
STRATEGIC PLANNING MANUAL

Lakeland, Winter Haven/Polk County
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PURPOSE

The purpose of this manual is to provide an overview of the strategic planning process. Additionally, it presents the five steps of the strategic planning process in detail providing examples of products required. It also covers implementing the strategic objectives in the strategic plan and monitoring progress. Finally, it provides additional details and direction for executing the Strategic Planning Committee responsibilities.

DEFINITIONS

Environmental Analysis	Environmental analysis is a tool that identifies the strengths, weaknesses, opportunities and threats of an organization. It is a basic, straightforward model that assesses what an organization can and cannot do, as well as, its potential opportunities and threats.
Major Policy Goal	A limited number of statements that translate the organization's mission into major policy directions.
Mission Statement	A succinct description of the basic purpose of the organization, including the nature of the work to be carried out, the reason it exists, and the clients and constituencies it is designed to serve.
Operational Plan	A plan which describes the specific actions that must be taken to accomplish each objective identified in the strategic plan. It should include the responsible parties, time lines, resource allocations, and an evaluation plan that identifies specific, measurable outcomes to be achieved.
Strategic Objectives	The major accomplishments that the organization seeks to achieve over a five year period. Broadly stated, they are what an organization must achieve to remain or become competitive and ensure the organization's long-term sustainability.
Strategic Planning	A systematic planning process involving a number of steps which identify where an organization is going over the next five years and how it's going to get there. It typically defines or refines the mission, vision for the future, needs (strengths, weaknesses, opportunities, and threats), major policy goals, and strategic objectives.
Vision Statement	An expression of an organization's optimal goal and reason for existence. It should be a one-sentence statement describing the clear and inspirational long-term desired change resulting from an organization or program's work.

INTRODUCTION TO STRATEGIC PLANNING

Strategic planning is a systematic process that brings consensus regarding priorities among the organization's leaders. The strategic planning process begins with a thorough examination of an organization's mission as it relates to its internal and external environments.

A strategic plan broadly maps the activities the organization should pursue to reach its desired goals; it is not a detailed chronology of action. It is a tool to guide decision making by the organization's leaders on issues that are fundamental to the organization, containing a mission statement, major policy goals, and strategic objectives. In the end, the strategic plan should:

- Establish the organization's priorities;
- Allocate human and financial resources to accomplish those activities;
- Assess whether objectives are being met; and
- Establish means to evaluate programs, staff, and resources.

Working from the strategic plan, non-profit organizations then develop coherent, focused, realistic operational plans, describing the specific actions that must be taken to accomplish each objective identified in the strategic plan.



Figure 1 – Strategic Planning Steps

A strategic plan is a statement of important, but flexible, guidelines, not rigid doctrine.

1. The process of strategic planning -- the development, implementation, and assessment of a plan -- is not a single, one-shot event; rather, it is an ongoing, continuous process, which must adapt to environmental changes, both external and internal.
2. Lessons learned over the years can help focus the strategic planning, making it more efficient and satisfying for all those involved, as discussed in the next several sections.

An overview of the five step strategic planning process is shown in Figure 1.

STRATEGIC PLANNING COMMITTEE

The Strategic Planning Committee, supported by the Homeless Coalition of Polk County, has responsibility for developing a five-year strategic plan to alleviate homelessness in Polk County. The strategic plan will include goals for reducing the numbers in each sub-population of the homeless within the Polk County area at the beginning of the planning period.

The Strategic Planning Committee also has responsibility for developing an operational plan describing the specific actions that must be taken to accomplish each objective identified in the strategic plan. It should include the responsible parties, time lines, resource allocations, and an evaluation plan that identifies specific, measurable outcomes to be achieved

This manual provides additional details and direction for executing the Strategic Planning Committee responsibilities.

STRATEGIC PLANNING PROCESS

STEP ONE - GET READY

To get ready for strategic planning, an organization must first assess if it is ready. While a number of issues must be addressed in assessing readiness, the determination essentially comes down to whether an organization's leaders are truly committed to the effort, and whether they are able to devote the necessary attention to the "big picture". For example, if a funding crisis looms, the key personnel are about to depart, or the environment is turbulent, then it does not make sense to take time out for strategic planning effort at that time.

