WRITING YOUR STRATEGIC PLAN

SOCIAL SCIENCE TOOLS FOR COASTAL PROGRAMS

The Second Workbook for the Strategic Planning Process

SOCIAL SCIENCE WORKBOOK SERIES

NOAA Coastal Services Center
LINKING PEOPLE, INFORMATION, AND TECHNOLOGY

Social Science Tools for Coastal Programs

Writing Your Strategic Plan

The Second Workbook for the Strategic Planning Process

About This Publication

Writing Your Strategic Plan is part of the NOAA Coastal Services Center's social science workbook series and is a companion to, and continuation of, *Preparing to Write Your Strategic Plan*.

While the companion workbook provides the tools to gather the information needed for the foundational components of a strategic plan, *Writing Your Strategic Plan* shows how to use this information to articulate meaningful vision statements, focused goals, and achievable objectives.

To view this publication, the companion workbook, and other titles, visit *www.csc.noaa.gov/publications*.

About the NOAA Coastal Services Center

The National Oceanic and Atmospheric Administration (NOAA) Coastal Services Center works with state and local programs devoted to the wise management of our nation's coastal resources. The Center provides these programs with tools, training, and expertise that might otherwise be unavailable. To learn more about the products and services available from the Center, visit *www.csc.noaa.gov*.
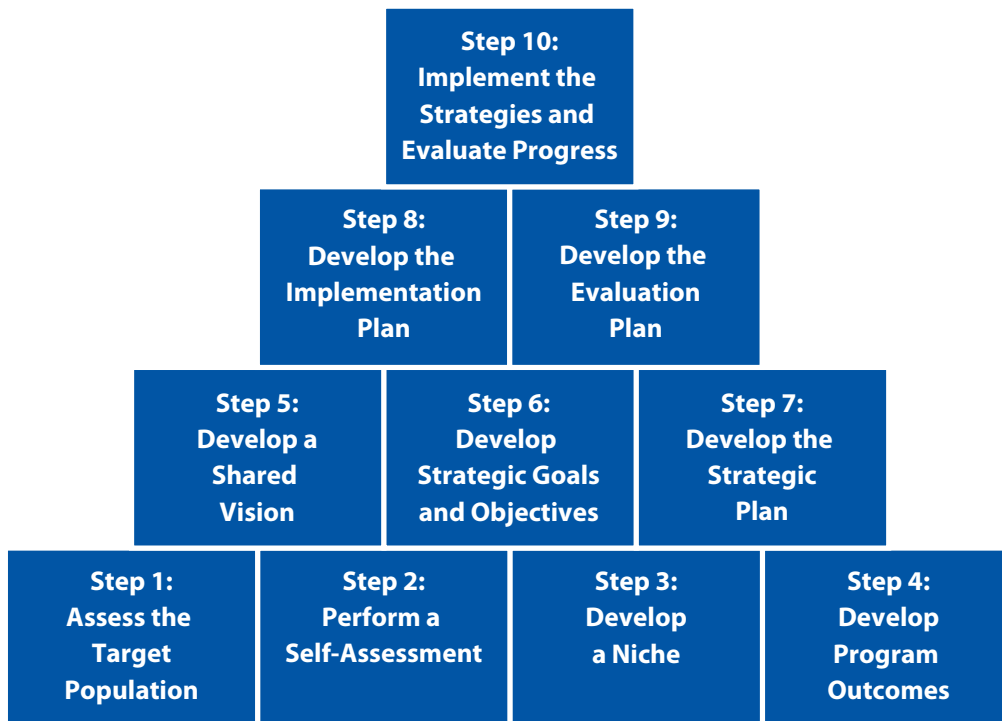
Table of Contents

Figure 1 – Strategic Planning Pyramid

Introduction

Strategic planning is a process organizations use to assess their direction and priorities. This planning is important, and it requires time, effort, and deliberate steps to be done well. Those carrying out strategic planning must gather and analyze information to detect trends and set direction. They must then decide on the strategies, activities, resources, and evaluation methods that will help the organization reach its goals.

