



City of Wilmington

Mayor's Office of Neighborhood Development

Strategic Plan Development for Neighborhood Associations

Strategic Planning Workbook

Strategic Plan Development for Civic and Neighborhood Associations

Information Gathering – The Why

Boundaries: Our ideas about the boundaries of our neighborhoods are fluid and vary from person to person or from circumstance to circumstance. For the purposes of developing a strategic plan, however, it is important to identify and agree upon designated boundaries.

Tip: Start with a map. Draw the boundaries on the map. Physical features, roads and rail-lines make great boundaries.

Strengths, Weaknesses, Opportunities and Threats (S.W.O.T): It is important to take stock of the neighborhood. A SWOT analysis is a powerful way to break down and lay out the elements of the neighborhood that need to be considered to make an informed plan.

Strengths and Weaknesses are internal characteristics of the neighborhood. What is going on inside the neighborhood? How is it strong and what can be improved?

Opportunities and Threats are external. What things are not inside of the neighborhood but do or will influence it. What opportunities can the neighborhood benefit from by taking advantage of them? What forces threaten the wellbeing of the neighborhood?

Tip: Strengths and Weaknesses are something the organization can conceivably have some control or influence over. Opportunities and threats are outside the control of the organization.

Note: This is one of the ways a diverse range of opinions and experiences will be extremely useful. No one person has all the facts.

Assets: What tangible and intangible assets do residents of the neighborhood or the organization have access to? Assets can be physical (buildings and parks), institutional and organizational (churches, schools and associations), informational (libraries and vocal citizenry), or skill-sets (carpentry, youth-outreach or grant-writing). Think outside the box, anything or anyone can be an asset!

Congratulations: You are an asset to your neighborhood!

Tip: When you identify assets, determine whether you have immediate access to them or if they need to be sought out.

Plan Development – The What

Vision: If this organization is successful, what will the neighborhood look like in the long term? Think 10+ years. What will the place look like physically? Who will live here? How will people behave? What are the ideal attributes of this neighborhood?

Tip: Think about this a while. Consensus among the group is a must. Start with the key components of the vision, list them as bullet points. Once they are agreed upon, convert them to a narrative.

Mission: Why does this organization exist? What is its purpose and whom is it intended to benefit? There can be some brief mention of strategy, but the mission statement should tell anyone who reads it what the value of this organization is.

Tip: Consensus is necessary here as well. Again, start with key components. Why does the organization exist? Who are the stakeholders? How will this organization leave the stakeholders better off? What value does the organization bring to the neighborhood?

Goals: What must be accomplished to fulfill the mission of the organization? Think more specifically than the mission. They should directly address what will be different if the mission of the organization is achieved.

Tip: Think about what needs to change. Think about the specific ways the neighborhood will be improved as a result of this organization's activities.

Objectives: How will the organization achieve its goals? Objectives should be Specific, Measurable, Achievable, Realistic and Time-bound (SMART). Objectives are more specific than goals. Objectives should be outcomes. Achieving objectives leads to fulfilling goals. Some objectives can fulfill more than one goal, but all must relate to at least one goal.

Tip: Think about SMART when developing objectives. If an objective fulfills more than one goal, account for it.

Warning: Some groups set objectives that are unachievable and lose steam when they fail to achieve them. Other groups aim too low and achieve the objective easily, but with little impact.

Implementation – The How

Action Steps: What steps will be taken to accomplish the objectives? Specifically: who will do what; how will they do it; by when; and what tools do they need?

Tip: Committees are great “Who’s” but be sure each one has a designated leader who will be accountable for following through. This is where many strategic plans break down. The group may want to discuss what happens if action steps are not followed through to completion.

Tip: Think about the resources needed to carry out an action step. Does the organization need help from outside? Are there assets within the community that can be mobilized? Does an action step require an outlay of money?

Evaluation: Check in regularly. Keep track of the measurement criteria. Are the objectives on their way to achievement? If so, great! Keep up the good work! If not, what changes need to be made?

Tip: Many groups do this by having each committee report on its activities at monthly meetings. When an objective is achieved, revisit the strategic plan and think about what happens next.

WORKING PACKET

Information Gathering – The Why

Information Gathering Step 1: Boundaries

Our ideas about the boundaries of our neighborhoods are fluid and vary from person to person or from circumstance to circumstance. For the purposes of developing a strategic plan, however, it is important to identify and agree upon designated boundaries.

