# Route (Two Pins With A Path) with solid fillRoad Map for Success

Strategic Planning and Action Planning

Congratulations on setting your organization up for success by engaging in a planning process! In partnership with the NAMI Field Capacity Team, we hope this Road Map for Success is helpful in laying out the steps to strategic planning and action planning. Whether you’ve planned before, or this is your first time, we hope you will find something useful in this Road Map and accompanying toolkit. Initiating the process and having conversations about how to approach your long-term goals is the hardest part but will truly benefit your NAMI organization.

The toolkit includes:

1. This Road Map, a step-by-step guide to planning, which includes each step in the process and considerations you should think about at each step;
2. A curated list of resources on strategic planning, action planning, and goal setting, including templates you can use; and
3. Sample plans, action plans, and goal setting tools from across the Alliance.

We encourage you to review this Road Map, and the rest of the toolkit, in partnership with you NAMI Field Capacity Building Point of Contact or NAMI State Organization staff (if you are an affiliate). They can help you think through your organization’s current capacity and help you develop a plan that works best for you. The information in this Road Map is designed to share a suggested process but there are many approaches you can take to planning. Find the approach that works for your organization and feel free to adapt or change anything in this Road Map to better fit your needs. And enjoy planning!

# STEP 1: STRATEGIC PLANNING VS ACTION PLANNING

Strategic planning and action planning (sometimes referred to as goal setting) are similar and complementary processes that allow organizations to formulate their long- or short-term visions and goals for their work and determine how they will reach those visions and goals.

One of your first steps will be to decide whether you are interested in long-term strategic planning (which also includes an action plan) or if you would prefer to develop a short-term action plan. Strategic planning has you evaluate your overarching goals and direction for your long-term work. Action planning helps you implement processes for accomplishing those goals. A strategic plan will usually include action planning, but an action plan will likely not require a full strategic plan.

Both strategic planning and action planning are important to the success of organizations. Oftentimes, it is beneficial to start with action planning if you are undergoing a planning process for the first time or if you do not have the organizational capacity for a full strategic plan. It can provide a solid foundation for your short-term work as well as long-term strategic planning in the future. You should decide on what process will work for you given your current circumstances – it should work for your organization’s current capacity and interest.

How do you know whether you are better positioned to engage in action planning or strategic planning? Take a look at the following chart and don’t forget, it’s important to be flexible with both your process and your terminology! Engaging in any kind of planning process is a huge step forward for your organization’s capacity.

# Action Planning Versus Strategic Planning: Meeting Your Organization Where It Is

When deciding whether to develop and implement an Action Plan versus a Strategic Plan, you may consider the following suggested criteria before deciding. These criteria can help you gauge your current capacity as an organization and, therefore, what makes the most sense for your organization in the present. An Action Plan is often a stepping-stone to a Strategic Plan. If you have difficulty deciding what is best for your organization, reach out to your NAMI Field Capacity Building team Point of Contact or NSO for guidance. The Field Capacity Building team is always here to support your planning efforts.

|  |  |
| --- | --- |
| **Action Plan** | **Strategic Plan** |
| **Definition** | |
| Short-term (3 to 12 months)   * Stepping-stone(s) to help you reach big goals. The focus is on fixing current issues/problems in the short term to help reach big goals. | Long-term (1 to 5 years)   * Big goals that take a longer time to reach. More tactical. More steps involved. |
| **Current Capacity** | |
| No Mission, Vision, or Values | Articulated Mission, Vision, and Values |
| Staff (1-3) | Staff (4 or more) |
| No Board/Inactive Board | Active Board |
| Budget less than $100 K | Budget $100 K or higher |
| Unpredictable funding stream | Predictable funding stream (1 to 3 years) |

Strategic Planning and Action Planning

# STEP 2: PLANNING TO PLAN

Strategic Planning and Action Planning

Before beginning the strategic or action planning process, it is important to ensure that you have the proper foundation in place. Review your previous strategic plans and action plans, as well as [NAMI National’s five-year strategic plan](https://nami.org/NAMInet/Board-of-Directors/Governance-Documents/NAMIStrategicPlan2020#:~:text=Page%204-,NAMI%20envisions%20a%20world%20where%20all%20people%20affected%20by%20mental,illness%20can%20build%20better%20lives.). NAMI’s strategic plan can be your “North Star” – your overall direction for your organization. We’ve provided some sample strategic plans and action plans from across the Alliance as samples for you.

