



STRATEGIC PLANNING

Creating A Mission Based Desired Future

*“A man’s mind plans his way,
but the Lord directs his steps and makes them sure.”*
(Proverbs 16:9, Amplified)

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This booklet is dedicated to all those who provide services to alleviate human suffering and enhance healing and restoration of the body, mind, and spirit as a practical example of Jesus Christ's healing ministry.

The idea for this booklet came out what the author perceived as some of the struggles individuals were having with the whole idea of strategic planning. The first version of this booklet focused only on long term care facilities. However, as the author began to do workshops on strategic planning, the idea of revising the booklet, making it more generic and “user friendly” became a goal.

The author wishes to thank all individuals who have attended one of the strategic planning workshops in the past year as their participation helped to shape this final document. The author also wishes to thank many of her colleagues in the Social Services Department who provided valuable suggestions and editorial comments.

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1996.02.02

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STRATEGIC PLANNING MODEL

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Where there is no vision, the people perish.

Proverbs 29:18

Fear not the future. God is already there.

PART A

INTRODUCTION

1. WILL STRATEGIC PLANNING BENEFIT YOUR CORPS OR SOCIAL SERVICES CENTRE?

1.1 Where Are You Going? - Helping Alice Get Out of Wonderland

"Would you tell me, please, which way I ought to go from here?" asked Alice.

That depends a good deal on where you want to get to," said the Cat.

"I don't much care where --," said Alice.

"Then it doesn't matter which way you go," said the Cat.

"So long as I get somewhere," Alice added as an explanation.

"Oh, you're sure to do that," said the Cat, "if you only walk long enough."

Familiar lines from Lewis Carroll's "Alice in Wonderland". Alice didn't care where she was going -- what about you? Do you know where your corps or social services centre is heading? Do your centre's¹ members have a clear sense that their activities reflect where the centre would like to be in the future? If you're like Alice and don't really care where you go, then reading this booklet will not be helpful, **BUT** if you want to make sure the

¹ The term "centre" is used throughout this booklet for reading ease, it refers to any Salvation Army corps or social services program/facility.

road the centre is travelling down is leading the centre to its destiny -- its future --, then read on.

Which of these questions are important to your centre?

- Why does the centre exist? What is its mission?
- Where does the centre want to be in five -- ten years?
- What kind of centre should it be?
- What are the community needs? Which community needs can the centre meet as part of its mission and vision?
- How does the centre relate to the external church and/or the social services system of which it is part?
- How is the centre affected by the external church and/or the social services system of which it is part?
- Where is the centre going to focus its attention (e.g. programs and services²) to meet community needs?
- Who are some of potential internal and external partners and what are some of the potential linkages the centre should be exploring and developing?

These are important questions that should be addressed by all centres on a regular basis. Using a model or framework to answer these questions can make it easier and result in planning that is mission focused, realistic, and user friendly.

Planned change is conscious, intentional, collaborative effort, empowered by the Holy Spirit, to improve the life and ministry of the centre through the use of valid knowledge.

This booklet describes a planning model that

- ✓ is based on mission and vision;
- ✓ is practical; and
- ✓ is easy to use.

² The term "services" in this booklet means broadly defined services or programs. It is not referring to individual worship services.

Part one provides an introduction and key points about a strategic planning process. Part two contains a strategic planning model including suggestions for each step. The model is not a short cut to planning but it will encourage individuals and groups to think and plan strategically about who they are and where they are going as an organization.

Strategic Planning will assist any centre that needs to:

- establish directions and priorities for programs and services
- review and understand the community and congregational needs
- develop a logical basis for future decision making and resource allocation
strengthen partnerships
- understand the implications of the changing environment
- improve the centre's performance
- prepare for, and participate in, regional planning

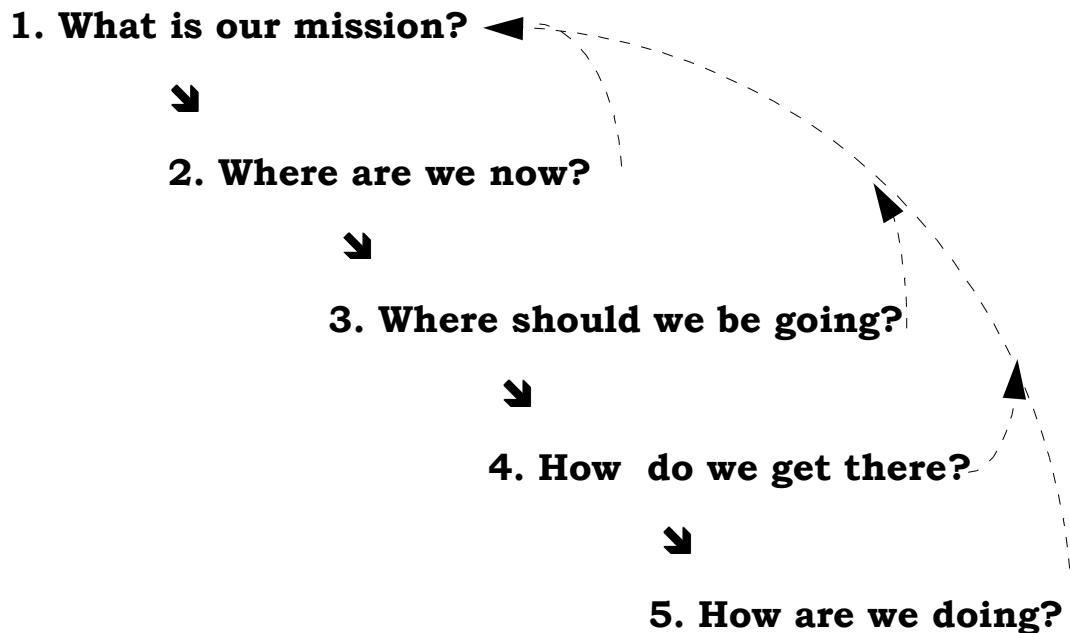
It has been designed as a guide for corps and social services centres in the Canada and Bermuda Territory and uses language and examples reflecting its target audience. However, the basic principles and steps can be applied to any organization, program, or group committed to planning strategically.

1.2 Planning In a Changing Environment

Today, most centres operate in an environment driven by change over which they have little or no control. Erratic, sudden changes can threaten the survival of a centre and affect its activities in unexpected ways. Turbulence not only presents threats and risks to a centre, it also offers opportunities and challenges. It is important that centre leaders develop the skills to see and understand the implications of the changes which will affect the way the centre worships and ministers to its congregation and community under the guidance of the Holy Spirit.

Strategic Planning is necessary if a corps/centre expects to be viable and continue to meet the needs of the community. Strategic Planning will not protect the status quo but it will result in a plan that will allow the corps/centre to move forward in fulfilling its mission and vision.

Planning is an important part of any organization wanting to be viable for the future. If we accept that change is constant, then developing a systematic approach for handling change in a constructive and helpful manner would be beneficial. Many planning tools are developed with this objective in mind but lack clear concepts, or are too complex and complicated to be used effectively. The strategic planning model presented in this booklet involves a relatively simple 5 step process that focuses on:



Planning strategically means making decisions based on mission and vision

Strategic planning is not the same as operational planning in that it has a different focus. Operational planning is what is done on a daily, monthly, or annual basis and looks at activities, programs, and budgets. Strategic planning is reviewing, planning and implementing decisions based on the mission and vision of the centre and provides the direction and purpose for the operational planning. Planning strategically can make the assessment, development, and implementation phases of operational planning more effective. Operational planning with no overall sense of purpose or understanding of current conditions, or vision of what the centre wants to become, can prove to be fruitless and even counterproductive. The important principle which should guide all operational

planning is that daily decisions and annual budgets should be developed in order to move the centre towards achieving its mission and vision.

