

# Action Planning

## Step By Step

### 1. Define your reason for being.

*Who are you and why are you here?*

You need three things here: a mission statement, a vision statement, and your organizational values. You probably already have a **mission statement**, a short and to-the-point declaration of your corporate purpose. Your **vision statement** captures your organizational spirit and doesn't need to be as succinct as a mission statement should be. Your **organizational values** set some boundaries on what you will and will not do and set a standard against which all else must compare -- so, even if an action seems like a good idea for economic reasons or the politically expedient thing to do, there are some moves you may not make, some opportunities you will choose not to take.

### 2. Assess your strengths and weaknesses.

*The S and W of a SWOTs analysis.*

This is an *internal* assessment of what you have -- and do not have -- going for you. You must be forthcoming here, and participants' opinions may vary a lot on this, so be prepared to discuss why you see it your way. **Strengths** are the things you do well, the things you have going for you as an organization (could be a dedicated and involved membership, a generous donor base, great programs and instructors, etc.) **Weaknesses** are things you don't do so well. Be honest.

### 3. Evaluate your environment: assess your opportunities and threats.

*This is the O and T of your SWOTs analysis.*

This is an *external* audit of what you cannot control in your environment. **Opportunities** are things you might be able to capitalize on, with a little effort (public outcry on recent event, foundations/corporate interests, new legislation, etc.). **Threats** are things that could bring you down and stop you in your tracks, such as a single funding source that is shaky, pending legislation, or a strong competitor in the community. Think broadly and outside the box.

### 4. Make assumptions about unpredictable future events.

*What could happen that would have a major impact on you (good or bad) and how would you respond?*

This is tough because by its very nature it asks you to anticipate the unanticipatable. Try to think about what could stop you short...and what you can do to make yourself less vulnerable. You will want to build those thoughts into your strategic plan. You will feel less vulnerable if you have contemplated the unthinkable.

### 5. Identify specific, measurable objectives.\*

*You know who you are and why you are here, but what do you want to do?*

The trick here is to balance specificity with caution: you want to be clear and targeted (so you have a hope of success), but not so limited that you haven't stretched yourself. **Objectives** should be challenging but realistic, for example: grow membership by 20%, expand program implementation by 20%, increase your funding base by 20%, pass parity. Make your objectives things you can know you have accomplished when you're done. Set a

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\* I use "objectives" but "goals" play the same role in this process. Use whichever term you feel suits your needs best.

time frame for your strategic plan: a year? 18 months? Not too long or you'll forget your plan and the world will change too much, not too short or you'll never get off the ground.

**6. Develop strategies that use available resources to achieve your objectives.**

*How will you get where you want to go?*

What are your financial resources? Staffing resources? Volunteer resources? How can they best be deployed to achieve your objectives? **Strategies** don't have to be long or elaborate. Be as clear and straightforward as possible.

**7. Develop tactics in support of your strategies.**

*What you will do, specifically, to get where you want to go -- and when you will do it.*

**Tactics** are the very specific actions you will take to get this job done. List them out, make staffing assignments, set a time line *and* deadlines. Break down the objective into step-by-step implementation. This is your chance to see how realistic your plans are, and make adjustments accordingly -- you may find that your plan isn't nearly ambitious enough, or that there's no way you can do what you have planned without a major re-thinking or reallocation of resources.

**8. Evaluate.**

*Are we there yet?*

A plan, like a map, is only as good as your ability to follow it and know if it has gotten you where you wanted to go. Setting measurable objectives helps make this assessment easy -- but you do have to go through the **measurement** and **evaluation** process. Score yourself on your quantifiable deliverables: did you increase membership by 20%? Seek feedback from stakeholders. Assess your impact: did you get parity passed? What might have been done differently and why?

**9. Reevaluate.**

*Before we go further, are we still on the right course?*

Strategic/action plans are ever-green, but time-limited. You will have set a time frame for your plan, and the end will eventually come. Before you rush into your next plan, think about whether the elements still make sense. Have your SWOTs changed? If you've achieved your objectives, what is next? What did you learn the first time around about your tactics and their success? Learn from your mistakes or be doomed to be repeat them.

Think big.