The first workbook in this series, *Preparing to Write Your Strategic Plan,* guides users in the collection of foundational information needed to develop a sound strategic plan. This companion workbook, *Writing Your Strategic Plan,* uses the gathered information and provides the framework to build organizational commitment and guide the development of the strategic plan. This groundwork makes the next step, plan implementation, much more likely to be successful.

Figure 1 shows a typical strategic planning process from initial information gathering to implementation and evaluation. *Preparing to Write Your Strategic Plan* covers the pyramid's foundation, steps 1 to 4. This publication focuses on the pyramid's second tier, steps 5 to 7, which culminates in a written strategic plan:

> 5. Develop a Shared Vision
> 6. Develop Strategic Goals and Objectives
> 7. Develop the Strategic Plan

Each part of the organization must be represented in the writing process. Not only does wide involvement ensure the gathering of all required information, but it also encourages a broad organizational ownership of the process and the results. Lack of ownership is the number one reason a strategic plan fails to achieve the desired results.

The appendixes offer many helpful aids. Appendix A provides an agenda template for the kick-off meeting. Job aids for compiling the strategic plan outline are included in Appendix B, and Appendix C provides a case study of a hypothetical organization undertaking this process. Appendix D contains implementation templates for next steps.

Organizations are structured in many ways, so the parts of an organization involved in the strategic planning process may be called programs, divisions, teams, or some other organizational unit. For the purposes of this workbook, the parts of the organization involved in strategic planning are referred to as *programs.*

The NOAA Coastal Services Center has additional publications, training products, and technical assistance to offer for all stages of the process. Contact the Center at *csc.info@noaa.gov* or visit the website, *www.csc.noaa.gov,* to learn more.

Step 5 – Develop a Shared Vision

Step 5: Develop a Shared Vision	Step 6: Develop Strategic Goals and Objectives	Step 7: Develop the Strategic Plan

This publication begins with the visioning meeting to "develop a shared vision." A vision focuses on the organization's future. It describes what an organization would like to achieve or accomplish and is intended to guide the current and future direction of the organization. Setting a vision requires an understanding of the target population's needs, the organization's ability to meet those needs, and the actions needed to carry this out.

Vision statements are therefore very important. This guiding statement is best developed at a meeting where participating programs can engage in a conversation about their audiences, capabilities, and desired outcomes—the same foundational information collected in the *Preparing to Write Your Strategic Plan* workbook, steps 1 to 4. Once this information is shared, the group will have a better understanding of what each program is working to accomplish, and they can collectively define the impact the organization would like to realize in the future.

The output of the meeting or meetings is a vision statement that everyone present agrees to work toward, a statement that will guide the current and future direction of all programs. Appendix A contains an agenda template for a visioning meeting, during which a neutral facilitator may be employed to help ensure broad participation and ownership, and to keep the conversations focused.

The following is an example of a vision statement used by a partnership of coastal resource management organizations: "The Digital Coast is the most widely used and respected community resource for solving coastal management issues through the use of data, tools, training, and partnerships."

Once the vision is developed, the mission statement is the next step. A mission statement is a description of an organization's core purpose, focus, and target population. It is a succinct statement that describes the organization and what it does or will do, for whom, and why.

An example mission statement from the same partnership is here: "The Digital Coast Partnership improves coastal economies and ecological wealth by helping communities address their challenges with just, cost-effective, and participatory solutions."

OUTPUT – Conduct the visioning meeting (Appendix A). Complete job aid 1, "Developing a Vision and a Mission" (Appendix B).

Additional Information:

- A shared vision statement for a hypothetical organization can be viewed in the case study provided in Appendix C.

Step 6 – Develop Strategic Goals and Objectives

Step 5: Develop a Shared Vision	Step 6: Develop Strategic Goals and Objectives	Step 7: Develop the Strategic Plan
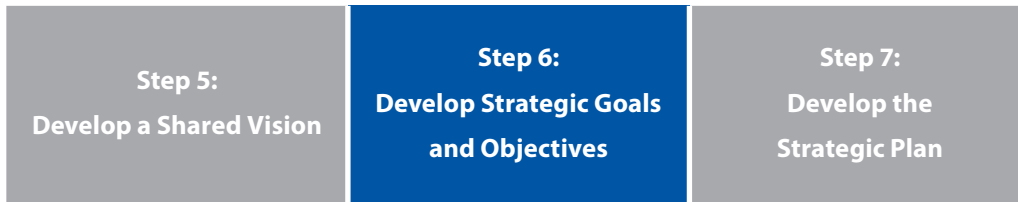
The strategic plan will be organized using goals and objectives.