The journey of 1000 miles begins with a single step.

-Chinese proverb

2. GETTING STARTED

2.1 Criteria For Successful Planning

Is strategic planning what your centre needs? Are key personnel within the centre ready to undertake the task? A quick mental check-up will help to indicate the centre's personnel willingness and ability to do some serious planning.

- Are the questions outlined in part one of the introduction **important and relevant** to the centre?
- Is there **recognition** by most or all of the key personnel within the centre that a **planning process** is required? (Key personnel in a corps include local leaders members, Corps Council members; in a social services centre - senior management team, Community Council; in both - the informal leaders of the organizations)
- Are the **key players willing to commit** the necessary time and other resources to establish the process and keep it on track?
- Are the key personnel **willing and able to provide leadership** to the planning process?
- Is there **sufficient capability** in key corps members/centre staff members to begin and carry through with the process?
- Is **teamwork and cooperation** present among key players?

If you answer "no" to any of the above, it is recommended that effort be directed towards turning the "no" into a "yes" before a strategic planning process is started.³ However, if you can answer "yes" to the above questions, the centre is likely in a reasonable and

³ This booklet does not discuss turning "no" into "yes". There are many excellent leadership and team building resources available. Contact the Social Services Department or DHQ for more information.

"ready" position to undertake a strategic planning process. What will help to make the planning process successful and achieve meaningful results?

- ✓ Planning to plan
- ✓ Getting others involved and motivated
- ✓ Educating and communicating
- ✓ Being open and flexible

2.2 Planning To Plan

There is a need to establish a planning process that involves the development of a Strategic Planning 'work schedule'. The 'work schedule' will be specific to the needs of the centre and will be influenced by both internal and external factors. Items to include in the work schedule plan should be:

- individuals involved - internal and external stakeholders
 - e.g., project coordinator/facilitator, task force groups/committees
- major steps to be undertaken and tasks to be assigned
- time span for the strategic planning process
- educational sessions

2.3 Getting Others Involved And Motivated

The Strategic Planning process requires a significant investment of time, energy, and human resources. To be effective, commitment from the top is essential; yet this is not a project for the Corps Officer or Executive Director alone! It should be seen as an **organizational wide project** with individuals from all levels and sections involved in some aspect of the process. The outcome will affect every corps member and/or staff member; thus getting input from all levels will increase the effectiveness and ownership of the process and plan. By involving those affected by the plan, an organization-wide understanding and commitment to the strategic planning process will result in "ownership" by participation.

No involvement - No commitment!

An effective way to motivate members is by using a team work approach. Setting up committees or task forces to complete the various tasks will spread the workload around. Setting up a planning committee responsible for the overall process and then sub-committees or individuals for various parts of the process is a popular way to approach the task. Often representative members from the Corps leaders and Corps Council, or the centre's Community/Advisory Council and senior management team form the core of the planning committee. It is strongly recommended that organizers get representation from all areas/sections of the centre. Look for some of the informal or natural leaders or the individuals who are showing leadership potential. The informal leaders can often provide good motivation for all members and potential leaders can be given opportunity to develop some leadership skills.

An effective planning process must also involve external stakeholders. It is vital to know who the key external stakeholders are in your area of ministry and involve as many of them as possible in various ways in the planning process.

Consider what involvement the following individuals will have in the various steps of the planning process:

- ✓ *Board/Council members*
 - ✓ *Senior management/managers*
 - ✓ *Program/service staff*
 - ✓ *Soldiers/Adherents*
 - ✓ *DHQ/THQ Staff*
 - ✓ *Other Salvation Army Corps/Centre members*
 - ✓ *Other agencies, organizations and institutions*
 - ✓ *Government/funding sources*
 - ✓ *Clients*
 - ✓ *Referring organizations (those referring clients to you and those that you refer clients to)*
 - ✓ *Neighbours/General Public (those who may use your services or programs in the future, those who may oppose your plans)*
 - ✓ *Any others relevant to your area of ministry*
-
-

2.4 Educating And Communicating -- Be Challenge!

There is a need to provide adequate learning opportunities for individuals involved in the strategic planning process. Many of the concepts and principles of strategic planning are not new, but the framework in which they are presented may be new for some individuals. In addition, bringing those involved to a understanding of the strategic planning model your organization is using will be beneficial. A common knowledge and language base (e.g., definitions), is important, especially if key individuals have had some experience with strategic planning before. (A suggested glossary is found in Appendix A). Educational resources are available through a variety of sources including, local libraries, management consulting firms, Divisional Headquarters and the Social Services Department at Territorial Headquarters.

Make sure all participants are using the same language. individuals from various backgrounds may have different meaning for the same term. Take time at the beginning of the process to clarify the definitions of key words and concepts.

Part of the focus of the initial meeting with those most involved in the planning process (e.g., Planning Committee, subcommittees) should be to discuss attitudes, expectations, and learning needs. For some, the whole concept of strategic planning may be a frightening and overwhelming experience. Feelings may be expressed:

- "no time for that kind of stuff",
- "what has this got to do with saving souls?"
- "too busy with day to day things",
- "what's the point of planning, the government funding dictates what we do or don't do"
- "we don't need it, we are doing fine",
- "that's the administrator's/corps officer's job, not mine",
- "I have no knowledge of this type of stuff - I cannot add anything".

These feelings need to be acknowledged and turned into opportunities and building blocks rather than stumbling blocks.

As the analysis process is started and information is collected, some of the strengths, weakness, opportunities and threats to an organization will begin to emerge. Individuals need to be allowed to think about and express some of the possible positive and negative outcomes early in the process, e.g. resources may be redistributed as a result of the planning process. Early dialogue on some of the potential outcomes will provide some preliminary reaction to changes and new directions that may result. Early discussion will assist the centre

- in the ongoing development of the plan;
- in beginning to explore areas for future expansion;
- in ‘red flagging’ areas that may require additional discussions; and
- in development of communications and community/public relations plans.

To increase ownership you will want to get as many individuals involved in the process as possible. Not everyone will want direct involvement, nor, it is always possible to have everyone involved however it is important to keep both internal and external stakeholders informed about what is going on. Bulletins, newsletters, poster boards, letters, “townhall meetings” are various ways to keep people informed of the process. Asking for feedback along the way is also beneficial. Feedback opens up opportunity for all to provide their opinion on areas of importance or concern to them, especially for those not directly involved.

Allow flexibility to readily adapt to the changing environment.

2.5 Being Open And Flexible

The strategic planning process typically is undertaken to cope with changes happening in the internal and external environment. Since change is ongoing the strategic planning process needs to be flexible. There are no absolutes in strategic planning, no ‘right’ or ‘wrong’ ways for planning. The process must adapt itself to the changing environment of the times. Even the best effort at designing a ‘work schedule’ and time table may require modification because of changing circumstances. Remember, a change which at first may appear to be negative, may in fact lead to more opportunities and challenges!

It is also important to allow adequate time for the process. Setting a realistic overall time frame for the planning process and taking into consideration local conditions and circumstances (e.g. type and amount of information to be gathered, involvement of outside agencies -- government), helps to keep the process on track. Completing the plan before implementing the plan is also vital! It is equally significant to realize that setting a time frame does not mean that once the plan is complete the process is finished. Strategic planning is a process that should be ongoing. In actual fact, the process is as important as the plan -- maybe even more important because the process will encourage a new way of thinking -- a paradigm shift -- from crisis management to mission based management.

