



## Strategic Planning Guide

Strategic plan development involves several steps: creating mission and vision statements, conducting assessment and SWOT analysis, setting goals, defining key performance indicators (KPIs), formulating action plans, and ensuring sustainability. This process establishes a framework to align organizational direction with the goals intended to achieve the vision set by leadership and stakeholders. (Kennedy, 2020)

Get an overview of the strategic management process: [What Is Strategic Planning? How to Develop a Process \[Video\]](#)

### **Step 1. Creation of Mission and Vision Statements**

**Mission statements** communicate the purpose of an organization's work. They demonstrate what the organization does and why it does its work. They should be brief yet impactful, communicating the purpose of the organization's existence and providing a fundamental purpose for the work performed. (Kennedy, 2020)

- Resources for writing a mission statement:
  - [How to Write an Effective Mission Statement in 3 Steps](#)
  - [15 Mission Statement Examples for Your Business](#)

**Vision statements** convey the organization's future focus and serve as a compass for guiding its direction toward the organization's goals. (Kennedy, 2020)

- Resources for writing a vision statement:
  - [Vision Statement Template with 40 Vision Statement Examples](#)
  - [A Guide to Writing a Great Vision Statement \(with Examples\)](#)
- Additional resources for writing mission and vision statements:
  - [How to Write a Mission Statement](#)
  - [What Is a Mission Statement?](#)
  - [What Is a Vision Statement?](#)
  - [Your Mission, Vision, and Values](#)



## Step 2. Assessment and SWOT Analysis

Assessment involves conducting needs assessments with staff and stakeholders to gather information on what is working well and what needs to change.

- Learn more about needs assessments:
  - [Seven Steps for Conducting a Successful Needs Assessment](#)
  - [How to Build an Organizational Development Plan: A Comprehensive Guide](#)
  - [Conducting Needs Assessment Surveys](#)

Conducting a SWOT analysis is also an important part of the assessment process to determine your organization's strengths, weaknesses, opportunities, and threats.

- Resources for conducting a SWOT analysis:
  - [SWOT Analysis: What It Is and How to Do It \[Examples + Template\]](#)
  - [SWOT Analysis: A Theoretical Review \[Abstract\]](#)
- Videos about assessments and SWOT analysis:
  - [Needs Assessment Process](#)
  - [How to Perform a SWOT Analysis](#)
  - [How to Use SWOT Analysis](#)
  - [PWI/EPOC SWOT Strategic Planning Foundational Track](#)
    - [PWI/EPOC SWOT Strategic Planning Foundational Track \[PDF\]](#)
  - [PWI/EPOC SWOT Strategic Planning Advanced Track](#)
    - [PWI/EPOC SWOT Strategic Planning Advanced Track \[PDF\]](#)

## Step 3. Goal-Setting

After completing the assessment phase of the planning process, the next step is to develop goals that provide a framework for meeting your established vision. These should be in a SMART format.



- Resources for goal-setting:
  - [How to Build an Organization Development Plan: A Comprehensive Guide](#)
  - [How to Set Strategic Goals \(with 73 Examples You Can Steal\)](#)
  - [What Are Strategic Objectives? | Strategic Objectives Defined](#)
  - [BHRR SMART Goals Webinar \[Video\]](#)
    - [SMART Goals and Strategy Breakdown Webinar \[PDF\]](#)

#### **Step 4. Key Performance Indicators**

To secure a competitive and successful strategic plan, the effectiveness of the implemented strategies should be measured. KPIs are typically written in a SMART goal format and will assist leadership in determining if the organization was successful in reaching its goals.

The following are some items to consider when creating KPIs:

- Determine benchmarks or baseline indicators that your organization would like to collect.
- Examine the data your organization already collects. Assess and address any gaps in the collected data.
- Decide on the frequency of KPIs and delegate data collection tasks.
- Resources for developing KPIs and establishing baselines and benchmarks:
  - [Behavioral Health Recruitment & Retention Establishing Benchmarks Fact Sheet](#)
  - [How to Develop Key Performance Indicators \[Video\]](#)
  - [BHRR Webinar: Baselines and Benchmarks \[Video\]](#)
    - [BHRR Baselines and Benchmarks Webinar \[PDF\]](#)

#### **Step 5. Establish Action Plans**

The next step in the process is to gather all the information collected in the previous steps to create an action plan outlining how the work will be accomplished. Action plans



should include the strategies selected by the organization to achieve its goals, ultimately leading to the realization of its vision.

- Resources for developing an action plan:
  - [How to Build an Organizational Development Plan: A Comprehensive Guide \(+Template\)](#)
  - [Why and How to Build a Strategic Action Plan](#)
  - [Developing an Action Plan](#)
  - [How-to Guide: 3 Steps in Developing an Action Plan \[Video\]](#)
  - [MIP Sustainability and Action Planning Webinar \[Video\]](#)
  - [Don't Leave Your Change to Chance: Sustaining Your Gains MIP Webinar \[PDF\]](#)

## **Step6. Create a Sustainability Plan**

To continue your organization's important work, it is crucial to complete this process by creating a sustainability plan. This process starts with the completion of the PSAT.

- [PSAT Tool](#)

Based on your results from the PSAT tool your organization completed as part of your deliverables, a sustainability action plan can be created. BHRR organizations have already completed this step when they completed their sustainability plan.

Resources and templates for creating sustainability plans:

- [Program Sustainability Action Plan](#)
- [Program Sustainability Action Planning Pre-Work](#)
- [Sample Sustainability Action Plans](#)
- [Examples of Domain-Specific Actions for Sustainability Planning](#)
- [Preserving Progress: Assessing and Planning for Program Sustainability](#)
- [BHRR Learning Collaborative: Sustainability \[Video\]](#)
  - [BHRR Learning Collaborative: Planning for Sustainability \[PDF\]](#)



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