The goal is the result or achievement toward which the effort is directed. It is broader and more general than an objective or an outcome. The goal is larger than the program and may result from the cumulative effect of many programs' outcomes. There is no perfect number of goals for a strategic plan; the collective actions of the programs should represent what is needed for the organization to reach its goals. There should be enough goals to reach the vision and cover each program's contributions. Representatives from each program should discuss the niche and outcome information each program gathered in steps 1 to 4 to determine overarching themes. Use the themes to develop broad organizational goals.

Once the goals are developed, the next step involves developing objectives. Well-written objectives clearly define how program goals will be achieved. Job aid 3 (Appendix B) describes how to develop SMART objectives.

SMART objectives contain the following characteristics:

Specific – Use specific verbs that describe observable changes in the outcome as a result of the project or program.

Measurable – Add a numerical target to the objective—something that can be counted.

Audience- or issue-directed – Focus the objective on changes that will occur within the audience, or to the issue being addressed.

Realistic and ambitious – What is the plausible change within the time frame? Use the target population assessment and the organization's SWOT (strengths, weaknesses, opportunities, and threats) analysis developed in steps 1 and 2 to ensure that the objective is attainable yet challenging.

Time-bound – Set a time limit for achieving the objective.

Using the numerical target in the objectives, a list of *performance measures* can be compiled. Performance measures are objective, quantitative variables related to the project's performance. Measures define what is important, provide feedback, and motivate action.
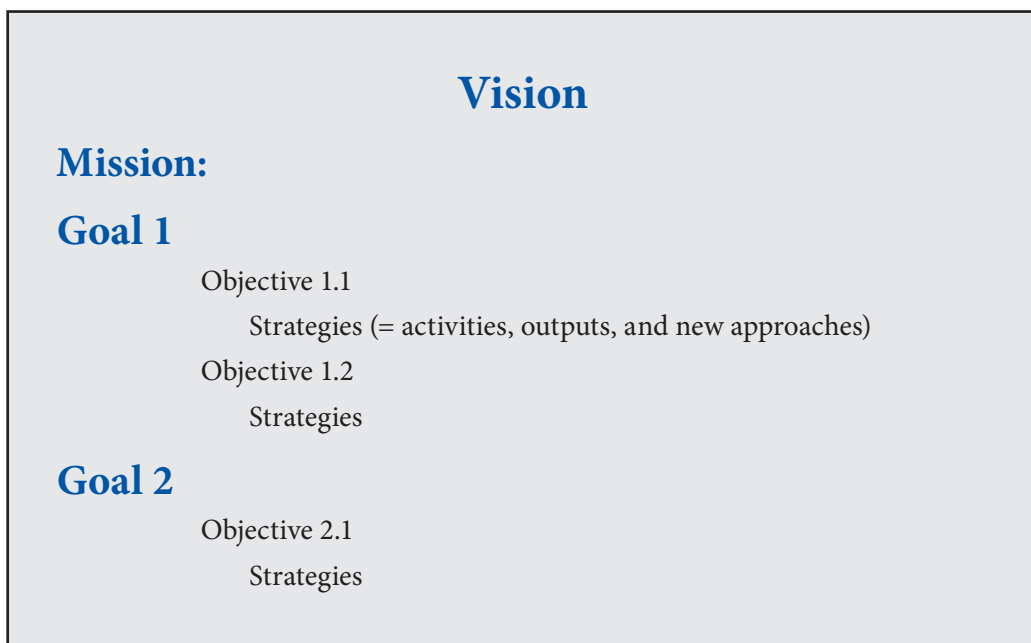
OUTPUT - *Complete job aids 2 and 3 (Appendix B).*

Additional Information:

- Goals and objectives for a hypothetical organization can be viewed in the case study provided in Appendix C.