It is far better to risk over-investment of time in productive planning than to rely on ad hoc solutions to unpredictable problems.

- Richard Sloma

I was thinking of installing one of those automatic garage door openers over the weekend. The directions said "Make certain the garage door is square and straight and the garage floor is level." Directions always read like that. Is everything in your house straight, square, and level? If my house was straight, square and level, I would never have to fix anything. What we all need is directions that tell us what to do when everything is crooked, off-centre and all messed up.

Andy Rooney

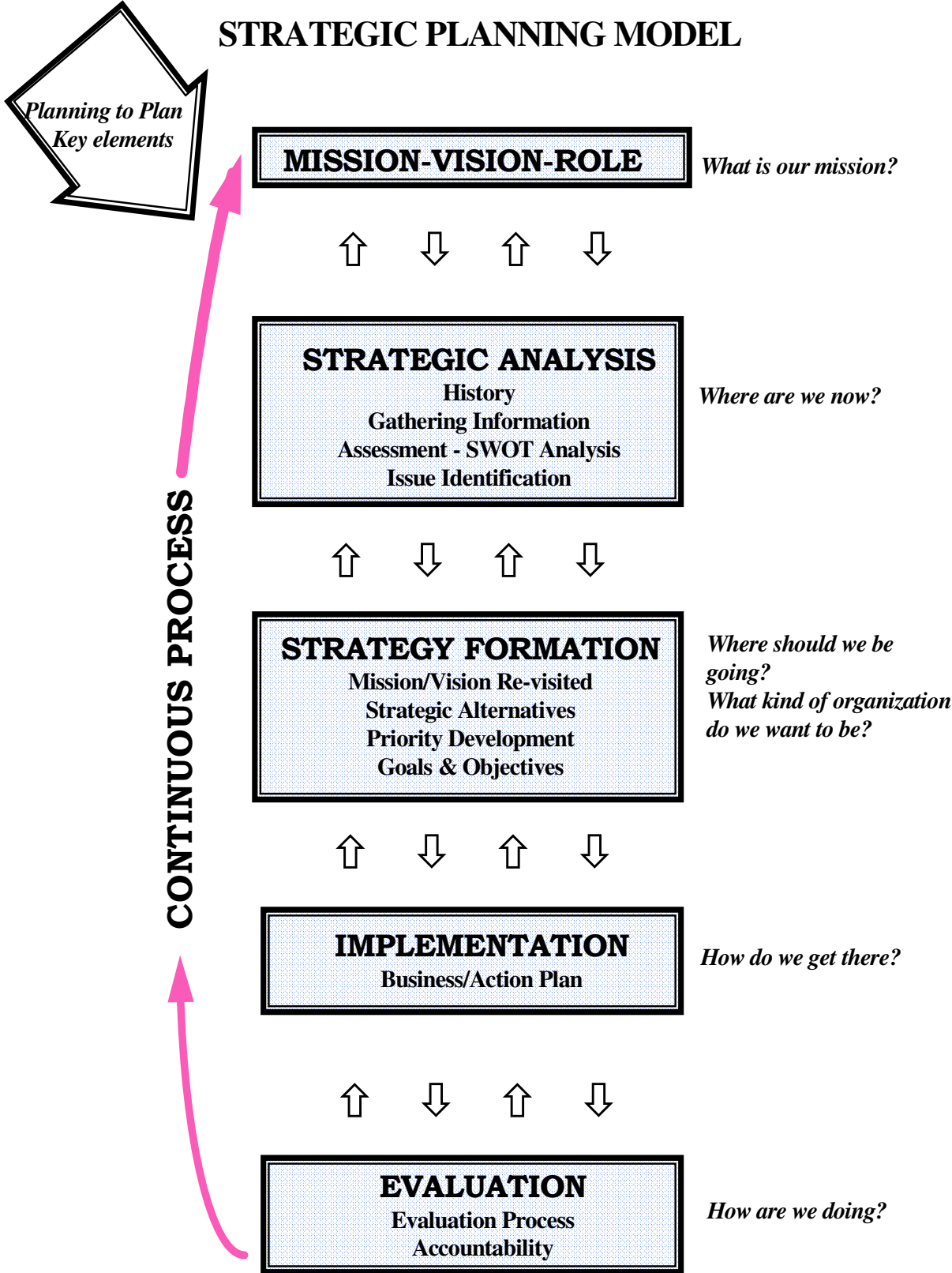
PART B

THE STRATEGIC PLANNING MODEL

3. INTRODUCTION

In this section, each step of the planning model will be described and suggestions are given for the type of information to include. As with most management processes, there are various ways to create the plan. The following model has been developed to show what steps can be taken and what some of the basic content could include. You may want to expand in some sections and reduce or combine information in other sections.

The diagram provided summarizes the strategic planning process. (see page 16) The arrows between each boxed segment point in both directions because planning is a continuous process. While the process tends to flow downwards, each step depends on the previous steps and it is expected there will be movement back and forth. For example, step four (*how do we get there?*) will be impacted by both step two (*where are we now?*) and step three (*where should we be going?, what kind of organization do we want to be?*), and each step depends on step one - (*what is our mission?*).



4. STEP ONE - WHAT IS OUR MISSION?

Prayer For Beginnings

Loving God, we come to you for your blessing as we begin an exercise in enriching our directions and horizons for this ministry. As parents guide their children, so we ask for your guiding hand on us today. It is with your strength that we will be able to acknowledge the problems and issues facing us.

O God, we ask you to help us combine the intellectual and spiritual gifts you have given us. Give us the courage to face the realities of our community, help us to see clearly what they represent. We acknowledge our inadequacy to address the problems and issues, So we seek your guidance to what courses we should take, for the sake of the world you love and for your glory. We ask this through Christ Jesus our Lord.

Amen

The first step is to clarify the mission of the centre by answering the question "why do we exist"? The organization's mission and vision are critical elements of a strategic planning process. Key strategies for the future must be developed to flow from the organization's mission, vision, values, and resources.

4.1 What is Mission?

Mission is the purpose of the organization or the reason it exists. It indicates the focus of the organization and provides a sense of direction. The concept of mission is one that is almost overused in secular organizations. The mission statement has simply become a statement of what the organization does, to whom and how. In a Christian environment, however, the concept goes much deeper, embodying our values and beliefs, as well as what we do. Mission springs out of our history as an organization (*who we are*), directs our mission (*what we do*) and is guided by our organization's culture (*how we do it*). It is important for each centre to know what its unique mission is (*why does it exist? - what is it trying to accomplish?*) in relation to the overall mission of the territory and The Salvation Army.

Broadly stated, the overall mission of The Salvation Army is to save souls, grow saints and serve suffering humanity. The Canada and Bermuda Territory has defined this overall mission into the following statement:

Territorial Statements

Identity Statement.

The Salvation Army is an international Christian Church. Its message is based on the Bible; its ministry is motivated by love for God and the needs of humanity.

Mission Statement

The Salvation Army exists to share the love of Jesus Christ, meet human needs and be a transforming influence in the communities of our world.

This is a fairly expansive statement, but it is the guide for all corps and centers in the development of their own mission statement. Each organization or group that is part of a larger organization must ensure that its mission statement correspondences, and does not contradict, the parent organization's mission statement.