An organization that determines it is indeed ready to begin strategic planning must perform five tasks to pave the way for an organized process:

- identify specific issues or choices that the planning process should address
- clarify roles (who does what in the process?)
- create a Planning Committee
- develop an organizational profile
- identify the information that must be collected to help make sound decisions.

The product developed at the end of the Step One is a work plan.

Obtain Support and Commitment of the Organization's Leadership

In addition to the tasks required to develop a work plan, it is critical to have the support of the Continuum of Care's Board of Directors to pursue strategic planning. In some cases, the members of the board will need to be convinced that strategic planning is necessary. There may be those who have been

through a poorly conducted process and may find little value in spending time and resources on such a "spurious" activity. Others may toss the responsibility back to staff, saying, "You know what we want. Handle it." Elected policymakers cannot just give lip service to the idea of strategic planning, but should be at the center of the planning process whenever possible.

Obtaining support and commitment of the board of directors is a two-step process. First, be sure the planning committee has done all the preparation necessary for successful strategic planning. This includes:

- Understanding the strategic planning process including the products generated and the benefits to both the CoC and to the board and member organizations;
- Laying out the support tasks required along with a timeline;
- Checking on availability of off-site locations and setting tentative dates;
- Anticipating objections and developing approaches to deal with them;
- Assist in developing the overall strategic planning process that will be used by the CoC;
- Developing questionnaires designed to assess emerging trends and critical issues;
- Developing meeting agendas;
- Identifying individuals both within and outside the organization who should participate in the process;
- Identifying persons to facilitate the group process that will allow elected leaders, key staff, and member agency representatives to focus on the issues rather than on the process.

Second, focus on gaining board buy-in. The Strategic Planning Committee must:

- Do its homework on the board of directors and agency Executive Directors. Find out their leadership styles and motivators and tap into these.
- Get a board member sponsor. Getting a respected figure to champion strategic planning will bring instant credibility.
- Prepare a persuasive, compelling, detailed case for strategic planning. You should also have an elevator pitch. This should be no longer than 30 seconds and include what you want to do and why.
- Talk plain English, not jargon.
- Focus on benefits, not features. Senior managers are not interested in technical specifications, but they will be interested in what strategic planning can do for their organization.
- Talk about value, not cost.
- Identify any potential risks and how to deal with them. The chances are if you don't point out the risks someone else will.
- Illustrate your points with examples. Demonstrate about how strategic planning will place you ahead of your competitors.
- Break your plan down into bite size chunks. Focus on areas where you can achieve early wins or a quick return on investment. This success will make senior management more likely to buy into your overall strategy.

Involve Leadership, Staff, and Other Major Constituents

The executive directors of the member agencies must also be involved in the process. They can provide perspectives not readily apparent by challenging the status quo. Their involvement facilitates the

development of a good strategic plan. In addition, opportunities must be provided to allow other constituents to participate in the process, whether through a questionnaire in the organization's newsletter or through requests for review and comment on draft plans.

STEPS REQUIRING GROUP PROCESSES

While Step 1, Get Ready and Step 5, Write Strategic and Operational Plans, are largely done by planners, Step 2, Develop Mission, Vision, and Major Policy Goals, Step 3, Assess the Situation, and Step 4, Developing Strategic Objectives, are best accomplished by a structured group of the Board of Directors and Executive Directors of member agencies as shown in Figure 1—Strategic Planning Steps.

Usually these group processes are facilitated meetings away from the office in a different environment to eliminate distractions and gives participants a clear perspective as they map out the future for their organization. Often this meeting takes the form of a 2- to 2 1/2-day leadership retreat, but can be tailored to the situation.



Figure 2 – The Strategic Planning Process

Figure 2—The Strategic Planning Process shows the relationship of the strategic planning products developed in the articulating mission and vision, assessing the situation, and developing strategies, goals, and objectives steps. This is the essential core of the strategic planning process and it is

accomplished at facilitated off-site sessions by the board of directors and member agency executive directors.