Once you draw your map, write out your north, south, east and west boundaries below. Note special shapes.

North Boundary: _____

South Boundary: _____

East Boundary: _____

West Boundary: _____

Special:

Information Gathering Step 2: SWOT Analysis

Strengths, Weaknesses, Opportunities and Threats (SWOT): It is important to take stock of the neighborhood. A SWOT analysis is a powerful way to break down and lay out the elements of the neighborhood that need to be considered to make an informed plan.

Strengths and Weaknesses are internal characteristics of the neighborhood. What is going on inside the neighborhood? How is it strong and what can be improved?

Opportunities and Threats are external. What things are not inside of the neighborhood but do or will influence it. What opportunities can the neighborhood benefit from? What forces threaten the wellbeing of the neighborhood?

Internal Attributes

| Strengths | Weaknesses |
|-----------|------------|
| | |

External Attributes

| Opportunities | Threats |
|---------------|---------|
| | |

Information Gathering Step 3: Identifying Assets

What tangible and intangible assets do residents of the neighborhood or the organization have access to? Assets can be physical (buildings and parks), institutional and organizational (churches, schools and associations), informational (libraries and vocal citizenry), or skill-sets (carpentry, youth-outreach or grant-writing). Think outside the box, anything or anyone can be an asset!

Below, brainstorm potential assets for the neighborhood. Identify whether they are handy or they would need to be mobilized.

Asset: _____ Ready ___ Needs Mobilization ___

Plan Development – The What

Plan Development Step 1: Vision

If this organization is successful, what will the neighborhood look like in the long term? Think 10+ years. What will the place look like physically? Who will live here? How will people behave? What are the ideal attributes of this neighborhood?

Questions to Consider – For discussion, do not feel limited by these questions!

- 1. **What neighborhood is represented?** _____
- 2. **When will the vision be realized?** _____
- 3. **What will the neighborhood look like physically?**

- 4. **Who will live there, work there, worship or learn there?**

- 5. **What will the culture of the neighborhood be?**

- 6. **What else would you like to see in your neighborhood?**

Draft your Vision Statement Here

Plan Development Step 2: Mission

Why does this organization exist? What is its purpose and whom is it intended to benefit? The mission statement should tell anyone who reads it what the value of this organization is.

Questions to Address – Should be included, but don't feel limited to these alone

1. What organization are we talking about?

2. What is the subject of the organization's actions (the neighborhood should be named here)?

3. Who will benefit from the efforts of the organization? Who are the stakeholders?

4. What will be different about the neighborhood? How will stakeholders benefit from the work this organization does (think more concretely than the vision)?

Draft your organization's mission statement here:

Plan Development Step 3: Goals

What must be accomplished to fulfill the mission of the organization? Think more specifically than the mission. They should directly address what will be different if the mission of the organization is achieved.

Goals should be distinct from one-another and contribute to the mission and vision. If a goal doesn't logically relate to the mission of the organization, it should be reconsidered. What distinct end products will the organization produce? Start with a subject; what is the thing that will be different? Then a descriptor; how will that thing be different?

To start, brainstorm a list of potential goals. The group should work together to eliminate the ones that may not fit. Look for redundancy; combine goals that may be getting at the same point. Try to narrow down to a handful of goals; there is no hard-and-fast rule, but 3 to 5 goals may be appropriate. This is a matter of group preference.

Use these lines to brainstorm what will change and how it will change:

What _____, How _____

Now eliminate and prioritize...

Use the space below to write your organizations agreed upon goals in affirmative, purposeful language. Weak language casts doubt as to whether this goal can be realized.

Note: There are extra spaces provided for your convenience, not all spaces must be filled.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

Goal 6:

Goal 7:

Goal 8:

Plan Development Step 4: Objectives

How will the organization achieve its goals? Objectives should be Specific, Measurable, Achievable, Realistic and Time-bound (SMART). Objectives are more specific than goals. Objectives should be outcomes. Achieving objectives leads to fulfilling goals. Some objectives can fulfill more than one goal, but all must relate to at least one goal.