Developing a Mission Statement

The process of developing a mission statement for a centre is an exciting adventure. For the mission statement to have meaning and purpose, all members should be allowed to be part of the process of determining what the organization is all about. If you want the members to be committed to what the organization's purpose is, they must be involved. As Steven Covey, the business and management guru of the 90's writes, "An organizational mission statement that truly reflects the deep shared vision and values of everyone within the organization creates a great unity and tremendous commitment. It creates in people's hearts and minds a frame of reference, a set of criteria or guidelines, by which they will govern themselves."⁴

Key elements to include in the center's mission statement:

1. References to the roots from which the organization comes.
 - e.g., gospel; "charisma" of The Salvation Army

⁴ Steven R. Covey "The Seven Habits of Highly Effective People" Simon & Schuster, 1989. p. 143

2. A phrase or statement outlining the reason the organization exists.
 - e.g., dedicated to the wholistic mission of the Salvation Army
3. A description of the distinctive cultural characteristics of the organization.
 - ideas like faith, heritage, hospitality, tender, compassion, unity, commitment
4. A commitment to a specific group of persons it will serve.
 - e.g., corps members, clients, residents, families, staff, community
5. A description of the nature of the service(s) the organization intends to offer.
 - e.g., food, clothing, shelter, counselling, care of the elderly, fellowship, spiritual growth
6. An indication of the future direction of the organization to which the broader society may hold the organization accountable.
 - use action, positive words - promote, provide, encourage, support
7. Key words rich in meaning to the organization.
 - e.g., we, community, Church, compassion, strive, care/caring, healing mission, gospel inspired, committed, alleviate
8. A clear, succinct statement that is clear to the public the unique contribution which the organization hopes to make to its community.

4.2 What Is Vision?

We started by stating that the organization's mission and vision are critical elements of a strategic planning process. The mission statement is a concise statement of the fundamental purpose and scope of an organization. The vision statement is affiliated to the mission statement and can be described as the concrete version of the mission statement. The mission statement tends to be abstract or philosophical in nature while the vision statement is concrete and should provide a picture of the centre's desired future. The vision statement articulates direction and choice, uniqueness of purpose and differentiation from other organizations. It takes a longer perspective, serving as the foundation for the hard, specific and measurable target of short/medium term objectives.

In organizations where there is a clear vision, the probability of success, or growth, in fulfilling the mission is high.

The Chart below is a brief summary of the difference between mission and vision statements.

Mission Statement	Vision Statement
<ul style="list-style-type: none"> ▪ direction, general heading, reason for being ▪ abstract ▪ definition of key ministry objectives ▪ broad, general statement about what you plan to accomplish ▪ is philosophical in nature ▪ <i>Example</i> - Advancing man's capabilities for space exploration 	<ul style="list-style-type: none"> ▪ specific destination, picture of a desired future ▪ concrete ▪ clarification of specific directions ▪ specific, customized, distinctive and unique direction - may be detailed ▪ is strategic in character ▪ <i>Example</i> - Man on the moon by the end of the 1960's

What if the centre has no mission or vision statement? Should they be developed at this stage of the planning process? **Yes - but... Yes**, because the centre needs to have a clear sense of what it is all about and what it is trying to accomplish. **But** developing mission and vision statements takes time, patience, and involvement. Get the process going, perhaps through establishing a committee which will be responsible for the process of development and drafting key ideas and concepts and a draft statement. But in order to keep the momentum going, continue with the next step in the planning process as the group continues to grapple with getting the right words and phrases of the mission and vision statement on paper. Strategic planning is a continual process and the mission and vision will be revisited in the remaining steps.

Continuing the planning process while further refining the written statements also has the advantage of clarifying that the organization's mission and vision make sense, are relevant, and realistic to community need. For example, suppose a centre's mission is to provide elderly residential care in a Christian environment. In going through step 2 the centre finds there is an over abundance of residential care in the community but major needs in other types of elderly community based care programs. The centre decides that it wants to continue to provide Christian based elderly care but will change its mission and vision focus to community based care.

5. STEP TWO - WHERE ARE WE NOW?

Once we have determined the mission and vision, or at least have a fairly good idea of where the centre wants to focus, the next step is looking at "Where Are We Now?" This step involves:

- gathering information and data about the internal and external environment;
- looking at the organizations strengths, weakness, opportunities, and threats; and
- setting some priorities in relation to the mission and where the organization wants to be or should be going.

Prayer for Understanding Our Times

Dear Jesus, our friend and Saviour, you who experienced our earthly environment, we ask for your help to understand both our own humanity and our rapidly changing times. You understood so well the turbulent times in which you lived, with all its momentous and unprecedented events.

We ask for your presence and guidance as we begin this second step in this thinking process. Give us your eyes to see our changing world, and your understanding to what is required from your Church to serve our community. Help us to identify those factors in our environment that will present our corps family with both challenges and opportunities. Give us the insight to understand what must be done, and the strength and perseverance to see it through.

In Jesus' name, Amen

5.1 Gathering Information

The first part of step two is gathering data about the centre. In this step what you are trying to do is paint a picture of where the centre is compared to the internal and external

environment. The internal environment includes those factors within the control of the centre (e.g. programs, human resources, physical building). The external environment includes those factors outside of the control of the corps/centre (e.g. demographic trends, society trends and influences).

Obtaining this information can be time consuming, but it is important that the most accurate and up-to-date information is obtained *in the time available*. It should be emphasized that all information will never be obtained and there must be a balance between determining what information is crucial to have, what information will be beneficial in making decisions and what information would be nice to have, but will have little or no relevance to the final decisions that will be made.

It is helpful to set some targets on the type and amount of information you believe will be required and the length of time it will take to obtain the information. Be as realistic as possible and allow for some flexibility or contingency plan if the information is not as easily accessible as first thought, or if it takes longer to get the data than originally planned.

Different methods of obtaining the information are available and should be used to provide a broader base of accuracy and reliability to the information.

Statistical information can be obtained from a number of areas including

- Organization's own information system (e.g., weekly, monthly, annual stats)
- Appropriate municipal, provincial and federal bodies (e.g., Stats Canada, City Planning Department, Ministry of Community & Social Services; Public Health Department)
- Local or regional planning organizations (Many communities have such organizations made up of concerned citizens or groups)
- Issue or disease specific organizations (e.g. Canadian Cancer Society, Addictions Research Foundation, Senior's groups)

Past reports and studies done for the centre or in the centre's area of ministry are also valuable resources for obtaining information. Examples include annual reviews, annual reports, property/building inspections or reviews, external reviews by government or professional associations, questionnaires, and need assessments studies. It is a good idea to check with the community and areas of ministry to find out what information is out

there, what studies have been done recently, and what is currently being studied or reviewed.

Descriptive information can be obtained from a variety of methods. Outlined below are three popular methods in obtaining information from individuals and other organizations. To determine what information is needed, see Appendix B for sample questions and further detail on gathering information.