Step 7 – Develop the Strategic Plan

Step 5: Develop a Shared Vision	Step 6: Develop Strategic Goals and Objectives	Step 7: Develop the Strategic Plan

When the vision, mission, goals, and objectives have been written, it is time to write the strategic plan. One often-used format is shown below.

<div>

Vision

Mission:

Goal 1

  Objective 1.1

    Strategies (= activities, outputs, and new approaches)

  Objective 1.2

    Strategies

Goal 2

  Objective 2.1

    Strategies

</div>

The preparation phase of the strategic planning process, described in *Preparing to Write Your Strategic Plan*, called for each program to develop new approaches to assist the target population in meeting its needs. Current activities and new approaches from each program can now be used to develop strategies that achieve each objective.

After the strategies for an objective are complete, an "if-then" test can be used to help ensure a sound cause-and-effect connection between the strategy (the action) and the desired outcome: "If all the strategies are completed, (then) will the objective be met?" If the answer is no, other strategies may need to be included for that objective. If there are not enough resources for all the strategies, the objective may need to be narrowed.

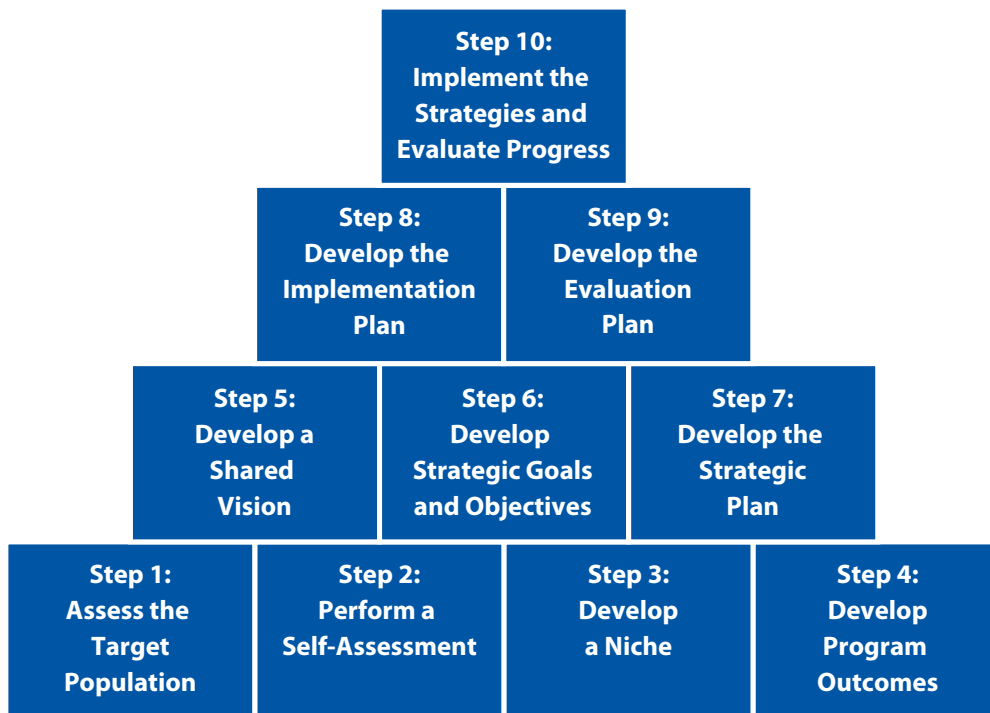The number and scope of the goals and objectives should be manageable. Organizations commonly have at least two goals, with two objectives for each goal. In most cases the goals and objectives are too broad if there are less than two, and too specific if there are more than five.

OUTPUT – *Complete job aids 4 and 5 (Appendix B).*

Additional Information:

- A strategic plan for a hypothetical organization can be viewed in the case study provided in Appendix C.

Next Steps – Implementing, Evaluating, and Adapting the Plan

Step 10:
Implement the Strategies and Evaluate Progress

Step 8:
Develop the Implementation Plan

Step 9:
Develop the Evaluation Plan

Step 5:
Develop a Shared Vision

Step 6:
Develop Strategic Goals and Objectives

Step 7:
Develop the Strategic Plan

Step 1:
Assess the Target Population

Step 2:
Perform a Self-Assessment

Step 3:
Develop a Niche

Step 4:
Develop Program Outcomes

Congratulations, the strategic plan is written! Developing the implementation plan that puts it into action is next. Two examples of an implementation plan template can be found in Appendix D.

