps 3 and 4 will serve as starting points for developing strategic goals, the desired results or achievements toward which an effort is directed. Objectives for each goal will help to further refine the plan. The niche products and services identified in Step 3 will form the basis for how the goals and objectives can be accomplished.

To illustrate the additional information that will be needed and how it builds on the foundational information, a template for a full strategic plan is available in Appendix F.

Once the information is developed and the organization writes and vets the strategic plan, the outcomes and strategies developed through this process will inform how the plan is implemented. It is important to monitor the progress of the implementation and to evaluate the plan's effectiveness. A good strategic plan will be revisited and adapted as needed to accomplish the desired outcomes.

Additional Information:

- To evaluate the effectiveness of the strategic plan, the NOAA Coastal Services Center provides a helpful course that can be brought to your location, Planning for Meaningful Evaluation: www.csc.noaa.gov/training/meaningfulevaluation.html

References

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Appendix A: Glossary

Activities: Those efforts or interventions designed and conducted to produce an outcome.

Audience: The subset of the target population that has engaged with the program.

Goal: The result or achievement toward which effort is directed. A goal is broader and more general than an objective or an outcome. The program may contribute to this goal but does not necessarily direct it.

Impact: A program's sustained effect on the social, economic, or environmental condition (or any combination of the three).

Milestones: A notable point in development or implementation of a program that can be measured or tracked.

Mission: Description of an organization's core purpose, focus, and target population. A mission is the cause and the vision is the effect.

Objectives: Establish the standards of achievement in terms of a proportionate improvement in the existing condition. Objectives are SMART (specific, measurable, audience- or issue-directed, realistic and ambitious, and time-bound).

Outcomes: The changes expected as a result of the program or project.

- **Long-Term Outcomes** – The expected changes in a social, economic, or environmental condition as a result of the program or project.
- **Mid-Term Outcomes** – The plausible changes or human actions resulting from the achievement of the short-term outcome.
- **Short-Term Outcomes** – The expected immediate changes in the issue or audience resulting from the outputs.

Outputs: The tangible products and services resulting from activities.

Performance Measures: Objective, quantifiable indicators used to demonstrate the activities implemented, the outputs created, or the progress made toward outcomes.

Programs: The partitions developed within an organization that focus workloads.

Resources or Inputs: The funding, equipment, personnel, or other contributions needed to conduct activities and create outputs.

Strategies: The composite of activities and outputs designed to achieve outcomes.

Target Population: The individual, community, system, or other unit to which an activity or output is directed.

Vision: A description of what an organization would like to achieve or accomplish. It is intended to guide current and future direction. What the world would be like if the goal were achieved.

Appendix B: Worksheets

Worksheet 1 – Assess the Target Population

Work with the program team to complete the information below. This worksheet will inform slides 1 to 5 of the presentation template.

List the primary target population the products are developed to assist.

THE TARGET POPULATION IS:

List what the target population needs to accomplish its goals.

SKILLS:

TOOLS:

TECHNIQUES:

KNOWLEDGE:

Worksheet 1 – Assess the Target Population (*continued*)

List the products and services provided by the program that the audience currently uses.

What are some issues that may affect the target population's needs in the future?

FUTURE NEEDS AND EMERGING ISSUES:

What are some ways the program can assist the target population in meeting future needs?

NEW APPROACHES:

Congratulations, you have completed step 1.

Please enter these data into slides 1 to 5 on the presentation template.

Worksheet 2 – Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Work with the program team to fill in the boxes below. This worksheet will inform slides 6 to 7 of the presentation template.

Using this table and the information gathered in step 1, complete each box below from both external and internal perspectives. Discuss these descriptions with the program team to ensure a realistic perspective. (A blank table is on the next page.)

Strengths:

- What are your program's unique skills and resources?
- What does your target population view as your expertise?
- What trends do you have the expertise to capitalize on?

Weaknesses:

- What do you lack that your target population needs?
- What resources or skills is your program missing?

Opportunities:

- What does your target population need to face the future of coastal resource management?
- How are others addressing your target population's needs in facing the future?