Interviews

Advantages

- one on one
- depth
- ability to probe/clarify insight into
 - ✓ corporate culture
 - ✓ politics within organization and community
 - ✓ assess readiness for change

Disadvantages

- limited number can be included
- time consuming
- summary/synthesis is subjective
- need to be able to “read between the lines”
- some people will be excluded

Surveys

Advantages

- more people can be included
- quantifiable - may be statistically valid
- anonymous
- establishes baseline for ongoing monitoring

Disadvantages

- can be costly
- developing a useful survey instrument requires expertise
- structure limits potential input

Focus Groups

Advantages

- more people can be included
- group dynamics can stimulate individual input

Disadvantages

- confidentiality cannot be promised
- requires specific facilitation skills
- individuals may be swayed by group dynamics

Each of the above methods has advantages and disadvantages therefore the group needs to determine the most appropriate methods for gathering information. The centre’s

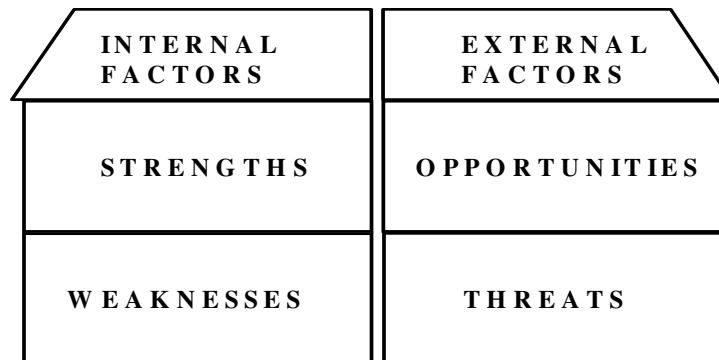
resources, time available for this step, amount of information to be gathered, and the expertise available should all be considered in making the decision.

5.2 Analyzing The Information

The “Where Are We Now?” step includes obtaining the information and analyzing it. Analyzing the data indicates how the internal and external factors are impacting, and may impact, the future of the organization and its ability to meet its mission and vision.

There are many ways of analyzing the information. One method frequently used in strategic planning is the strengths, weaknesses, opportunities and threats (SWOT) approach. This is a relatively straightforward method categories the data into four categories. There is nothing unique about these categories, only that they make it easier to identify the issues the centre is facing and provide assistance in determining the future.

SWOT DIAGRAM



5.3 Strengths and Weaknesses of The Organization

Internal Assessment

The organization must know its own strengths and weaknesses to determine how well it can cope with external pressures and changes. In this section, internal factors (e.g. those within the control of the organization) should be identified. Their positive (*strengths*) or negative (*weaknesses*) impact on the ability of the organization to fulfill its mission should be discussed and identified. Items in this category include (but are not limited to):

- Programs and services offered
 - scope of service
 - trends
 - utilization rates
- Present human resources available
 - skill and expertise
 - motivation and attitude toward change
- Resources - facilities, financial
- Organizational value and culture
- Organization effectiveness
- Communication and information systems
- Property and physical building structure

5.4 Opportunities and Threats Facing The Organization

External Assessment

The organization must be knowledgeable about its external environment and the opportunities (positive influences) and threats (negative influences) these pose to the organization. All organizations are affected by outside influences over which they have little or no control eg., the policy direction of national or provincial health and social services systems drives the options available to many social services centres or services move towards community based services rather than institutional. Provincial, regional or city initiatives may also impact an individual centre's role. These factors have varying degrees of positive or negative impact on the organization and its ability to fulfill its mission and vision.

In this section describe all these external factors and include the opportunities and threats each factor has on the organization. These factors include (but are not limited to):

- Centre's relationship with the community
 - Community's perceptions of the centre
 - Program trends - market share, gaps/barriers, demands
 - Societal/community influences
 - Quality and accountability
 - Client desires and rights
 - Multi-disciplinary approach
 - Emphasis on cost-effective care

- Demographic trends
- Health and social status indicators
- Government policy and funding directions (all levels of government)
- Other churches or social services providers and relevant agencies/bodies trends and initiatives
- Professional staff needs and trends
- The economy - fiscal constraints
- The labour market and environment
- Environmental issues
- THQ/DHQ policy (depending on the issue or policy, some may be listed as internal factors)

Hints For The Analysis Stage

In analyzing the data and information it is helpful to remember that the SWOT categories are not exclusive. Sometimes, items may be listed in more than one category. For example, you may identify human resources as both a strength and weakness.

Category	Strengths	Weaknesses
Human Resources	<ul style="list-style-type: none"> ▪ Strong leadership in some key positions on Boards/Senior Management ▪ Loyalty and committed leaders ▪ Tenure 15 years + 	<ul style="list-style-type: none"> ▪ Some leadership positions vacant ▪ No training or develop of future leaders ▪ Program imbalance between areas with strong leadership and weak leadership

Validating or confirming the accuracy of the information (especially descriptive) is important. Likely a number of people will be presenting information, thus validation should be done both with internal and external stakeholders. For example, suppose a corps does a questionnaire to the neighbourhood community and the results show service gaps in areas of family services, counselling and “good parenting” skills. Discussions with other similar service providers, provincial and regional government agencies, will validate or negate the survey’s findings (e.g. are there waiting lists for these types of service?)

Some problems are so difficult that they can't be solved in a million years unless someone thinks about them for five minutes

H. L. Mencken

5.5 Identifying Critical Issues

Having obtained and examined the information through the SWOT analysis, it is likely that some key or critical issues will be emerging. Identifying the critical issues can be helpful as a summary of the major finding of the SWOT analysis. It also begins to prepare the way for step three. The critical issues are those *most crucial* to the future of the centre. Their significance can be measured by the size of the gap between the current status of the organization's programs and services and what is needed to favorably respond to internal and external factors in the future in order to meet the organization's mission and vision. Identifying each critical issue, supporting information, underlying causes, potential conclusion(s) and potential option(s) will assist in the formation of the Strategic Plan.

A brief table may be prepared to describe each critical issue, At this point in the process, potential options do not have to be well defined or even reasonable. Often a brainstorming session is a good method of beginning to identify potential options.

Critical Issue Example

Issue:	Inadequate physical building structure
Supporting Information:	THQ property review 95.03; Fire Department Review 95.02
Cause:	Very old building, homestead, era 1900
Conclusion:	Limited life expectancy (under 3 years) for present programs in current building
Potential Options:	1. Renovate building 2. Change program 3. New building 4. Close program, sell property, new program

6. STEP THREE - WHERE SHOULD WE BE GOING?

Step three focuses the discussion on where the organization should be going. The critical issues facing the organization form the foundation for this stage.

6.1 Mission and Vision Re-visited

Most situations require defining the mission and vision before the development of the strategy, just as the strategy precedes long range planning and implementation efforts. The mission and vision are used as the guide for choosing strategic alternatives. This step starts by revisiting the mission and vision and comparing it to the SWOT analysis and the critical issues identified. What is the SWOT analysis showing to the centre about the organization's ability to meet its mission and vision?

You may discover that further revisions to the mission and vision are required because the SWOT and critical issues facing the organization are showing that the mission and/or vision are no longer relevant or realistic. The changes occurring in the internal and external environment may indicate organizational survival depends on organizational change. This may require a major shift in the mission and vision, minor revisions to the mission, or directional change in the vision. Canadian social service programming is undergoing a shift to community based service rather than residential. To survive, some centres have changed their direction and program focus to community based services. This is may resul in change of their mission and vision.

6.2 Strategic Alternatives and Priority Development

The identification of the key strategic directions to address the critical issues are described in this section.

Prayer for Direction and Help For Moving to Action

Dear Father, we thank you for your guidance and blessing in the past as we, your people have met to worship, to grow and to minister for you in this community. We praise you for the presence of your Spirit as we last met to consider the key questions in thinking about our future with you. Especially, we thank you for the spirit of unity we have developed in this work.

Again we ask you to guide our thinking as we chart new directions together with you. Be our compass. Map our future paths. Give us a clear sense of the direction we should be heading with you.