**Then, think through the following**:

**History**

* + **What has strategic planning or action planning looked like for us in the past?**
  + **Were our past plans measurable and actionable?**
  + **Did we use our past plans? Why or why not?**
  + **What lessons can we learn from past planning?**

Review past processes as well as past plans. Does anything need to carry over from previous plans? If so, how will you incorporate them into your new planning process? Are there any lessons to be learned from your past?

**Notes:**

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Strategic Planning and Action Planning

**Current State**

* + **What does strategic planning (or action planning) mean to us currently?   
    What do we want to accomplish by engaging in this process?**
  + **Do we want to engage in strategic planning or shorter-term action planning or something else?**
  + **What time frame are we planning for? Short term (6-12 months) or longer (1-5 years)?**
  + **What do we want to walk away with?**
  + **How will NAMI’s strategic plan guide our work?**
  + **If you are an affiliate, how will our state’s strategic plan, if applicable, guide our work?**

**Notes:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Facilitation**

Strategic Planning and Action Planning

* + **Who will facilitate our strategic or action planning?**

We recommend someone outside of the process, such as NAMI National staff or, if you are an affiliate, NAMI State Organization staff, to be a neutral facilitator and allow the ED and Board to all actively participate.

**Notes:**

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**Time Commitment**

* + **What time do we have to contribute to planning?**

Think about when you would like to finalize your plan, as well as what time and resources you can feasibly contribute to planning. If you have limited time to get a plan developed, an overarching, detailed strategic plan might not work for you, but an action plan or goal setting might be a better fit.

**Notes:**

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**Stakeholders**

* + **Who are our stakeholders?**
  + **Who are the people who are most familiar with our work, what we do, and who we serve? (e.g., NAMI National, Board, staff, volunteers, families/individuals served, affiliate leaders/program leaders etc.)**

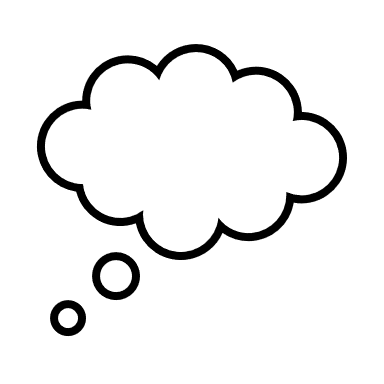
If you are a NAMI State Organization, you’ll want to think about when and how to engage affiliates in your planning. If you are an affiliate, you’ll want to decide whether to engage your NSO in the process.

There will be various levels of stakeholders, including:

* 1. The “core team”: staff, board members, and others who need to be actively engaged in the strategic or action planning process from the beginning, vital to the development of the plan
  2. The “contributors”: staff, volunteer leaders, members, and other stakeholders who may inform one or more pieces of the plans but who may not be involved in a depth way in the planning process.
  3. The “informed”: those who need to be informed of the progress and final product, but do not contribute to the planning process.

**Notes:**

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**Consider this …**

Strategic Planning and Action Planning

* **Are we ready for change?**
* **If we are not ready for change, what can we do to begin to adapt to the idea of change?**

Think about evaluating your change readiness. There are many available tools you can use to determine if your key stakeholders, including the core team and contributors, are ready to make a change. One such change readiness tool that we recommend is available at: <https://oprp.dor.org/wp-content/uploads/2016/04/Change-Ready-Scale.pdf>. If you find that your stakeholders are not ready for change, you may want to do some work to prepare for planning. The Field Capacity Building team can recommend resources to assist you in increasing your organization’s change readiness.