Developing an evaluation plan in conjunction with implementation planning is the right thing to do. Taking these steps together will make both efforts more efficient and effective. This approach is showcased in the implementation plan templates found in Appendix D. Too often, evaluation is an afterthought, cobbled together reactively, and is less effective than it could be. The approach advocated through this template prevents ineffective evaluation by ensuring that performance measures are considered before implementation.

The NOAA Coastal Services Center offers a training course called Planning for Meaningful Evaluation (see *www.csc.noaa.gov/digitalcoast/training/meaningful-evaluation*) that guides participants through the development of a draft evaluation plan with effective performance measures. This course provides expert guidance, detailed information, and practice in applying evaluation concepts. Also available on the course's website is a brief document by the same name, which introduces key concepts from the course. Although both the course and document focus on planning for evaluation of specific projects or programs, the concepts are also applicable at the organizational level.

Additional Information:

- Implementation plan templates are provided in Appendix D.

References

Covey, Stephen R.W. 1989. *The Seven Habits of Highly Effective People*. Simon and Schuster. New York.

McReynolds, Charles, instructor. "Leadership Development in Natural Resources: Strategic Planning and Implementation." Online course. University of Wisconsin–Stevens Point. Available at *www.uwsp.edu/natres/eetap/spi_course_page.aspx*.

Mendenhall, Mark E. "Strategic Planning Failure." Website. Accessed December 2012 at *www.referenceforbusiness.com/management/Sc-Str/Strategic-Planning-Failure.html*.

U.S. Environmental Protection Agency, Office of Water. 2003. *Strategic Planning: A Handbook for Small Water Systems*. EPA 816-R-03-015. U.S. Environmental Protection Agency. Washington, D.C. Accessed December 2012 at *www.epa.gov/ogwdw/smallsystems/pdfs/guide_smallsystems_stratplan.pdf*.

Glossary

Activities: Those efforts or interventions designed and conducted to produce an outcome.

Audience: The subset of the target population that has engaged with the program.

Goal: The result or achievement toward which effort is directed. It is broader and more general than an objective or an outcome. The goal is larger than the program and may result from the cumulative effect of many programs' outcomes.

Impact: A program's sustained effect on the social, economic, or environmental condition (or any combination of the three).

Milestone: A notable point in development or implementation of a program that can be measured or tracked.

Mission: Description of an organization's core purpose, focus, and target population. A mission is the cause and the vision is the effect.

Objectives: Establish the standards of achievement in terms of a proportionate improvement in the existing condition. Objectives are SMART (specific, measurable, audience- or issue-directed, realistic and ambitious, and time-bound).

Outcomes: The changes expected as a result of the program or project.

- **Long-Term Outcomes** – The expected changes in a social, economic, or environmental condition as a result of the program or project.

- **Mid-Term Outcomes** – The plausible changes or human actions resulting from the achievement of the short-term outcome.

- **Short-Term Outcomes** – The expected immediate changes in the issue or audience resulting from the outputs.

Outputs: The tangible products and services resulting from activities.

Performance Measures: Objective, quantifiable indicators used to demonstrate the activities implemented, the outputs created, or the progress made toward outcomes.

Programs: The partitions developed within an organization that focus workloads.

Resources or **Inputs:** The funding, equipment, personnel, or other contributions needed to conduct activities and create outputs.

Strategies: The composite of activities and outputs designed to achieve outcomes.

Target Population: The individual, community, system, or other unit to which an activity or output is directed.

Vision: A description of what an organization would like to achieve or accomplish. It is intended to guide current and future direction. What the world would be like if the goal were achieved.

