**Step 1: Review the Mission**

* Who are we?
* What are the basic social or political issues we exist to meet or what are the basic social or political problems we exist to address? i.e what is the social justification for our existence?
* What do we do to recognise, anticipate and respond to those needs and problems? How do we find out about them and decide what to do?
* Who are the key stakeholder? How do we find out what they want from our organisation?
* What is out philosophy, our values and our culture?
* What makes us unique or distinctive?

**Step 2: Identify Mandates/Restrictions**

* Formal – funders and constitution
* Informal – unspoken mandates

*Compare to Mission and identify gaps*

**Step 3: Review the Past few years**

* Identify highs and lows
* Opportunities – and how we have responded to them
* Threats and how they were handled
* Strengths – relied on, ignored
* Weaknesses – how dealt with

**Step 4: Look to the future**

* Ideas
* Wish list
* Existing programmes and activities
* Staff, Board members
* Finances

**Step 5: SWOT**

* Examine the organisation, external environment, future environment
* Brainstorm?
* Rank
* Importance
* Strengths
* Weaknesses
* Opportunities
* Threats

**Step 6: Planning – Themes**

* List Ideas – rank
* Compare to Mission
* Consider consistency
* Anything missing? Too much?

**Step 7: Steps and Timeframe**

* Priorities met
* Realistic
* Measurable
* Consider impact of weaknesses/obstacles
* Resources

**Step 8: Draft the Plan**

* Background
* Vision
* Mission
* Core Values
* Mandates and Stakeholders
* Communication Plan/Marketing Plan
* SWOT Analysis
* Risk Assessment – list risks , controls in place, responsibilities
* Strategic issues, goals, objectives, obstacles – by year/quarter/month SMART i.e. Specific, Measurable, Achievable, Realistic, Timebound
* People Development plan(s)
* Financial Implications/Budget including Funding Plan
* Measuring Success/Benchmarks
* Resources needed
* Time line

**Step 9: Review**

* Mission and plan

**Step 10: Adopt the Plan**

**Step 11: Implement the Plan**

**Check Progress**

Agenda item at Board Meetings every three months?