Threats:

- To what threats does your weakness expose you?
- What expertise do you lack to address future trends?

Adapted from Mind Tools, Ltd., www.mindtools.com; accessed July 2009.

Worksheet 2 – Strengths, Weaknesses, Opportunities, and Threats (*continued*)

Strengths:

Weaknesses:

Opportunities:

Threats:

Congratulations, you have completed step 2.

Please enter these data into slides 6 to 7 on the presentation template.

Worksheet 3 – Develop a Niche

Using the information gathered in step 1 and step 2, work with the program team to answer the questions below. Using the answers, develop a niche statement for the program.

WHAT WILL THE TARGET POPULATION NEED IN THE FUTURE?

FROM THE LIST ABOVE, WHICH TARGET POPULATION NEEDS CAN BE FILLED BY OTHER ORGANIZATIONS?

BASED ON THE PROGRAM STRENGTHS, WHICH NEEDS LISTED ABOVE CAN THE PROGRAM BEST MEET?

THESE ARE THE UNIQUE PRODUCTS AND SERVICES THE PROGRAM OFFERS THAT THE TARGET POPULATION CANNOT GET ANYWHERE ELSE. THIS IS OUR NICHE:

Congratulations, you have completed step 3. Please enter these data into slide 8 on the presentation template.

Worksheet 4 – Develop Program Outcomes

Consider the target population needs and the niche from step 3 to develop outcome statements for the program. Answer the questions below to describe the impact the program anticipates.

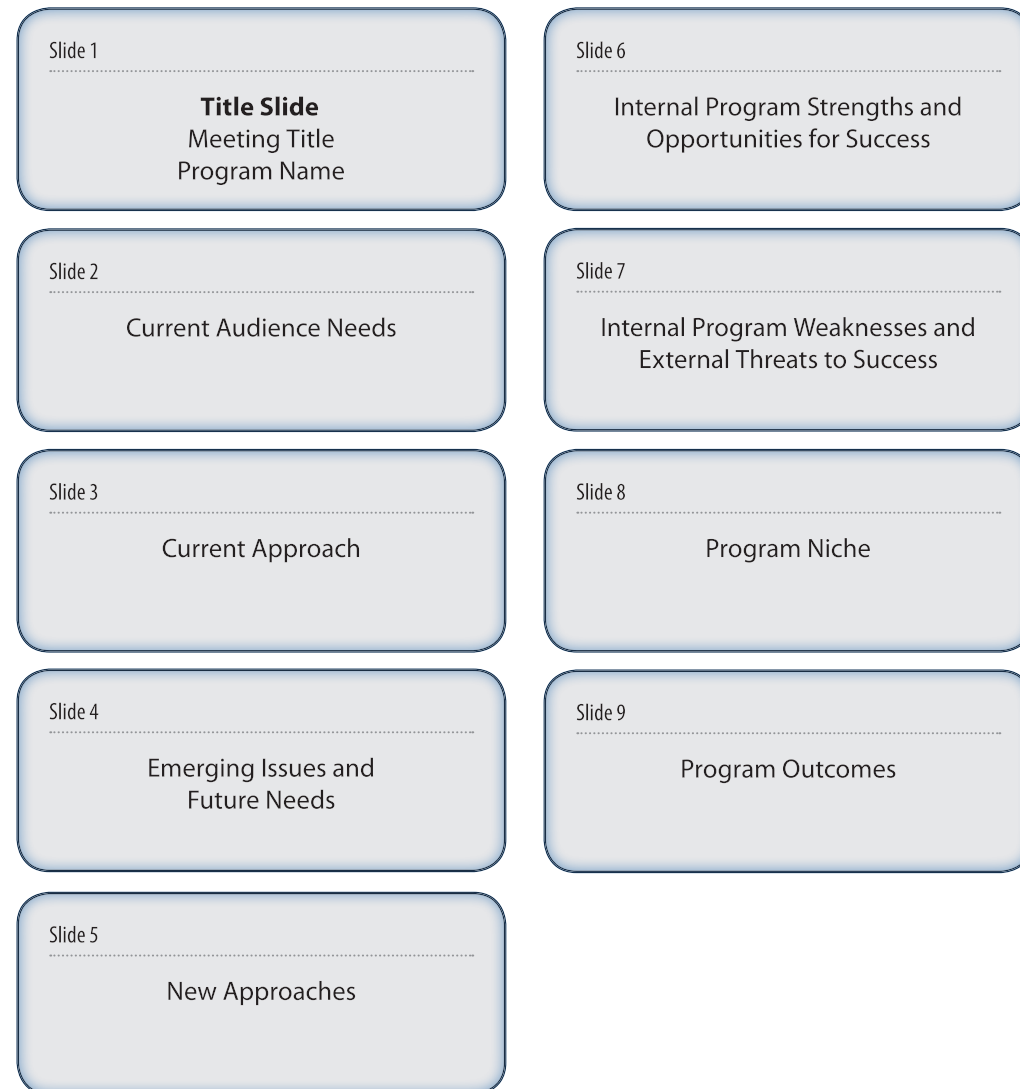
WHAT CHANGE TO THE TARGET POPULATION DOES THE PROGRAM HOPE TO EFFECT WITHIN 20 YEARS?

