

SIMPLE PLANNING PROCESS

- 1.** Identify issues and goals by addressing questions such as:
 - a) What type of issues and/or goals could have a positive or negative effect on the agency?
 - b) What could be the effects of these issues and/or goals in terms of threats or opportunities?
 - c) What changes must we make to address the threats?
 - d) What strengths can we build on to take advantage of the opportunities?
- 2.** Determine whether each issue/goal is “important” or “urgent.” Often, issues seem very important when they're only urgent, for example, changing a flat tire is an urgent issue -- but you'd never put "changing a tire" in a plan for your business. Attend only to the important issues and not the urgent issues.
- 3.** Prioritize the top three to five issues and goals.
 - Issues and goals usually come from...
 - o strengths to be built on
 - o weaknesses to be strengthened
 - o opportunities to be taken
 - o threats to be avoided
 - Many issues are based on gut feeling or intuition, rather than on sufficient external and internal assessments.
 - Issues that are too narrow do not warrant planning and issues that are too broad will bog you down.
 - Deal with issues that you can do something about.
- 4.** Issues and goals should be clearly articulated so that another outside of the organization can understand the description.
- 5.** It helps to temper ideas, i.e., verify them against reality by having someone in the group assigned to be the “devil’s advocate.” Their role is to ask straightforward questions in an effort to get group members to adequately examine the current suggestion or idea before accepting it.

6. Be careful not to ignore current major issues in the interest of pursuing more creative and forward-looking goals. Many organizations have faltered because their planning focused too far down the road and they ended up falling over their feet.
7. Reword issues to goals. Note that goals should be worded such that, when they are reached, they will have addressed an issue. Ensure that all everyone understands the goals and that the goals, when reached, will address each issue.
8. Get organized: assess whether you are ready -- Put together a plan for your process
9. Get the commitment of everyone involved
10. Determine who will oversee the effort
11. Develop the plan: based on specific goals, objectives and strategies -- This step allows you to move from intentions to specific ways you can achieve your objectives and identify resources needed to advance your efforts.
13. Measure your results.
14. Make changes to the plan as necessary.

Additional information on this and other planning topics can be located through the RESOURCES section on the main menu.