STEP TWO - DEVELOP MISSION, VISION, AND MAJOR POLICY GOALS

Mission Statement

A mission statement is like an introductory paragraph: it lets the reader know where the writer is going, and it also shows that the writer knows where he or she is going. Likewise, a mission statement must communicate the essence of an organization to the reader. An organization's ability to state its mission indicates its focus and purposefulness. A mission statement typically describes an organization in terms of its:

- Purpose - why the organization exists, and what it seeks to accomplish;
- Business - the main method or activity through which the organization tries to fulfill this purpose;
- Values - the principles or beliefs that guide an organization's members as they pursue the organization's purpose.

Strategic plans can never be well developed until the organization is clear on its fundamental mission. Most often, a number of board members cycle on and off the board each year, leaving staff to provide the continuing direction for the organization. Unless the board of directors, the chief executive, and staff are working with a clear and concise mission statement for the organization--one to which they are all committed -- those working with different perceptions of the actual mission of the organization will try to lead the organization in a different direction.

A good mission statement should be succinct, stating the non-profit's purpose and philosophy, identifying the uniqueness of the organization. It should provide the overall direction, guiding the development of the organization's goals, and its strategic objectives -- those targets for the organization's primary activities.

Vision Statement

While the mission statement summarizes the what, how, and why of an organization's work, a vision statement presents an image of what success will look like. The vision statement is the leadership's view of where the enterprise should be in the future. The vision statement is stated in general terms on key measures of importance.

A vision statement is an expression of what your organization would like to see as a possibility and a future for the community and stakeholders you serve. In drafting a vision statement for an organization, the answers to the following questions will guide you:

- What are the values or beliefs that inform your work?
- What would you ultimately hope to accomplish as a result of your efforts?

After these questions are answered, developing a vision statement is a four step process:

Step 1: Describe a key problem which the organization would like to address.

Some examples of key problems are:

- Many people in rural areas fall ill because of lack of clean water;
- High unemployment among women;

- Many households are not connected to the electric grid;
- The natural environment is threaten to different degrees all over the world;
- High degree of corruption in the society;
- Social injustice.

Step 2: Imagine the ideal situation in 10 - 20 years. Some examples of ideal situations are:

- All members of rural communities have access to safe drinking water;
- Women have equal opportunities to find a job as men;
- Households have access to affordable, environmentally friendly produced electricity;
- People live in harmony with nature;
- A world free of corruption;
- Social justice.

Step 3: Capture the image of the ideal future with key words or phrases. Examples of key words or phrases are:

- Affordable;
- Sufficient;
- Free access to;
- Equal access to;
- Every person enjoys.

Step 4: Draft the vision statement based on the key words selected in step 3. It will consist of a few lines and might start with a phrase like:

- We believe that;
- We are committed to;
- We want that;
- We seek;
- We envision.

Or a declaration of what should be the outcome of the organization's activities like to improve or to reduce.

With mission and vision statements in hand, an organization has taken an important step towards creating a shared, coherent idea of what it is strategically planning for.

Major Policy Goals

Whereas the mission statement identifies general policy directions of an organization, major policy goals specify how these general policy directions will be carried out. Major policy goals should be separated from the mission statement so that they can be used as tools to assess the success of the organization in fulfilling its mission. Goals will necessarily be broad statements, limited in number, and focused on the unique characteristics of the organization. Once you have developed your vision and mission you can then develop the major policy goals needed to achieve your vision.

Major policy goals are general statements of what you want to achieve. So they need to be integrated with your vision. They also need to be integrated with your mission of how you are going to achieve your vision. Examples of major policy goals are:

- To increase service area;
- To increase efficiency;
- To provide better client service;
- To improve employee training;
- To reduce carbon emissions.

A goal should meet the following criteria:

- Suitable: Does it fit with the vision and mission?
- Acceptable: Does it fit with the values of the organization and its members?
- Understandable: Is it stated simply and easy to understand?
- Flexible: Can it be adapted and changed as needed?

Make sure the major policy goals are focused on the important properties of the organization. Be careful not to set too many goals. You run the risk of losing focus. Also, design your goals so that they don't contradict and interfere with each other. Goals not relevant to the non-profit's mission should not be pursued; they would be a distraction for the organization.

At the end of Step Two, a draft mission statement and a draft vision statement are developed and major policy goals are set.

