

◆ **Worksheet 1**

Creating a Mission Statement

- Draft Your Mission Statement
(Note: Please write legibly. Use only the space provided.)

What is the *focus problem(s)* that our organization exists to solve? What need or opportunity does our organization exist to resolve? (In considering the focus problem or need, you might want to consider the following questions: Who is affected by the problem? How are they affected?) Describe how the world would be improved, changed, or different if our organization was successful in solving the problem or responding to the need.

What is the *purpose* of our organization (answers the question of why we exist, does not describe what we do)? This should be a short succinct statement that describes the ultimate result we are hoping to achieve; make sure to indicate outcomes and results (e.g., to eliminate homelessness), not the methods of achieving those results which is your mission (e.g., by constructing houses).

What is our business? Describe the business or businesses we are in—our primary services or activities.

Worksheet 1 (*Continued*)

What are the *fundamental values and beliefs* that should guide us in our day-to-day interactions with each other and our constituencies? What are the *major assumptions* upon which our organization provides its services?

We believe:

-
-
-
-

We assume:

-
-
-
-

Our Mission Statement

(Combine the information above to create a compelling mission statement about *who* the organization is, what the organization does, and why the organization does it.)

◆ **Worksheet 2**

**Organizational History
and Profile**

- Summarize your organization's history and identify lessons from your history.
- Describe your programs and related infrastructure.

Presentation of Organization's History

Timeline	19__	19__	19__	19__	19__	19__	19__	19__	19__	19__	19__	19__
List Key Organizational Events and Shifts in Priorities (use the timeline to place in chronological order)												
List External Events Impacting the Organization (use the timeline to place in chronological order)												

Lessons from History: Keys to Stability and Growth	Lessons from History: Recurring Themes that Show Causes for Instability
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Worksheet 2 (Continued)

Organizational Profile

List all programs, projects, and services (and note their current scope and scale of service)	Group the activities into categories (sort by common outcome, write program goal for each grouping)	Note any related operations data (infrastructure data such as number of staff, number of Board, breakdown of revenue and expenses, etc.)

◆ **Worksheet 3**

Perceptions of SWOT

- List our chapter strengths and weaknesses (star [*] the top three internal forces).
- List the external opportunities and threats (political, economic, social, technological, demographic, and legal trends) that may impact the organization (star [*] the top three external forces).

Internal Forces	External Forces
<p data-bbox="490 360 606 387">Strengths</p> <ul style="list-style-type: none">•••••	<p data-bbox="1290 360 1450 387">Opportunities</p> <ul style="list-style-type: none">•••••
<p data-bbox="479 669 618 696">Weaknesses</p> <ul style="list-style-type: none">•••••	<p data-bbox="1325 669 1414 696">Threats</p> <ul style="list-style-type: none">•••••

◆ Worksheet 4

Members Perceptions and Expectations

Summarize findings regarding Members' perception and expectations of the organization.

<p>Members</p>	<ul style="list-style-type: none"> • What do our members need or expect from our organization? (What is the criteria they use to judge our performance?) • How well does our organization perform against those criteria (excellent, good, fair, or poor)? Why such a rating? • What do our members want us to do more of or less of? • What additional or increased programs or services do they think we should be offering if resources were available? 	<ul style="list-style-type: none"> • What do our members say about our organization's strengths and weaknesses? • What trends do they perceive as either opportunities or threats?

◆ Worksheet 5
Interplay of SWOT

□ SWOT grid: Using Worksheet 2, look at the interrelationship of your organization’s external opportunities and threats and its internal strengths and weaknesses and assess possible short-term and long-term organizational responses.

Major Opportunities

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-
-
-
-

Major Threats

-
-
-
-
-

Primary Strengths

-
-
-
-
-

Primary Weaknesses

-
-
-
-
-

	Invest: Clear matches of strengths and opportunities lead to comparative advantage.	Defend: Areas of threat matched by areas of strength indicate a need to mobilize resources either alone or with others.
	Decide: Areas of opportunity matched by areas of weakness require a judgment call: invest or divest; collaborate.	Damage Control: Areas of threat matched by areas of weakness indicate need for damage control.

(Source: Adapted from Kevin P. Kearns: “From Comparative Advantage to Damage Control: Clarifying Strategic Issues Using SWOT Analysis,” *Nonprofit Management and Leadership*, Vol. 3, No. 1, Fall 1992.

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◆ Worksheet 6

Core Future Strategies

Identify and assess your core future strategies.

Strategic issue (stated as a question)	Proposed strategy	Assumptions, facts, and values which support this proposed strategy?	What possible obstacles do we face in implementing this strategy?	What triggers might encourage us to re- evaluate this strategy?