Developing objectives is a multi-step process and may take some time. To start, think about your goals. Try to work on one goal at a time, thinking about what needs to happen for that goal to become a reality. Objectives will need to be SMART. Once you determine what the objective is, begin defining it and refining it. Check whether your objective meets each criteria of SMART. It may relate to more than one goal, but must relate to at least one. Like goals, there is no prescribed amount. Between 3 and 6 objectives per goal should be about right.

Brainstorm first – Use the space below to come up with ideas. Objectives will be refined after.

Goal 1

Goal 2

Goal 3

Goal 4

Goal 5

Goal 6

Goal 7

Goal 8

Refine Objectives – On the lines below, start detailing the objectives you’ve brainstormed. For your convenience, try this language template and insert your own content in the parentheses:

By (WHEN), this group will (INCREASE, DECREASE, CREATE, ELIMINATE, Etc.) (THE THING THAT WILL BE CHANGED) by (TARGET AMOUNT) as indicated by (MEASUREMENT CRITERIA).

When you write your objectives, you may want to identify them by number for easy reference by the group in the (Goal#. Objective#) format. Example (1.1), (1.2), etc.

You may want to do this digitally so edits can be made quickly and easily. A chalk board or whiteboard can also be useful for this purpose. When the final wording for the objective is settled, use the next several pages to lay out your goals and objectives. Check that each one is SMART.

Goal 1:

Objective 1.1: S__ M__ A__ R__ T__

Objective 1.2: S__ M__ A__ R__ T__

Objective 1.3: S__ M__ A__ R__ T__

Objective 1.4: S__ M__ A__ R__ T__

Objective 1.5: S__ M__ A__ R__ T__

Objective 1.6: S__ M__ A__ R__ T__

Objective 1.7: S__ M__ A__ R__ T__

Objective 1.8: S__ M__ A__ R__ T__

Goal 2:

Objective 2.1: S__ M__ A__ R__ T__

Objective 2.2: S__ M__ A__ R__ T__

Objective 2.3: S__ M__ A__ R__ T__

Objective 2.4: S__ M__ A__ R__ T__

Objective 2.5: S__ M__ A__ R__ T__

Objective 2.6: S__ M__ A__ R__ T__

Objective 2.7: S__ M__ A__ R__ T__

Objective 2.8: S__ M__ A__ R__ T__

Goal 3:

Objective 3.1: S__ M__ A__ R__ T__

Objective 3.2: S__ M__ A__ R__ T__

Objective 3.3: S__ M__ A__ R__ T__

Objective 3.4: S__ M__ A__ R__ T__

Objective 3.5: S__ M__ A__ R__ T__

Objective 3.6: S__ M__ A__ R__ T__

Objective 3.7: S__ M__ A__ R__ T__

Objective 3.8: S__ M__ A__ R__ T__

Goal 4:

Objective 4.1: S__ M__ A__ R__ T__

Objective 4.2: S__ M__ A__ R__ T__

Objective 4.3: S__ M__ A__ R__ T__

Objective 4.4: S__ M__ A__ R__ T__

Objective 4.5: S__ M__ A__ R__ T__

Objective 4.6: S__ M__ A__ R__ T__

Objective 4.7: S__ M__ A__ R__ T__

Objective 4.8: S__ M__ A__ R__ T__

Goal 5:

Objective 5.1: S__ M__ A__ R__ T__

Objective 5.2: S__ M__ A__ R__ T__

Objective 5.3: S__ M__ A__ R__ T__

Objective 5.4: S__ M__ A__ R__ T__

Objective 5.5: S__ M__ A__ R__ T__

Objective 5.6: S__ M__ A__ R__ T__

Objective 5.7: S__ M__ A__ R__ T__

Objective 5.8: S__ M__ A__ R__ T__

Goal 6:

Objective 6.1: S__ M__ A__ R__ T__

Objective 6.2: S__ M__ A__ R__ T__

Objective 6.3: S__ M__ A__ R__ T__

Objective 6.4: S__ M__ A__ R__ T__

Objective 6.5: S__ M__ A__ R__ T__

Objective 6.6: S__ M__ A__ R__ T__

Objective 6.7: S__ M__ A__ R__ T__

Objective 6.8: S__ M__ A__ R__ T__

Goal 7:

Objective 7.1: S__ M__ A__ R__ T__

Objective 7.2: S__ M__ A__ R__ T__

Objective 7.3: S__ M__ A__ R__ T__

Objective 7.4: S__ M__ A__ R__ T__

Objective 7.5: S__ M__ A__ R__ T__

Objective 7.6: S__ M__ A__ R__ T__

Objective 7.7: S__ M__ A__ R__ T__

Objective 7.8: S__ M__ A__ R__ T__

Goal 8:

Objective 8.1: S__ M__ A__ R__ T__

Objective 8.2: S__ M__ A__ R__ T__

Objective 8.3: S__ M__ A__ R__ T__

Objective 8.4: S__ M__ A__ R__ T__

Objective 8.5: S__ M__ A__ R__ T__

Objective 8.6: S__ M__ A__ R__ T__

Objective 8.7: S__ M__ A__ R__ T__

Objective 8.8: S__ M__ A__ R__ T__

Congratulations! You have completed the elements of *The What*. Now it is time to move on to Implementation – The How...

Implementation Step 1: Action Steps

What steps will be taken to accomplish the objectives? Specifically: who will do what; how will they do it; by when; and what tools do they need?

There may be a few action steps per objective. Some action steps may relate to more than one objective. Once each action step is determined, answer the following questions:

Who?

How will they do it?

By when?

What do they need?

There are several places to start thinking about implementation. There is no right or wrong as long as all of the important questions are answered. You may consider forming a committee for each goal. That committee may work together to determine what action steps are necessary to accomplish each objective. The whole group may want to go objective by objective; it is a matter of group preference. It may help to add another digit to the numbering system for action steps. (Goal #. Objective #. Action step #)

The following pages will give you space to work out your action steps. To make things less confusing, number each. You'll need to refer to your objectives, so have them handy.

Action Step __.__.__: _____

Who: _____ By when: _____

How:

What they need:

Action Step __.__.__: _____

Who: _____ By when: _____

How:

What they need:

Action Step __.__.__: _____

Who: _____ By when: _____

How:

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Action Step . . : _____

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Who: _____ By when: _____

How:

What they need:

Action Step __.__.__: _____

Who: _____ By when: _____

How:

What they need:

Action Step __.__.__: _____

Who: _____ By when: _____

How:

What they need:

STOP! This is the LAST PAGE of fill-ins! If you need more, you may want to make some copies!

Implementation Step 6: Evaluation

Check in regularly. Keep track of the measurement criteria. Are the objectives on their way to achievement? If so, great! Keep up the good work! If not, what changes need to be made?

Evaluation is a critical step in implementation. Regular evaluations will tell you whether the action steps are being implemented, and whether they are working.

Those with designated responsibility for certain action steps should check in on a regular basis. Some groups choose to do this every meeting. Consider some of the following questions when evaluating.

What steps have been taken since last evaluation?

Do those steps contribute to completing the action step?

Do those steps contribute to the objective?

Is the group satisfied with this outcome?

If not, what needs to be done differently?

Important: Evaluation of the action step should be free of personal judgments. If an outcome is unsatisfactory, explore the reasons for this but try to avoid accusing language or attacking one another. This process should be constructive!

Conclusion

Congratulations! You've developed a well thought-out strategic plan for your community organization; established measurement criteria and prepared the plan for implementation!

We will conclude with a few final tips:

- **Package your work and create a product:** That your group has spent so much time and energy developing this plan is indicative of a high level of dedication. Your work deserves to be packaged. You need not publish a fancy and elaborately bound report, but do your work justice by producing a nice packet that you would feel proud to hand to a partner from any walk of life.
- **Produce a narrative when appropriate:** Bullet points are handy for organization, but you also want to tell a story. Tell your reader what happened in an engaging way.
- **Add a brief description of the neighborhood:** Not everyone who reads the plan will know about the neighborhood. Give the reader some background.
- **Acknowledge your planning team and partners:** Your whole team has done great work and deserves recognition! Put your names on the final product! Acknowledge any partners who have contributed.
- **This plan has value:** You have written your plan using the same structure as government agencies and large corporations. The difference is that the plan was written by the people who know the neighborhood best. This document has legitimacy and value. Don't let anyone treat it otherwise.
- **Implement the plan:** The plan must be implemented! If the document sits on a shelf and is never acted on, it won't do your community any good!
- **Celebrate Accomplishments:** When you fulfill a goal, achieve an objective or succeed in any way, celebrate your achievement and make sure it is visible to the community! Success is a powerful recruiting tool.