

# Activity

## Creating your strategic plan

Use the steps below in concert with the example strategic plan from the Cherry Street Centre and the Strategic Plan Template to create your final strategic plan.

### Step 1. Mission/Vision Statement

You may well already have a mission statement for your organization. That's great! Just write that mission statement in the first column. If not, then take a look at our resources on how to create a mission statement. Once you have determined what your mission is, it's time to work out what your goals, or objectives are.

Write down your mission statement in the relevant column in the Strategic Plan Template on the activities page.

### Step 2. Determine Your Goals

In this context, your goals are not exactly the same as your mission. Often people get mixed up between goals and mission. Or tasks and goals. Goals are **specific** aims that relate to your mission.

Goals are accomplished in order to realize the vision communicated in your mission statement.

#### **YWCA Canada's Mission**

Advance gender equity for all women through informed advocacy and strong Member Associations.

This is a general mission statement. It doesn't have specific goals to achieve that mission.

***YWCA Canada's informed advocacy aims to:***

- *End violence against women and girls*
- *Implement national child care*
- *Achieve economic equality*
- *End homelessness for women and girls*

These goals tell us what the YWCA thinks will achieve their mission statement.

Try to make your goals as SMART as possible (Specific, Measurable, Achievable, Relevant, and Time-Bound).

Remember that your goals shouldn't just be SMART, they also need to be reasonable and achievable *within the constraints faced by your organization*. You might want to achieve world peace - it could be part of your mission, but it's unlikely that you'll do it - certainly not within a 5 year time-span! Pick goals that you can actually achieve that are related back to your mission.

Once you have some ideas around goals, start working out what the main 3-5 goals are and put them into the Strategic Plan Template.

### **Step 3: Decide on your tasks**

Look at your goals, how are you going to achieve them? Tasks are actions that are even more specific than the goals. This isn't just **what** you are going to tackle to achieve your mission, it's exactly **how** you are going to tackle it. Be SMART with your tasks too (Specific, Measurable, Achievable, Relevant, and Time-Bound.)

Remember, your tasks need to be reasonable. Don't choose to try to accomplish tasks that you do not have the capacity to achieve. Taking on a task that can't be achieved with the resources your organization has (skills, money or other resources) is a recipe for failure.

Think about timeframes. How soon can each of these tasks start? When will

they finish? Strategic plans usually have a 3-5 year outlook and divide tasks into short-term, medium term and long term. These depend somewhat on your organization and how long you can plan for, but in most cases short term is 6 months-1 year, medium term is within 3 years and long-term is within 5 years.

Fill in your tasks, long, short & medium into the columns in the Strategic Plan Template. Keep these short and point-form (you can always edit for grammar and flow later). You can have a few for each goal, but keep them achievable.

This isn't a plan for each task. This is a broad overview of your plan for the next 5 years. If you feel you want to add more detail, add an extra page with more information about the tasks, but keep the main Strategic Plan to 1 page.

## **Step 4. Measuring Success (or failure)**

The next part is to identify ways to measure the success or failure of each goal. You may want to have several measurements at different points in time. Remember your tasks and goals should have been SMART, so how will you measure them? Sometimes your goals will be difficult to measure. You may have to create surveys to get feedback or do tests to see if you've met your goals.

The measurements here should be for your future board of directors who will be revisiting the strategic plan in the future. They will have to determine how successful this plan has been and if the organization should change its strategies or should continue with the same goals and tasks.

Again, when you choose a way to measure success, make sure that you can actually capture the information you need for the measurement. It's no help to suggest that you do in-depth qualitative interviews with 100 beneficiaries if you don't have the time or money to make that a part of your plan.

### **Set yourself up for success**

A strategic plan isn't just a wish list of all the things you'd like to do, it's a plan that can inspire the people in your organization to work towards shared goals, but if you can't achieve those goals, it will result in discouragement and disappointment. So set yourself up for success and ensure that your strategic plan is a SMART plan.

## **Step 5. Revisit Your Plan**

Your strategic plan is a living document - not something that you do once every 5 years. It's something that should be revisited once a year so that if circumstances change or your organization changes, you can respond and continue on with working towards your vision and successfully carrying out your mission.