◆ Worksheet 7

**Long-Term and
Short-Term Priorities**

What are your long-term and short-term strategic priorities?

Suggested Overall Program Priorities

Short-Term Program Priorities	Long-Term Program Priorities

Worksheet 6 (Continued)

Suggested Overall Management/Operations Priorities

Short-Term Management/Operations Priorities	Long-Term Management/Operations Priorities

◆ Worksheet 8

**Selection Grid for
Prioritizing Programs**

- Review the list of criteria to use in choosing program priorities, add additional priorities specific for your organization.
- List all programs (services) you wish to assess in relation to the listed criteria. Place a check (√) beside all criteria that apply to the program.

Criteria to Use in Choosing Program Priorities	Program: _____	Program: _____	Program: _____	Program: _____	Program: _____
Congruence with mission					
Measurable results					
Needed to support core strategies					
Fills a membership need not provided by another entity					
Provides an educational value for members					
Demonstrated need (documented current demands or predicted future demands for service; increased membership growth potential)					
Increases organization's visibility					
Funding is available to cover costs (through fees or third party funding)					
Shares resources (complements) existing programs					
Support collaborative efforts with other organizations					
Benefits outweigh or at the very least equal costs					
Produces surplus revenue to support other programs (after paying its share of indirect costs)					
Provides a community service					
Other					
Other					

◆ Worksheet 9

**Setting Goals
and Objectives**

Write your program and management/operations goals and objectives.

Program Goals	Program Objectives

Worksheet 18 (Continued)

Management/Operations Goals	Management/Operations Objectives
Staffing and benefits	
Resource development	

Worksheet 18 (Continued)

Management/Operations Goals	Management/Operations Objectives
Board of directors	
Planning and evaluation	
Public relations/marketing	

Management/Operations Goals	Management/Operations Objectives
Infrastructure	
Networking and collaboration	

◆ Worksheet 10

Evaluation of Plans and the Strategic Planning Process

- Evaluate your strategic plan, your annual operating plans, and the strategic planning process.
- Make any suggestions for improving future planning endeavors.

The Strategic Plan:	Yes	No
• Provides guidance to both short-term and long-term priorities?		
• Helps the organization to allocate resources?		
• Is understandable by people who have not participated in the development of the plan?		
• Responds to the organization's best understanding of its internal and external environments?		
• Develops from a consensus and commitment-building process?		
• Has been formally adopted by the board of directors?		
Comments and suggestions for future strategic plans:		

The Annual Operational Plan(s):	Yes	No
• Has both process and outcome objectives specified?		
• Has been developed by staff who are responsible for the implementation of the goals and objectives?		
• Provides an easy implementation, monitoring, and reference tool?		
• Operationalizes the strategic plan?		
• Is realistic?		
Comments and suggestions for future annual operational plans:		

The Planning Process Met the Following Criteria:	Yes	No
• The process itself was consensus building: It offered a way to surface the needs and interests of all stakeholders and allowed sufficient time to reach agreement on what is best for the long-term and short-term interests of the association;		
• The process allowed sufficient time to assess programs, and the strengths, weaknesses, opportunities, and threats; and		
• The process provided participants with tools to successfully complete the process .		
Comments and suggestions for future planning processes:		

◆ Worksheet 11

**Monitoring the
Strategic Plan**

- Review your strategic plan, noting accomplishments and disappointments.
- Assess any changes in the environment since the last strategic planning meeting.
- If necessary, make changes in core strategies and long-term and short-term priorities.

Date: _____

Overall accomplishments and status of implementation of Core Strategies:

Overall accomplishments and status of implementation of long-term and short-term Objectives/Priorities:

Reasons for non-accomplishments:

Worksheet 11 (Continued)

Change in the Environment Since Last Meeting:

<p>Previous strengths</p> <ul style="list-style-type: none">•••••••	<p>Current strengths</p> <ul style="list-style-type: none">•••••••
<p>Previous weaknesses</p> <ul style="list-style-type: none">•••••••	<p>Current weaknesses</p> <ul style="list-style-type: none">•••••••
<p>Previous opportunities</p> <ul style="list-style-type: none">•••••••	<p>Current opportunities</p> <ul style="list-style-type: none">•••••••
<p>Previous threats</p> <ul style="list-style-type: none">•••••••	<p>Current threats</p> <ul style="list-style-type: none">•••••••

Worksheet 11 (*Continued*)

Recommended Changes in Core Strategies:

Recommended Changes in:

Long-Term Priorities (Program and Management/Operations Goals and Objectives)	Short-Term Priorities (Program and Management/Operations Goals and Objectives)