Through Christ Jesus our Lord, Amen

Given the critical issues articulated and the SWOT analysis, the next step is to identify what alternatives can be generated to solve the issues and utilize opportunities to meet the mission and vision. In formulating these alternatives, strategies need to be developed. The strategies should be workable, affordable, and acceptable to the key stakeholders as well as congruent with the mission and vision. The potential options developed in the critical issues identification step often become the main discussion points for determining strategic alternatives and priorities. Alternatives may also be identified through examining the strengths of the internal environment and the opportunities of the external environment. These are going to be the most likely areas for further development as you will want to build on the strengths of the centre to meet the opportunities in the external environment.

Each potential option should be examined and evaluated. Evaluation criteria should include things like congruency to mission and vision, community need, human resources requirements, impact on current members/clients, and financial implications. A sample format, "Criteria for Evaluating Preferred Options" is found in Appendix D. Some strategies will be more critical to the organization's success or survival than others. In prioritizing each alternative, the top priorities will become the driving force of the overall

future strategic directions and the ones to which the most time and resources will be allocated.

Strategic directions are not decided quickly. Further research or clarification is frequently required. Make sure time is taken to follow through on all reasonable options and do not make assumptions! For example, suppose the centre runs a child care program for children ages 3 - 5 years. In going through all the above steps, one option is to expand the program to include children ages 6 months to 3 years. Don't assume that the current license, regulations and staffing requirements will be the same. Make sure you check all requirements before making major decisions.

If we go back to the example provided in the critical issue stage, *beginning* to examine and evaluate each of the four potential options may look like this:

Potential Option	Initial Comments	Recommendations
1. Renovate Building	<ul style="list-style-type: none"> ▪ Estimated cost \$1 m. Building will still not meet current program standards 	<ul style="list-style-type: none"> ▪ Not recommended. No potential for growth - eliminate option
2. Change Program	<ul style="list-style-type: none"> ▪ Other program options available in areas of _____ ▪ Would require shifting mission and vision to different clientele ▪ Some renovations still required ▪ Unsure of skill and expertise of present staff to new programs 	<ul style="list-style-type: none"> ▪ Should not rule out yet ▪ Confirm what are the most viable program options ▪ Confirm what building renovations would be required ▪ Confirm human resources skills match
3. New Building	<ul style="list-style-type: none"> ▪ Would enhance centre's ability to meet mission and vision ▪ Programs presently provided have community support, need has been identified for more services in this area ▪ Would build on programs strengths and opportunities 	<ul style="list-style-type: none"> ▪ Further exploration needed re: new building - current site vs. new site ▪ Finances - e.g. possible support from community, government/funding agency ▪ Explore potential of other existing buildings
4. Close Program, sell property, new program	<ul style="list-style-type: none"> ▪ See comments under number 2 	<ul style="list-style-type: none"> ▪ Keep option open - may depend on results of number 2 and 3 above

If choices are not made among identifiable alternatives, we must live with ambiguity and can rationalize ourselves into hopelessness.

- David Secunda

6.3 Strategic Goals

The key alternatives are the basis for future direction of the organization and can be simply stated as the goals of the organization. These goals should be broad and help to move the organization closer to accomplishing its mission and vision. They provide a framework for the development of objectives and the implementation/action plan

6.4 Objectives

From the goals developed, individual objectives should be established. The objectives should be *specific, measurable and achievable* within a given time frame and consistent with the mission and vision of the centre. They form the basis of step four.

Goals are statements of strategic direction that reflect the intent of the organizations.

Objectives are concrete, specific action statement through which goals are achieved. A goal may be “To develop a comprehensive Christian Education program”. To achieve this goal there may be many objectives such as:

- ✓ *“Training and developing four additional Sunday school teachers by September 199x”;*
- ✓ *“Develop an ongoing training and education program for all Christian Education teachers by June 199x”;*
- ✓ *“Institute a bi-annual forum for Sunday school teachers, junior soldier teacher, senior soldier teacher, and corps cadet counsellor by November 199x”.*

7. STEP FOUR - HOW DO WE GET THERE?

Step four, is the implementation stage. This is the time to plan and implement.

7.1 Business Plan - Action Plan

A detailed business or action plan is essential for successful implementation and evaluation of the strategic plan. This should include the necessary activities, programs and resources required to meet the key strategic directions, goals and objectives that have been developed. The development of the business plan should include an examination of the structure and operation of the organization and include an outline of the tasks required for implementation to ensure a fit with the newly stated strategy. The business plan should result in a blueprint of concrete activities or programs including responsibility, resource allocation, time frame etc.

Areas requiring examination include:

Estimate the costs for implementation: These should include

- required capital
- start-up costs
- program costs
- human resources

Review and allocation of resources:

- a) *Financial:* Are there adequate resources available to meet the estimated costs for implementation the key strategic areas? What are some of the alternatives for freeing up existing resources or obtaining additional ones?
- b) *Human Resources:* Is staff re-training required? What additional staff is required?
- c) *Physical (building/equipment):* Is there space available? Are renovations or a retrofit required? What new equipment will be required?

Organizational structure: Does the present organizational structure fit the strategic thrusts? Are jobs/positions adequately defined to permit the strategies to move ahead? Are committees in existence to deal with the plan?

Allocation of Tasks: Are there people (individuals or committees) identified as responsible for each objective?

Estimated time frame - develop a time chart: A realistic time frame should be developed which includes consideration of internal and external factors. Developing a critical time line showing what tasks can be accomplished simultaneously and what tasks are dependent on other tasks can be very valuable.

EXAMPLE OF A CRITICAL TIME LINE

	J	F	M	A	M	J	Jl
Activity A							
Activity B							
Activity C							
Activity D							

Develop Communication and Information Systems: What communication and information systems are needed both internally and externally (e.g. Community/Public Relations) for the Strategic Plan. Decide who reports to whom and how it is done.

Include critical implementation issues: There may be other critical issues unique to the situation (e.g. external factors - government policy directions or legislative changes).

7.2 Budgeting Process

Implementation of the plan depends on the budgeting process which needs to carefully lay out the financial implications including annual budget requirements. The annual budget must be a reflection of the preferred future direction of the organization. The budget and subsequent monthly financial statements then become part of the quantifiable method of evaluating the plan.

A three year financial plan may be developed outlining a year by year forecast of revenues and expenditures (including capital, start-up, and operating costs). In today's current economic climate a realistic three year financial plan may seem difficult to develop, but if the plan

- ✓ is realistic
- ✓ incorporates effects of known actions
- ✓ is conservative
- ✓ performs “what if” analysis on major assumptions

then it should be helpful

- ✓ in confirming that the strategic direction(s) chosen are realistic;
- ✓ in identifying areas of concern; and
- ✓ as part of the ongoing evaluation process, (including revisions to the financial plan as time goes on and more information is obtained).

8. STEP FIVE - HOW ARE WE DOING?

8.1 Evaluation Process

Strategic planning is a process whereby an organization determines its best course of action in line with its mission and vision. Step five helps to determine how the organization is doing in meeting its mission and vision. As strategic planning is an ongoing process, evaluation needs to be considered from two angles. First, evaluate the process of planning, then evaluate the plan.

Evaluating The Process

While the model developed in this booklet shows evaluation as the last step, evaluating the process is something that should be done on an ongoing basis through each planning step. In many respects as a centre moves from one step to the next, they are probably evaluating the process. The results or outcomes from one step should impact what happens in the next step. One question to frequently ask through the process is “*Has the process remained flexible enough so that unexpected changes have been factored in and the planning process adjusted accordingly?*” If through the planning process, targets have been established, measuring whether these targets have been met will also help in the evaluation process.

