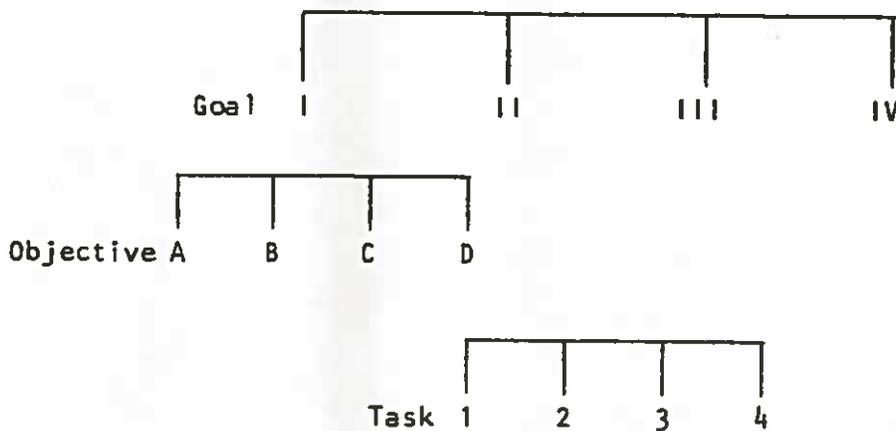


D R A F T

Outline for Strategic Planning

Strategic planning can be in an hierarchical fashion, with each element in the hierarchy getting more detailed.

Purpose/Mission



The purpose, or mission, statement is the very broad level. It is the "reason for being" now and in the future. It can get incorporated in Bylaws or Constitutions or Articles of Incorporation. It is, therefore, the most difficult to change.

Goals are one step below mission. They are the overall aims that support the purpose, but are still rather broadly defined. They can be changed, e.g., in a five-year-plan. There should not be too many of them.

Objectives are the next step under goals. These are more detailed and should be measurable in some way, e.g., by time, quantity, quality, or specific product/deliverable. These can be set for one year at a time.

Tasks are the most detailed level, coming under objectives. Here is where a list of exactly what needs to be done is given. Staff and implementation schedules can be assigned to the tasks. These get reviewed frequently, e.g., quarterly, by large groups and weekly, or even daily, by a project manager.

Some strategic plans include a set of written assumptions upon which the goals were based, e.g., that automating DALNET libraries jointly is feasible given today's technology.

Following the listing of tasks, a detailed budget can be prepared indicating all resources needed to accomplish them and the amount needed over time.

LB/ff
9/5/84