Appendix A:
Developing a Shared Vision – Sample Agenda

Strategic Planning Kick-Off Meeting Agenda

Elapsed Time	Topics, Objectives, and Activities	Facilitators, Supplies, Materials, and Notes
0:00	**Introduction, workshop overview, and objectives:** Know other participants; address meeting goals and objectives, expectations, and logistics. **Activities:** Each participant introduces him- or herself and gives a brief description of expectations for the meeting. **Total Time: 15 minutes**	Leader (highest-level person in room, preferably the one who has directed the development of the plan) Facilitator records expectations on a chart Markers, tape, flipcharts
0:15	**Icebreaker** **Objective:** Participants will interact, talk, and relax so that they know each other a little better. **Activities:** Icebreaker **Total Time: 15 minutes**	Leader can lead an icebreaker of his or her choosing. Icebreakers can be found here: *www.wilderdom.com/games/Icebreakers.html*
0:30	**Program presentations** **Objective:** Understand how each program contributes to the organization. **Activities:** Each program presents the prepared program presentation (10 minutes per program). Participants ask questions about the information in the presentation (10 minutes). After all the program presentations, the facilitator guides a large-group discussion about program commonalities (30 minutes). Recommend no more than six presentations **Break** (included in time above, usually after the fourth program presentation) **Total Maximum Time: 2 hours, 45 minutes** **(20 minutes per program + 30 minutes for discussion + plus one break)**	Program managers Facilitator leads questions and answers for each program Facilitator leads large-group discussion

3:15	**What is the impact the organization will help bring about?** **Objective:** Considering presentations from each program, participants will identify the strengths and weaknesses of the entire organization, and discuss and agree upon a shared vision and identity. **Activities:** The facilitator should use the visioning exercise most applicable for the audience. Two examples are listed. Option A: Facilitator explains the scenario: The year is 2027. The headlines in the newspapers praise your program for the impact you have had. What does the headline say? (10) Option B: Facilitator explains the scenario: The year is 2027. Your organization has won an award for its effect on the community. What was the award for? (10) Ask each participant to write down the answer to the vision question on Post-it or index cards. (10) In groups of three to five, discuss the cards written in last exercise. Each group will determine which card best describes the vision of the organization. Groups tweak ideas as necessary and develop one large card. (20) **Total Time: 40 minutes**	Facilitator Index cards for each participant Tape
3:55	**Lunch**	
4:45	**What is the impact the organization will help bring about?** *(continued)* Groups report out as everyone discusses commonalities, differences, and categories. (15) Facilitate a discussion with the large group to develop the vision from the statements on the cards. Select one statement that incorporates visions from all programs; this statement should be one the group is somewhat satisfied with. Type this vision onto a projected slide. Ask the group what else it needs. Type changes as group members speak. Typing the vision and modifying it as you proceed allows the group to see the vision as it is being formed. Pausing occasionally to allow the group to read and process the current statement will assist with consensus. (30) **Break** – Breaking here allows group members to individually process the discussion. (15) Continue the discussion and vision fine-tuning after break. If the members of the organization are struggling with divergent visions, facilitate a conversation to discover the issues and reconcile them. (45) Gain buy-in (as a last resort, prioritize with dots on the cards and the typed version). (15) Review the final vision with the participants to ensure there is buy-in. (10) Congratulate group on its collective vision. (5) Using the information from the conversations, write a two- or three-sentence statement that concisely states what your organization is and does, for whom, and how. This is your mission statement. (30) Develop next steps, deciding who will write the strategic goals and strategies. (30) **Total Time: 3 hours, 15 minutes**	Facilitator leads discussion Overhead projector Computer
8:00	**Wrap-up day: congratulations, and follow-up**	

Appendix B: Job Aids

Job Aid 1: Developing a Vision and a Mission

The vision is developed collaboratively with all programs in the organization represented. See Appendix A for an agenda template for a visioning meeting.

Fill in the organizational vision here:

The Vision

(the future the organization is working toward)

The mission is a description of the core purpose, focus, and target population. Using the information gathered in the preparation phase, complete the statement below to develop the mission.

The Mission

The mission of _____ is to provide _____

(organization's name)   (organization's products, tools, or services)

for _____ to _____.

(target audience)   (outcome)

A completed example of this job aid is provided as part of the case study in Appendix C.