Part of the ongoing evaluation process should be to monitor that all stakeholders are kept informed of the planning process. Are the communication systems effective?

Evaluating The Plan

As the actual plan takes shape and the centre begins to implement new directions, it is also important to determine the effectiveness of the strategic plan in enhancing the ability of the centre to meet its mission and vision. While mission and vision will be one of the key criteria in evaluating the plan, other criteria should also be developed. These should:

- ✓ relate to the initial questions (e.g., why did we choose to go through a strategic planning process);
- ✓ be based on the criteria established for the preferred strategic directions;
- ✓ measure the outcomes the organization wanted to achieve; and
- ✓ measure the degree to which goals and objectives have been met

It may be helpful for the planning committee to use a monitoring tool for both the evaluation of the process and the plan. A simple tool may include categories such as

1. Overall goal/key alternative
2. Specific projects/actions
3. Responsibility
4. Start date
5. Estimated completion date
6. Current status

See Appendix E for the above developed into a table

Using a system for evaluating the process and plan also helps with the ongoing nature of strategic planning. Remember, strategic planning is not just a written plan the centre ends up with at the end of the day -- strategic planning is a ***process*** that encourages organizations to act, make decisions and provide programs and services based on mission and vision. It helps organizations to move from crisis management mode to mission and vision driven management.

*Success doesn't come from the way you think it does
It comes from the way you think.*

Robert Schuller

9. CONCLUSION

*"Determination to be wise is the first step towards becoming wise!
And with your wisdom, develop common sense and good judgment"*

Proverbs 4:7 LB

9.1 Do's and Don'ts of Strategic Planning

In summary, here are some key things to remember when undertaking a strategic planning process:

DO

- ✓ Allocate sufficient time and resources to develop plan
- ✓ Include representative of major stakeholders in the planning process
- ✓ Integrate planning with all departments/sections
- ✓ Collect and analyze data at an appropriate level of detail - determine what information is needed and what is not needed early on in the process
- ✓ Update, revise, and refine the plan and the database on which it is built on an ongoing basis
- ✓ Keep an open mind and be prepared to face reality
- ✓ Be challenged!

DON'T

- ✓ Hurry
- ✓ Plan in a vacuum
- ✓ Succumb to "analysis paralysis" - let the information and analysis section paralyze you from continuing on to the next step
- ✓ Begin to implement the plan before finishing the planning process
- ✓ Use planning to validate your biases
- ✓ Take the path of least resistance
- ✓ Expect everyone to accept the plan immediately
- ✓ Congratulate yourself and put "The Plan" on the shelf

9.2 The Future

Christian organizations planning strategically must be *mission and vision driven*. The apostle Paul reminds us that, while we are “not of this world”, we still live in the world. If we want to be proclaimers of the gospel to our communities then we need to know what our unique role (*our mission*) is in proclaiming the gospel. We also need to know who we are and what we have to offer (*our strengths and weaknesses*) to meet the needs of the community (*the opportunities and threats*) in order to achieve our mission of sharing Christ.

May God guide us and grant us wisdom, strength and patience on the journey. God Bless!

*For I know the plans I have for you...plans to prosper you
and not to harm you, plans to give you hope and a future.”*

Jeremiah 29:11

APPENDIX A

STRATEGIC PLANNING GLOSSARY OF TERMS AND DEFINITIONS

Mission Statement:	A mission statement outlines the fundamental purpose and scope of an organization, its programs and services and the principles upon which service is based.
Vision Statement:	A vision statement articulates direction and choice, uniqueness of purpose and differentiation from other organizations. It takes a long perspective, serving as the foundation for the hard, specific and measurable target of short and medium term objectives. A vision statement puts “feet” on the mission statement.
Value Statement:	The value statement represent a set of fundamental beliefs accepted and lived throughout the organizations. Collectively they help to create the organization’s culture. The values define preferred behaviour, provide a standard for responses to problems, and establish the norms for decision-making and working together
Strategic Direction:	Strategic directions are the major areas of development required by an organization in order for it to successfully achieve its mission and purpose.
Goals:	Goals are statements of general direction that reflect the intent or strategic direction of the organization. They are long ranged and have a broad focus towards a particular end or result.
Objectives:	Objectives are concrete, specific action statements through which goals are achieved. Objectives are measurable, feasible, specific and have target dates for completion.

- Business/Action Plan:** The business or action plan outlines how each objective will be achieved. It should include the methodology or process, the person or persons responsible, and the time frame for achieving each objective.
- Program Plan:** A description of the current and projected scope of services, workload and utilization objectives, future directions and resource implications.
- Human Resources Plan:** A description of the implications of the organization's future direction for staff recruitment and replacement.
- Stakeholders:** Any group or individual who is involved with, affected by, or contributes to the organization.
- Community:** A group of individuals who are bound together by something they have in common. The common factor may be single or multiple for any community. Examples of factors include:
- common belief - e.g., Salvation Army corps congregation
 - common purpose - e.g., seeking or providing a similar service
 - common characteristics - e.g., geographic - town; demographics - age cohort; ethnic/cultural background

APPENDIX B

INFORMATION AND DATA GATHERING QUESTIONS TO BE ASKED

The following is a list of questions that may be helpful to the group in clarifying the type and amount of information to be gathered. They are guidelines only and should lead to other questions for the group.

METHODOLOGY -- SURVEY, INTERVIEW OR FOCUS GROUPS?

1. Why are you conducting the survey, interview, or focus group (to solicit support, to gather information, to promote the project)?
2. What information are you looking for (about the community, about a community problem/issue, about a target group)?
3. Who do you need to gather information from? (Service providers, people directly affected by the problem, politicians).
4. What do you want to know? Prepare as many questions in advance as possible.
5. Are you looking for factual material, observations or opinions (statistics on reported cases, observations related to a person's work, perspectives on the cause of a particular problem)?
6. How will you conduct the survey/interview/focus group? (In person, by telephone, in a group meeting).

DECIDING ON STAKEHOLDERS

1. Who is affected by the issue/problem in your community - directly, indirectly? (Parents, young people, service provider, etc.).
2. What other people are interested in the nature or extent of services and programs (religious groups, women's organizations, sister agencies, professional organizations, neighbours)?
3. How do these different groups view the problem? Do they consider related issues? Are they concerned with the causes? How do they view the solutions?

4. Are there similarities or differences among the various groups (for instance between service providers and clients, between parents and young people)?
5. What factors account for these differences/similarities (age, class, education, ethnic background)?
6. Are there common interests or themes that can be identified to help these groups work together (a need for more education, prevention program, better services)?
7. Who has indicated support and willingness to work (make a list of contacts with name and addresses)?

Four characteristics that organizations should consider in helping to select people to bring together to work on a project (applies to both internal and external stakeholders):

1. A shared vision of what is needed in the community.
2. Knowledge about the issues and the services.
3. An ability to work cooperatively.
4. Time and energy.

PROGRAMS AND SERVICES

Questions that need to be asked during step two - "Where are we now?"

1. What organizations or agencies provide services/programs in your community (e.g., major church's, social services, or health agencies)?
2. What specific services or programs are provided by these institutions or organizations (outlined by agency, the type of service, general objectives, target group, location)?
3. How adequate are the various programs? Are they meeting their objectives? Are they accessible to target group? (Consider location, hours of operation, etc.). What type of resources are available? (Size of caseload, number of staff, resources for training).
4. Do existing programs/services meet the needs of the community? Are they addressing problems or symptoms?
5. What are some of the services gaps or needs? What evidence do you have?
6. What changes do people want to see in the community?