WHAT CHANGE TO THE ISSUE DOES THE PROGRAM HOPE TO EFFECT WITHIN 20 YEARS?

WRITE TWO OR THREE STATEMENTS THAT DESCRIBE THE CHANGE IN THE AUDIENCE AND THE ISSUE. WRITE THE STATEMENT AS IF THE CHANGE HAS ALREADY OCCURRED.

Congratulations, you have completed step 4. Please enter these data into slide 9 on the presentation template.

Appendix C: Shared Visioning Meeting – Presentation Template



Appendix D: Case Study

The fictional examples presented here illustrate how the pre-strategic planning process discussed in this publication works for place-based organizations, organizations responsible for protecting coastal resources and communities. In these examples, the organization is a preserve that receives support from a local university and partners with a nongovernmental organization, referred to as the conservancy, to conduct projects. The organization is composed of three programs: education and outreach, research, and stewardship.

1. Education and Outreach

The education and outreach program provides science-based learning opportunities to promote the understanding of the organization, its resources, and its relationships to the greater environment. The program works closely with schools in the area and conducts regular field trips for the students. Trainings and interpretation are developed and offered throughout the year on a variety of topics for visitors, K-12 educators, volunteers, and other community organizations.

2. Research

The research program promotes the use of the organization as a living laboratory for students, staff members, academic professionals, and visiting scientists. Research performed on-site aligns with long-term goals of protecting the resources through monitoring, investigative studies, and comparative studies over a wide range of subject areas.

3. Stewardship

The stewardship program works to provide long-term protection of the resources by coordinating volunteer activities and cooperating with community stakeholders to implement management plans. The stewardship or volunteer coordinator can coordinate and guide others in addressing a range of activities, from habitat restoration and biological monitoring to recreational-use management.

The following templates showcase the work accomplished by the education and outreach program as it followed the steps outlined in this publication.

CASE STUDY

Strengths, Weaknesses, Opportunities, and Threats Analysis

In step 1, the education and outreach program completed the target population assessment using the worksheets provided and transferred the information to the slide templates. This work will help the team perform a SWOT analysis, a process whereby the Strengths, Weaknesses, Opportunities, and Threats are studied.

Strategic Planning Meeting

Education Outreach Coordinator

Current Audience:

K-12 Educators, Volunteers, Visitors

Template Slide 1 of 9

Current Audience Needs

- To understand relationships between, and the impacts of, community decisions on resources
- To apply technical, research-based information to a community setting
- To have access to a science-based curriculum aligned with state standards
- To be given hands-on learning opportunities on-site for ages K-12
- To gain knowledge through interpretive signs on-site

Template Slide 2 of 9

Current Approach to Satisfying Needs

- Advise on science standards and implementation by working directly with the school board
- Assist teachers with a curriculum that meets standards and enhances the students' outdoor experience and learning
- Link teachers to information from Sea Grant and university resources
- Create displays and brochures for visitors' center
- Provide regularly scheduled interpretive tours of the site
- Provide training for volunteers as interpreters