You can work with your NAMI Field Capacity Building Point of Contact or NSO to evaluate your capacity and determine the best next steps for your organization.

**Notes:**

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# STEP 3: DEVELOPING A PLAN

Once you have completed the pre-planning process, you are ready to get started on your plan! Based on the conversations you’ve had, you should have decided on the type of plan you are creating, what time frame it will be for, and who will participate in the process, as well as some other details. If you have determined that a short-term action plan or goal setting is most appropriate for your organization, please go to section 3B. If you have determined that a longer-term, full strategic plan is best for you, please start at section 3A and complete both parts of step 3.

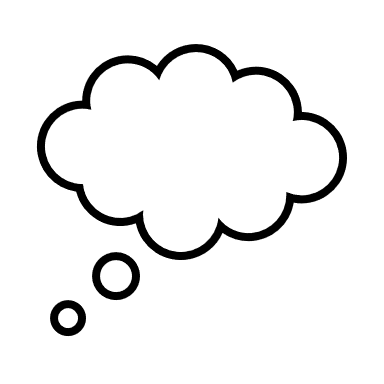
# Strategic Planning (3A)

Strategic Planning and Action Planning

If you are engaging in long-term strategic planning, you want to develop an overall plan to determine your organizational goals. Think through the following questions to develop your goals.

**What is our value proposition?**

The value proposition will help you determine what you do well and where you make the most impact. These are the areas you will want to focus on when developing your plan. You can find the [value proposition worksheet on NAMINet](https://www.nami.org/NAMI/media/NAMInet/Ops-Gov/FINAL_NAMI_Value-Proposition-Worksheet-v2.pdf) and included in this workbook as worksheet #1.

**Consider the following…**

* **What does our SWOT analysis look like?**

The SWOT analysis is an opportunity to have open and free-flowing conversations about your organization’s strengths, opportunities for improvement, opportunities, and threats. Make sure everyone has an opportunity to actively participate and brainstorm during this section. You can use this information as you think through your strategic goals. (See worksheet # 2)

* **What are the biggest needs of our organization and/or members?**

Conduct a needs assessment such as the [organizational capacity assessment tool](https://www.socialventurepartners.org/svp_resources/organizational-capacity-assessment-tool/) or a [community needs assessment](https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/develop-a-plan/checklist), or use the results of your NAMI Organizational Health Assessment Survey or Field Capacity Building Tool results. Your Field Capacity Building Point of Contact or NSO can help you think about your areas of opportunity and growth.

**Notes:**

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* **What are three to five things our organization wants to do in the time frame we are planning for?**

Dream big – resources are no object. This exercise is designed to get your creative juices flowing about all the great things you could do. Some of these things may be long-term goals that you cannot accomplish right now but want to keep on your organization’s radar – we call them parking lot goals. If the opportunity arises, you may want to seize it. Do not lose sight of these “big dreams.” Keep them visible and review them regularly. Maybe your capacity to achieve your dreams has changed!

**Notes:**

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* **What resources do we have available to us? What is the best use of our resources? Which of our dreams are feasible?**

Think about staff and organizational capacity, financial resources, etc. It is time to prioritize. Evaluate, based on your SWOT analysis and dream big exercise. Think about what resources you can feasibly dedicate to your goals and what is realistic. This will begin to narrow down your list of goals to those that are reasonable.

Strategic Planning and Action Planning

**Notes:**

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# Action Planning (3B)

Strategic Planning and Action Planning

The next step (or first step, if you are completing an action plan) is developing a game plan to achieve the goals you have identified. What steps need to be taken? Refer to the definitions of the terms used in this section and Worksheet #3.

Feel free to customize the language and definitions you use; the important part is that all of your stakeholders are aligned on what your process looks like and what terminology you are using. For example, most of the references we provide use goal and objective interchangeably. Please make note of this difference. If you are strategic planning, think of longer term goals that fit the time period you want your plan to cover. If you are action planning, you should aim for a shorter-term time period that you think you can accomplish.