STEP THREE - ASSESS THE SITUATION

Once an organization has committed to why it exists and what it does, it must take a clear-eyed look at its current situation. Remember, that part of strategic planning, thinking, and management is an awareness of resources and an eye to the future environment, so that an organization can successfully respond to changes in the environment. Situation assessment, therefore, means obtaining current information about the organization's strengths, weaknesses, and performance - information that will highlight the critical issues that the organization faces and that its strategic plan must address. These could include a variety of primary concerns, such as funding issues, new program opportunities, changing regulations or changing needs in the client population, and so on. The point is to choose the most important issues to address. The Planning Committee should agree on no more than five to ten critical issues around which to organize the strategic plan.

It is critical to understand the organization's position in society -- how it is affected by trends, challengers, competitors, and other interested parties. One must also thoroughly understand all internal aspects of the organization--its constituents, structure, technical and economic capabilities, and culture.

Through an environmental analysis, the organization's leaders can identify these external trends/issues that may have an impact on the organization. Generally, it is helpful to begin with categories of trends to be analyzed, such as the following:

- Sociologic/demographic ;
- Economic/financial;
- Technological/ scientific;
- Political/legislative/regulatory;
- Professional/educational.

Determine how each of these categories affects your organization. For example, current economic trends affect all organizations; however, the impact on each non-profit may be different, depending on

its mission and its usual source of funding. A social service non-profit may depend heavily on state grants, which may be cut because of state financial difficulties; another non-profit may look to philanthropic foundations and must therefore assess whether it can maintain or even increase their support.

An analysis of the internal environment means assessing the organization's strengths and weaknesses in all aspects of the organization:

- Communication and marketing capabilities;
- Constituents' satisfaction with the organization;
- Governance and staffing structures;
- Culture of the organization--as perceived both internally and externally;
- Financial and human resources;
- Technological and scientific capabilities.

Leadership and constituent questionnaires are often used to assess both the external and internal environments. These questionnaires may also be sent to interested outside organizations and individuals to obtain their perspectives on the organization. Other sources of information also may be available through other data collected by the organization, as well as through meetings and current publications.

An environmental analysis is critical. Without a good, clear understanding of the trends both within and outside the organization, a "strategic" plan cannot be developed

A common tool to assess the situation is SWOT analysis. It is a highly effective tool for understanding and decision making for all businesses including non-profits. SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats. The tool can be used for business planning, strategic planning, competitor evaluation, marketing, product development and more.

The SWOT analysis template is normally presented as a grid, comprising four sections, one for each of the SWOT headings: Strengths, Weaknesses, Opportunities, and Threats. An example SWOT chart including some example information from a non-profit is displayed below:

<p>Strengths</p> <p>High Demand for Services</p> <p>One major donor</p>	<p>Weaknesses</p> <p>Lack of community awareness</p> <p>Under developed board of trustees</p>
<p>Opportunities</p> <p>Public service grant request for proposals soon to be announced</p> <p>Developing links with the business community</p>	<p>Threats</p> <p>Other more established non-profits complete similar work</p> <p>Limited financial reserves</p>

Figure 3—SWOT Grid

Strengths and weaknesses describe where the project or organization is now: the existing resources that can be used immediately and current problems that won't go away. It can help identify where new

resources, skills or allies will be needed. Both refer to technical, financial, promotional, networking, knowledge or competency based factors internal to the program. When thinking of strengths it is useful to think of real examples of success to ground and clarify the conversation. Strengths are those things that are working well in a project or situation. The aspects people are proud to talk about and which differentiate the program from others. Weaknesses are those things that have not worked well or that the organization is less efficient in than other organizations.

Opportunities and threats describe what is going on outside the organization, or areas which are not yet affecting the strategy but could do. Opportunities include ideas on how to overcome weaknesses and build on strengths within the environment the program operates in. Threats are things that constrain or threaten the range of opportunities for change in the program environment. These external aspects are often related to sociological, political, demographic, economic, trade-specific and environmental factors.

Strengths

This portion of the chart provides the opportunity to list everything that is good about your non-profit. As well as the two example strengths listed above, other common strengths in non-profits are volunteer manpower which supplies organizations with substantial amount of free labor and huge savings on staff costs. Additionally, the non-profit might offer a new, innovative product or service, or it might have an extensive network through which it can share resources and communicate about its services. Other strengths can include its location, its funder base, and its expertise. Many larger non-profits also enjoy a long history which affords them a good, solid reputation in their communities. These strengths can be harnessed to execute new plans for the non-profit's future.