Template Slide 3 of 9

Emerging Issues and Future Needs

- Science standards are changing and need new curriculum
- Volunteers need to know more about the reserve and how they can assist
- The surrounding community needs to be engaged to support the preserve and understand the issues that are facing it
- The program needs to provide regularly scheduled interpretive tours of the site
- The program needs to train volunteers as interpreters

Template Slide 4 of 9

New Approaches

- Provide a curriculum to teachers that helps meet state standards for science
- Train volunteers to support the stewardship function
- Train volunteers to support research functions
- Lead community outreach programs via volunteers

Template Slide 5 of 9

In step 2, the education and outreach program completed the SWOT analysis using the worksheets provided and transferred the information to the slide templates.

Education Program Internal Strengths

- Education of 5,000 students each year
- Good reputation with school board
- Advisor for state science standards
- On-site facilities with access to outdoor classroom
- Good science reputation
- Large network of contacts
- Good relationships with coastal stakeholders

Education Opportunities

- Communications about the preserve to community at large
- Friends of Preserve fundraiser or volunteer effort
- Partner with neighboring preserve to develop new curriculum

Template Slide 6 of 9

Education Weaknesses and Threats

- Decline in university funding
- Grant-to-grant staffing
- Lack of staff members to develop new programs
- Changes in city, county, school, and university contacts
- Neighboring preserve diverting funds from the university

Template Slide 7 of 9

In step 3, the education and outreach program defined its niche using the worksheet provided and developed this slide to describe the niche the program fills.

Defining an Education Niche

How our capabilities can meet anticipated needs:

- Work with schools and the school system to increase ecosystem literacy in the surrounding areas
- Increase our neighbors' awareness of resource needs and values through volunteer opportunities and activities
- Work with neighboring businesses to find solutions to contaminated runoff
- Train volunteers to assist with stewardship
- Train volunteers to conduct research and monitoring
- Provide curriculum to teachers that helps meet state standards for science

Template Slide 8 of 9

In step 4, members of the education and outreach program developed the outcomes they will work toward.

Education Outcomes

- Neighbors around the preserve visit it regularly and have a general understanding of the ecosystem and its value
- Neighbors value the resource
- Volunteers are well-trained and regularly assist the stewardship functions at the preserve
- Volunteers are well-trained and conduct research and monitoring

Template Slide 9 of 9

Appendix E: Shared Visioning Meeting – Agenda Template

Title of Visioning Meeting Date Location Meeting Start and End Times		
Elapsed Time	Topics and Objectives	Facilitators, Supplies, Materials, and Notes
0:00	<p>Introduction, workshop overview, and objectives: Know other participants; address meeting goals and objectives, expectations, and logistics.</p> <p>Activities:</p> <ul style="list-style-type: none"> Each participant introduces himself or herself and gives a brief description of expectations for the meeting. <p style="text-align: right;">Total Time: 15 minutes</p>	<p>Leader (highest-level person in room, preferably the one who has directed the development of the plan)</p> <p>Facilitator records expectations on a chart</p> <p>Markers, tape, flipcharts</p>
0:15	<p>Icebreaker</p> <p>Objective: Participants will interact, talk, and relax so that they know each other a little better.</p> <p>Activities: Icebreaker</p> <p style="text-align: right;">Total Time: 15 minutes</p>	<p>Leader can lead an icebreaker of his or her choosing. Icebreakers can be found here: www.wilderness.com/games/icebreakers.html</p>
0:30	<p>Program presentations</p> <p>Objective: Understand how each program contributes to the organization.</p> <p>Activities:</p> <ol style="list-style-type: none"> Each program presents the prepared program presentation (10 minutes per program). Participants ask questions about the information in the presentation (10 minutes). After all the program presentations, the facilitator guides a large-group discussion about program commonalities (30 minutes). <p>Recommend no more than six presentations</p> <p>Break (included in time above, usually after the fourth program presentation)</p> <p style="text-align: right;">Total Maximum Time: 2 hours, 45 minutes (20 minutes per program + 30 minutes for discussion + plus one break)</p>	<p>Program managers</p> <p>Facilitator leads questions and answers for each program</p> <p>Facilitator leads large-group discussion</p>