1. **GOALS**

**Based upon our needs and resources, what are 1-2 goals we would like to meet in the time frame of our plan?**

Consider what your organization is trying to accomplish, your SWOT analysis, if you did one, and your resources. Goals should be overarching, large-scale, and broad. They should be accomplishable in your identified time frame.

**Example Goal**: Increase our services for people with mental illness who are incarcerated.

**Notes about goals:**

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1. **OBJECTIVES**

For each goal, identify 1-2 objectives. An objective is the precise action or measurable step taken to achieve the goal.  These are also known as SMARTIE goals, depending on the resource or template used.

**Example Objective**: By the end of 2022, have at least one program in most state prisons.

1. **STRATEGIES**

For each objective, identify 1-2 strategies. A strategy is a plan or method to achieve a given objective.

**Example Strategy**: Facilitate Connections support groups in state prisons.

1. **TACTICS**

For each strategy, identify 2-3 tactics. A tactic is a specific action or step taken to achieve a strategy.

**Example Tactic**: Reach out to state prison administrators to educate about the value of our programming and how we can incorporate them into prisons.

**Example Tactic**: Ensure we have trainers for increased programming.

**Example Tactic:**  Begin hosting a Connections support group in X prison.

1. **KPI/TARGET**

Identify 1-2 KPIs/TARGETS you would like to achieve.A key performance indicator/target (KPI/target) measures the success of the objective. They should be related to your objective, not your specific strategies or tactics.

**Example KPI/Target**: By the end of 2022, we will have Connections support groups in 5 state prisons.

# STEP 4: IMPLEMENTING YOUR PLAN

Strategic Planning and Action Planning

The final step in any planning process is to decide how you will implement your plan and hold yourselves accountable to make progress.

**Think through some of the following questions:**

* **How will we define success?**
* **How will we operationalize our plan?**
* **Who will be responsible for each piece of our plan?**

Decide who will be responsible for each part of your project. You can do this using [MOCHAs](https://www.managementcenter.org/resources/assigning-responsibilities/) and project plans. A MOCHA is a project management framework that helps define the roles that individuals will play in accomplishing the goal. Completing a MOCHA for each goal or objective allows an organization to determine roles and responsibilities of staff members, Board members, and other stakeholders in achieving goals. The Management Center uses the following definitions for the roles of a MOCHA:

Manager: Supports and holds owner accountable through delegation. Serves as a resource, shares feedback, asks probing questions, reviews progress, and intervenes if the work is off-track. This person may or may not be the owner’s supervisor.

Owner: Has overall responsibility for driving the project forward and coordinating steps to accomplish the goal. Ensures all the work gets done (directly or with helpers) and involves others (consults) in a meaningful way. There should only be one owner.

Consulted: Provides input and perspective. May share resources or referrals.

Helper: Implements aspects of the work and actively contributes to project success.

Approver: Signs off on the final product or key decisions. May be the owner or manager, though it can also be a person or group with a clear decision-making role on the project.

If you don’t need a full MOCHA, it is still helpful to assign responsibilities to individuals, so that there is clarity around roles.

Also, think about your timeline for reaching goals and how you will ensure work gets done to meet your goals. This is the important follow-through that is needed!

**Notes:**

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**How will we hold ourselves accountable?**

How will you make sure that you are centering your plan in your work? The last thing you want is to develop a plan and then have it sit on a shelf being ignored. Ideally, someone (usually the Executive Director and/or the Board President/Chair) should ensure that the organization re-visits the plan and uses it to make decisions and plan the organization’s work.

Here are some suggestions for centering your plan in your work:

* Make a check-in about your plan a standing part of your Board meetings and/or staff meetings. Think about how often you will check in and a method for the check-ins that works for you.
* One suggestion for tracking progress over time – you can use a color-coded system (red = not progressing, at risk of a missing milestone, yellow = moving ahead, but facing some challenges, green = moving ahead as planned)
* Use staff reports to provide updates to the Board.