Weaknesses

The weakness section enables you to list all of the deficiencies of your organization. Everything that causes you a problem in the management of your non-profit should be included here. The most common problem for most non-profits, especially ones in their first years, is the lack of financial stability in terms of income, expenditure and reserve levels. Typical weaknesses include small staffs and scant resources. If a non-profit wants to deliver services to 100,000 people as part of its strategic plan, weaknesses like these need to be considered. Other less noticeable weaknesses include being not so unique, a board that has little resource development experience, and an unclear mission. In addition, having had bad press or any recent damage to reputation can be a severe weakness that is hard to overcome. Weaknesses normally focus on internal issues that you can work to resolve, but can also include outside weaknesses beyond your control.

Opportunities

These factors tend to focus on outside opportunities such as new grant availability and the development of local business relations, but can just as well be used to evaluate internal opportunities including staff that are quickly developing and the contacts of a board of trustees member. You should try to look towards emerging developments around your non-profit that may provide new options in the near future as well as opportunities that are immediately available to your organization. For example, many non-profits found niches in assisting families with rising unemployment and foreclosures in the recent economic downturn. Likewise, others have filled the spaces left by non-profits that also faltered in the economy. Even in a saturated non-profit market, opportunity lies in joining forces. If you merge or form an alliance with like-minded organizations, the banded effort could reach more people and share the funding.

Threats

Non-profits are particularly vulnerable to financial threats and shocks. This is because non-profit organization's often have less secure income streams combined with often just a few months of financial reserves. This situation results in non-profits that can be perilously prone to major economic shifts. Changes in priorities from a major grant provider or local authority could mean a non-profit is suddenly without its major revenue stream with no backup plan. These are the type of threats that you should use in your threats quadrant, essentially anything that could happen that could jeopardize the success of your non-profit.

Just because they don't operate to produce a profit doesn't mean non-profits don't have competitors. Threats that non-profits typically encounter include very large non-profits expanding into their base service areas and other non-profits producing the same services. In addition, foundations frequently cut back on funding or change their own priorities. Donors also experience "fatigue" and stop giving, or give a smaller amount.

Once you have completed your SWOT analysis you will be far better able to produce a strategic plan that incorporates all of the listed elements and provides a guide for future growth and expansion.

Major Policy Goals	Supporting Strategic Objectives
Reduce Time Spent Homeless	Increase number of permanent supportive housing units for individuals and families. Increase in the number of homeless households with children assisted through rapid re-housing programs. Work with Public Housing Authorities on Section 8 and rapid re-housing.
Increase self-sufficiency	Increase access to support services implement voluntary supportive services in the CoC
Prevent Homelessness	Increase outreach to at-risk populations through the provision of rent, utility payments, vouchers, transportation, and financial assistance at critical times to prevent homelessness. Identify prevention partners in the CoC geographical area such as landlords/ property managers and school social workers and provide contact numbers for coordinated assessment centers

Figure 4— Examples of Major Policy Goals with Supporting Strategic Objectives

The products of Step Three include: a data base of quality information that can be used to make decisions; and a list of critical issues which demand a response from the organization - the most important issues the organization needs to deal with.

STEP FOUR - DEVELOP STRATEGIC OBJECTIVES

Evolving from an organization's mission, vision, and major strategic goals should be the major accomplishments (strategic objectives) the organization seeks to achieve over a specified period of time (e.g., five years). Organizations use a number of terms to identify these major accomplishments. Often, strategic objectives are confused with the more general policy directives (goals). The difference is the level of specificity. The term strategic objective is used to identify the major accomplishments the organization hopes to achieve in a defined time frame that address the critical, strategic issues identified during the environmental analysis. It is important to note that strategic objectives may relate to one or more of the organization's goals.

More specifically, strategic objectives should:

- Support the mission and goals of the organization;
- Provide clarification of the goals;
- Translate the critical, strategic issues identified for the organization into specific policy directions;
- Provide the foundation for the development of detailed operational for the organization; and
- Provide the basis for assessing the organization's accomplishments.

Of major importance is that strategic objectives should not only respond to the needs of constituents, but also be realistic with respect to the organization's environment, both externally and internally, including the available human and financial resources required to accomplish them.

Figure 4--Examples of Major Policy Goals with Supporting Strategic Objectives provides some examples of major policy goals and the strategic objectives which support them. All strategic objectives are to be met within the term of the strategic plan; however some may have shorter target completion dates.

The product of step four is an outline of the organization's strategic directions--the long-range goals and specific objectives of its response to critical issues.

STEP FIVE – WRITE STRATEGIC AND IMPLEMENTION PLANS

Writing the Strategic Plan Based on the Strategic Objectives

The mission has been articulated, the critical issues identified, and the goals and strategies agreed upon. This step essentially involves putting all that down on paper. Usually one member of the Planning Committee, the executive director, or even a planning consultant will draft a final planning document and submit it for review to all key decision makers (usually the board and senior staff). This is also the time to consult with senior staff to determine whether the document can be translated into operating plans (the subsequent detailed action plans for accomplishing the goals proposed by the strategic plan) and to ensure that the plan answers key questions about priorities and directions in sufficient detail to serve as a guide. Revisions should not be dragged out for months, but action should be taken to answer any important questions that are raised at this step. It would certainly be a mistake to bury conflict at

this step just to wrap up the process more quickly, because the conflict, if serious, will inevitably undermine the potency of the strategic directions chosen by the planning committee.

Typically, group consensus on all of the preceding retreat agenda items are captured on flip chart paper as they are developed, then taped to the walls of your meeting room so everyone can review them as the discussion continues. The individual who facilitates the strategic planning session is generally the person who develops summaries as the meeting progresses and prepares a first draft of your strategic plan (the draft strategic plan) for all retreat participants to review. Comments returned to the facilitator are incorporated into the organization's final draft, which can then be submitted to other constituents for their reactions.

To summarize, a strategic plan that focuses on the next three, four, or five years will not be a lengthy document; rather, your plan should consist of the following five items:

1. Introduction, which may include:
 - (1) The process the leadership pursued to develop the strategic plan;
 - (2) A summary of the environmental issues, documenting those identified as "critical" issues; that is, having a high impact on the organization and a high probability of occurrence; and
 - (3) Identification of the organization's strengths and weaknesses in addressing those critical issues;
2. The organization's mission statement;
3. Statement of goals ;
4. Strategic objectives .

The product of step five is a strategic plan.

Implementing The Strategic Plan

An operational plan should accompany the strategic plan. Generally, staff will prepare the bulk of the operational plan, with guidance and final approval from the board of directors.

An operational plan describes the specific actions that must be taken to accomplish each objective identified in the strategic plan. It should include the responsible parties, time lines, resource allocations, and an evaluation plan that identifies specific, measurable outcomes to be achieved. The strategic plan, therefore, focuses on the what, whereas the operational plan will focus on the how. Without the accompanying operational plan, the strategic plan will languish on the shelf, perhaps serving as a reproach for what was not accomplished, but providing no real guide to action. Details within the operational plan should include:

- Tactics: Identify what should be done; that is, outline the specific tasks that must be accomplished to achieve the strategic objective.
- Time lines: Include exact dates (month and year) when each tactic should be completed.
- Responsible parties: Identify those individuals (staff members, board members, committee chairs, or others) who will be held responsible for accomplishing each task.
- Resource requirements: Identify all resources required to accomplish each task, including funding for supplies, equipment, staff time, board travel, etc.
- Anticipated results: Specify the desired or anticipated results and what will be accomplished according to the selected time line.
- Evaluation measures: Outline how you will determine that each task has been completed or that success has been achieved.

Monitoring The Implementation Plan

Now that the organization has a strategic plan and an accompanying operational plan, it is incumbent upon the executive director to monitor the plans and provide updates to the board of directors on the organization's accomplishments in achieving the plan's strategic objectives. Mechanisms should be established, through a committee or staff assignment, to monitor and assess impending threats or opportunities and to recommend changes in the organization's course.

Again, there are two maxims to remember as you move through the strategic planning process:

- A strategic plan is a statement of important, but flexible guidelines, not rigid doctrine.
- The process of strategic planning-the development, implementation, and assessment of a plan-is not a single, one-shot event; it is an ongoing, continuous process that must adapt to environmental changes, both externally and internally.