7. What factors favour change in the community (level of public concern, willingness of individuals to participate)?

HOW ARE YOU GOING TO HANDLE OPPOSITION?

*Some questions to consider if you think there may be opposition to new strategic directions -- think of both **internal** (e.g., staff, union) and **external** stakeholders!. Answering these questions may assist the group in determining how to handle opposition and turn it into opportunity.*

1. What groups, organizations or individuals might oppose the development of services or programs concerned with controversial issues?
2. What is the nature or extent of their opposition? What do they oppose? Do they have a formal position? Why are they opposed? (If the group is a member or other provincial or national groups, try to get copies of their newsletters or other publications).
3. How large is their membership (local, provincial)? How active is their membership (locally, provincial)? What other activities or programs are they involved in?
4. If opposition is part of the group's formal policy, to what extent do individual members adhere to the same position? Is agreement on the issue a condition of membership?
5. Who are the leaders of the group (locally, provincially, nationally)? Do these people have the support of the membership on the issue? How many of the leaders are supportive of the group's position?
6. What is the group's visibility and degree of commitment? (Public visibility through the media for example can often outweigh actual numbers if the group is determined to exert public pressure).
7. What tactics have they used in the past? How do they operate? Do they write letters to newspaper editors, hold public demonstrations, lobby board members, politicians, ad agencies?
8. Are there people from the organization or community who could play a role in managing or diverting public controversy? Would these people be able to lend credibility to the organization or influence the opposition?
9. What other factors could work against change in the community (resistance to change from major agencies or particular administrations)?

TELLING YOUR STORY

New directions require good publicity - Don't be afraid to let the world know what you're doing!

1. Why do you want publicity?
2. What do you want to achieve? (Attract people to an event, introduce your group to the community, do public education on an issue).
3. What message(s) do you want to deliver?
4. What type of coverage do you want (news cover, feature story, public announcement)?
5. At what point in your project do you want coverage?
6. Does the project stand to lose from certain types of publicity?
7. How are decisions made about what kind of material gets covered? Who makes the decision? What kinds of news items are they looking for? What are the deadlines and other expectations regarding submitted material?
8. Are there particular reporters, newscasters or talk show hosts to avoid? Why? Would avoiding them hurt or help your chances to get coverage? If you had to deal with a strongly opinionated talk show host who opposes your group's view, is there more to gain or lose by not approaching that person?

Some hints about working with the media:

1. Get your local Salvation Army Public Relations Officer involved!
2. Decide how you want to be presented by the media -
 - a. Do you want to present a news story, a public interest story or simply a public announcement?
 - b. Think about the story angle before you release the material to the media. What would capture the media's attention, and the interest of the general public?
3. Don't try to sell a public announcement as a major news story unless you have a special angle to catch public or media interest. A monthly group meeting may not be

Strategic Planning Model

news, but a striking or bold comment from a prominent person is. A conference where such a person is speaking thus becomes attractive to the media.

4. Never act as if the media owes you a story. Sell your story on its own merit. Point out why the story will be of interest to the readers, listeners, or watchers.
5. Use proper format. Make sure your copy is letter perfect, typewritten and easily read.
6. Keep a clipping file of all the coverage your group receives.

APPENDIX C

STRATEGIC PLANNING PLAN SUGGESTED TABLE OF CONTENTS

MISSION and VISION Statements
EXECUTIVE SUMMARY

1. INTRODUCTION

- 1.1 Brief History of Corps/Centre
- 1.2 Strategic Planning Process

2. STRATEGIC ANALYSIS

- 2.1 Assessment Model - SWOT Analysis
- 2.2 Strengths and Weaknesses - Internal Environment
- 2.3 Opportunities and Threats - External Environment
- 2.4 Critical Issues

3. STRATEGY FORMATION

- 3.1 Vision and Mission Re-Visited
- 3.2 Proposed Strategic Alternatives
- 3.3 Priority Development
- 3.4 Goals and Objectives

4. IMPLEMENTATION

- 4.1 Business Plan

5. EVALUATION

- 5.1 Evaluation Process
- 5.2 Accountability

6. APPENDICES

7. REFERENCES

APPENDIX D

CRITERIA FOR EVALUATING PREFERRED OPTIONS

The following are given as **sample** evaluation criteria that may be used in determining new programs or re-development of buildings. Criteria should be **modified, added, or deleted to match the organization's direction**. Consideration may also be given to weighting each criterion based on a ranking of importance.

Ranking = 1 point low - 5 points high

Criteria	Option 1	2	3	4
Congruency to SA mission				
Congruency to centre mission/vision				
Identified community need				
Acceptability to community at large				
Impact on existing programs and clients				
"Fit" with current human resources				
Overall financial viability				
Capital Costs				
Operating Costs				
Long term durability - business sense				
Time for implementation				
Perceived "risk" in community				
TOTAL POINTS				

APPENDIX E

ONGOING EVALUATION TOOL



THE SALVATION ARMY - _____ CORPS/CENTRE

1996.00.00

STRATEGIC PLAN - EVALUATION AND UPDATE

GOAL/OBJECTIVE	PROJECT/ACTIONS	RESPONSIBILITY	START DATE	EST. COMP. DATE	CURRENT STATUS

APPENDIX F

PLANNING COMMITTEE SUGGESTED MEETING AGENDA OUTLINES

The following are *suggested* meeting outlines and the tasks that would be accomplished in each meeting. Modification is required to meet local circumstances and time frame.

MEETING #1

- Introduction of meeting attendees
- Development of Objectives for planning process
- Development of Timetable - Work Schedule for planning process
- Set tentative dates for Planning Committee Meetings
- Overview of ministry and/or social services trends
- Review of Mission and Vision statements
- Discussion about Stakeholders to be involved
- Planning for Educational Sessions
- First assignment of tasks
- Next Steps, Date of Next Meeting

MEETING #2

- Review of progress to date
- Summary of last planning committee meeting
- Up-date on Mission and Vision statements
- Presentation of the organizational and community assessment to date
 - summary of perceptions
 - summary of internal assessment
 - summary of community assessment
- Discussion of findings
- Next steps, next tasks, date of next meeting

MEETING #3

- Review of progress to date
- Summary of last planning committee meeting
- Up-Date on organizational and community assessment
 - any new or clarified information
- Identification of critical issues facing the organization over the next 3 - 5 years
- Next steps, next tasks, date of next meeting

MEETING #4

- Review of progress to date
- Summary of last planning committee meeting
- Confirm Critical Issues
- Identify strategic alternatives
- Set evaluation criteria
- Next steps, next tasks, date of next meeting

MEETING #5

- Review of progress to date
- Summary of last planning committee meeting
- Results of application of evaluation criteria
- Agreement on strategies to be pursued and development of recommendations to the appropriate body
- Assigning/confirming development of action/implementation plan
- Next steps, date of next meeting

MEETING #6

- Summary of progress to date
- Summary of last planning committee meeting
- Presentation of Action Plan
- Presentation of Financial Plan
- Draft of the Report of the Planning Committee to the appropriate body for approval

*Never try to solve all of the problems at once
- make them line up one-by-one.*

Richard Sloma

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- * Items indicated with an asterick are good resources for futher information on strategic planning.