**Notes:**

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* **What is our timeline for completing our objectives?**

Strategic Planning and Action Planning

* **What are some milestones we can use to incentivize our work?**
* **How will we revisit our “parking lot goals” or big goals that we couldn’t include in our planning this time around?**

It is important to ensure that you do not forget about your identified goals that could not be addressed this time around but could be accomplished in the future. Keep those “parking lot goals” on your radar for the future!

**Notes:**

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Strategic Planning and Action Planning

Worksheets

**Value Proposition Worksheet**

Strategic Planning and Action Planning

Worksheet # 1:

The purpose of this worksheet is to help your NAMI Organization practice defining its Value Proposition. A Value Proposition is a broad, concise and clear statement of the value or benefit your organization provides to a target audience that can help you build organizational capacity. Your Value Proposition may vary based on your audience. Our suggestion would be to use one worksheet for each audience to help you focus on the needs of the specified group. This will help you develop a refined Value Proposition that is audience focused.

The first step is for you and your team to respond to questions 1-5. Once you do this, you can begin crafting your Value Proposition.

1. **Who is your NAMI Organization’s target audience?**

***This focuses on groups your organization is trying to reach and engage. It may include individuals/families impacted by mental illness, donors, members, volunteers, leadership/staffing talent, policymakers, other organizations, agencies, companies, etc.***

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1. **What are the needs of this audience?**

***Know your audience! This focuses on the problem(s) the target audience seeks solutions for.***

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1. **What benefits does your NAMI organization offer?**

***This includes your programs, activities, services, events and other offerings.***

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Strategic Planning and Action Planning

Worksheet #1

1. **What organizations are doing something similar to your organization and what makes your organization different?**

***This includes organizations that might be considered your competitors.***

1. **Link the benefits of your NAMI organization back to the needs of the target audience.**

***This involves making a connection between the needs of the target audience and the benefits you offer.***

1. **Value Proposition Statement**

***Given your responses above, think about a broad, concise and clear statement that will help convince your target audience to engage with your organization, use your benefits and take actions that advance your mission.***

**TIPS:**

* + **Keep practicing! This will help you define and refine your Value Proposition.**
  + **Revisit and refresh your value proposition as you grow your capacity and skills.**
  + **Contact the Field Capacity Building team for technical assistance at** fieldcapacity@nami.org.

Strategic Planning and Action Planning

Worksheet # 2:

**SWOT Analysis**

|  |  |
| --- | --- |
| **STRENGTHS**  What do we do well? What are our core competencies? What differentiates us from others? | **WHERE CAN WE IMPROVE? (WEAKNESSES)**  What resources are we missing? Where do we have room to grow? What do others do better than us? |
| **OPPORTUNITIES**  What new trends/circumstances provide new opportunities for us? How can we innovate to meet new needs? | **THREATS**  What new trends/circumstances may be harmful to us? What could be an obstacle to our success? |

**ACTION PLANNING/ GOAL PLANNING CHART**

Below is a sample goal planning chart that aligns with this recommended action planning process. If you are interested in other types of goal setting charts or worksheets, please see the Strategic Planning and Action Planning Resources document that accompanies this roadmap.

*Please note, these resources might use other alternative terminology. You can use whatever terminology works best for you, as long as all stakeholders are on the same page.*

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| --- | --- | --- | --- | --- |
| **Goal:** | | | | |
|  | **Objectives** | **Strategies** | **Tasks** | **KPI/Target** |
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**PROJECT TASK PLAN WORKSHEET**

**Goal:**

**Objective or Strategy:**

**Purpose of this Project Task Plan:**

The purpose of this Project Task Plan is to provide a comprehensive plan for our goal including tasks, how they will be achieved, who is involved, resources needed, and how we will track progress.

**MOCHA or who is responsible for the overall goal:**

**Task Plan:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task** | **Due Date** | **Person(s) Responsible and/or MOCHA** | **Resources Needed** | **Notes/Status** |
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Strategic Planning and Action Planning

Worksheet # 4: