

Strategic Planning Principles

THE FOUR-STEP PROCESS

- 1) **Research:** Define the problem – what's happening now?
- 2) **Planning/Programming:** Encompasses audiences, goals, objectives, strategies and tactics – What should we do, and why?
- 3) **Execution:** Taking action and communicating – How do we do it, and what do we say?
- 4) **Evaluation:** How did we do? (Often mirrors those instruments utilized in the research phase)

PLANNING STRUCTURE

- Mission or Purpose:** The overarching reason an organization or program exists. A visionary statement to guide the organization's planning for years to come.
- Goal:** A more specific expression of a mission/purpose, often related to one aspect. It may be described as the desired outcome of a plan of action.
- Objective:** Specific "milestones" that measure progress toward achievement of a goal by defining the who, what, when, and by how much. As such, they must:
- 1) Address the desired result and/or behavioral outcome
 - 2) Designate the public(s) among whom the behavioral outcome is to occur
 - 3) Specify the expected level of accomplishment
 - 4) Identify the time frame in which they do
- Strategy:** A general, well-thought out tactical action plan (a "package"). They do not indicate specific actions to achieve objectives. It is the plan of action chosen as having the most promising means of achieving a goal.
- Tactics:** Specific activities conducted to implement strategies of the program. These typically involve personnel, time, and costs. Tactics achieve objectives and, in turn, support the goals set to carry out the mission or purpose.

PLANNING CHECKLIST

- Discover critical facts
- Ensure findings are dependable by using a valid methodology
- Interpret data accurately and adequately
- Identify the problems in a statement form
- Subdivide the problem(s)
- State specific measurable objectives
- Segment and select target audiences in order of priority
- List all possible tactics for achieving objective(s)
- Enumerate resources available (and limitations) of money, time, management policies, personnel
- Develop a system to maintain management support