3:15	<p>What is the impact the organization will help bring about?</p> <p>Objective: Considering presentations from each program, participants will identify the strengths and weaknesses of the entire organization, and discuss and agree upon a shared vision and identity.</p> <p>Activities:</p> <ol style="list-style-type: none"> The facilitator should use the visioning exercise most applicable for the audience. Two examples are listed. <ul style="list-style-type: none"> Option A: Facilitator explains the scenario: The year is 2027. The headlines in the newspapers praise your program for the impact you have had. What does the headline say? (10) Option B: Facilitator explains the scenario: The year is 2027. Your organization has won an award for its effect on the community. What was the award for? (10) Ask each participant to write down the answer to the vision question on Post-it or index cards. (10) In groups of three to five, discuss the cards written in last exercise. Each group will determine which card best describes the vision of the organization. Groups tweak ideas as necessary and develop one large card. (20) <p style="text-align: right;">Total Time: 40 minutes</p>	<p>Facilitator</p> <p>Index cards for each participant</p> <p>Tape</p>
3:55	<p>Lunch</p>	
4:45	<p>What is the impact the organization will help bring about? (continued)</p> <ol style="list-style-type: none"> Groups report out as everyone discusses commonalities, differences, and categories. (15) Facilitate a discussion with the large group to develop the vision from the statements on the cards. Select one statement that incorporates visions from all programs; this statement should be one the group is somewhat satisfied with. Type this vision onto a projected slide. Ask the group what else it needs. Type changes as group members speak. Typing the vision and modifying it as you proceed allows the group to see the vision as it is being formed. Pausing occasionally to allow the group to read and process the current statement will assist with consensus. (30) <p>Break – Breaking here allows group members to individually process the discussion. (15)</p> <ol style="list-style-type: none"> Continue the discussion and vision fine-tuning after break. If the members of the organization are struggling with divergent visions, facilitate a conversation to discover the issues and reconcile them. (45) Gain buy-in (as a last resort, prioritize with dots on the cards and the typed version). (15) Review the final vision with the participants to ensure there is buy-in. (10) Congratulate group on its collective vision. (5) Using the information from the conversations, write a two- or three-sentence statement that concisely states what your organization is and does, for whom, and how. This is your mission statement. (30) Develop next steps, deciding who will write the strategic goals and strategies. (30) <p style="text-align: right;">Total Time: 3 hours, 15 minutes</p>	<p>Facilitator leads discussion</p> <p>Overhead projector</p> <p>Computer</p>
8:00	<p>Wrap-up day: congratulations, and follow-up</p>	

Appendix F: Strategic Plan Template

Vision, Mission, Goals

Vision

The vision is a description of what the organization would like to achieve or accomplish. The vision is intended to guide current and future direction. Some like to frame this as “what the world would be like if the goal were achieved.”

Mission

The mission statement consists of one or two sentences that describe the core purpose, focus, and target population of the organization. A mission is the cause and the vision is the effect.

Goals

The goals can be based on the program niches developed during the preplanning process. Goals are the changes or human actions that will result from the program or project. There can be as many strategic goals as the organization can realistically accomplish during the time frame established in the strategic plan.

Strategic Goal 1

The strategic goals can be based on the program niches developed during the preplanning process. The strategic goals are the changes or human actions that will result from the program or project. There can be as many strategic goals as the organization can accomplish during the time frame established in the strategic plan.

Objective

The objectives establish the standards of achievement in terms of some proportionate improvement in the existing condition. Objectives are SMART (specific, measurable, audience- or issue-directed, realistic and ambitious, and time-bound). A strategic plan may list several objectives per goal.

Strategies to accomplish this objective

Strategies are the composite of activities and outputs designed to achieve outcomes. Strategic plans may have several strategies per objective.

Strategic Goal 2

For this goal and those that follow, repeat the process identified for strategic goal 1.



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