Job Aid 2: Developing the Goals

Directions: Have each program fill in its designated column using the information gathered in the preparation phase of planning. Working with representatives from each program, discuss the niche and outcomes for each program. Group similar outcomes in rows across programs. What are the overarching themes that arise? For each row, develop an overarching goal statement that broadly describes all the outcomes in the row. Enter the new goal into the Overarching Synthesis column. Strategic plans can have several goals, typically three to five. Objectives for reaching those goals may also become apparent during the conversation.

Program→	Program 1	Program 2	Program 3	Overarching Synthesis
Audience				Synthesis of program audiences
Niche				Synthesis of program niches
Outcome				GOAL 1: Overarching goal derived from like outcomes
Outcome				GOAL 2: Overarching goal derived from like outcomes
Outcome				GOAL 3: Overarching goal derived from like outcomes

A completed example of this job aid is provided as part of the case study in Appendix C.

Job Aid 3: Writing SMART Objectives

Well-written objectives clearly define how organizations intend to achieve project or program outcomes. This job aid will help in writing a SMART objective for an outcome.

SMART objectives contain the following characteristics:

Specific – Use specific verbs that describe observable changes in the outcome as a result of the project. The chart below suggests specific verbs.

Measurable – Add a numerical target to the objective—something that can be counted.

Audience- or issue-directed – Focus the objective on changes that will occur within the audience, or to the issue being addressed.

Realistic and ambitious – What is the plausible change within the time frame? Use the target population assessment and the organization's SWOT (strengths, weaknesses, opportunities, and threats) analysis to ensure that the objective is attainable yet challenging.

Time-bound – Set a time limit for achieving the objective.

Action Verbs for Writing Objectives in the Cognitive Domain

Increasing Levels of Knowledge, Skill, or Ability →	Know	Comprehend	Apply	Analyze	Evaluate	Create
Use action verbs when writing objectives, because they are observable and measureable	Define	Restate	Translate	Distinguish	Judge	Compose
	Memorize	Discuss	Interpret	Analyze	Appraise	Plan
	Repeat	Describe	Apply	Differentiate	Evaluate	Propose
	Record	Recognize	Employ	Appraise	Rate	Design
	List	Explain	Use	Calculate	Compare	Formulate
	Recall	Express	Demonstrate	Experiment	Value	Arrange
	Name	Identify	Dramatize	Test	Revise	Assemble
	Restate	Locate	Practice	Compare	Score	Collect
		Report	Illustrate	Contrast	Select	Construct
		Review	Operate	Criticize	Choose	Create
		Tell	Schedule	Diagram	Assess	Set Up
			Shop	Inspect	Estimate	Organize
			Sketch	Debate	Measure	Manage
				Inventory		Prepare
				Question		
				Relate		
				Solve		
				Examine		

Using a goal developed with job aid 2, answer the questions on the next page and then transfer the answers to the statement on page 21.

❶ Specific_____.

What action or change needs to take place to achieve the outcome? Use the cognitive domain verbs to describe the desired change. (In the audience-directed example in Appendix C, the audience is being taught to describe research results. Words from the Comprehend column, such as "describe," "discuss," "recognize," or "explain," are used.)

❷Measurable_____.

What can be counted that will assist with measuring the change? Use numbers or percentages when possible. (In the audience-directed example in Appendix C, the number of participants that will succeed based on the information from the assessment, 90 percent, is used.) If nothing can be counted, use a proxy measure for the desired change. (In the issue-directed example, the emergent native species are the proxy for the invasive species: by December, emergent native species will cover 50 percent of the treated area.)

❸ Audience or Issue_____.

Who is the audience or what is the issue you are trying to affect? Use the name of the audience or describe the issue. (In the audience-directed example in Appendix C, the audience that is learning to describe research results is the outreach staff; in the issue-directed example, the issue is invasive species.)

❹ Realistic and Ambitious_____.

What is the plausible change to the issue or the audience that can be expected in the time frame, based on the assessment of the target population, the organization's niche from the SWOT analysis, and other baseline information? (In the audience-directed example in Appendix C, based on the skill level of the outreach staff and the data to be analyzed, it is plausible that participants will be able to describe research results after they have attended the training.)

❺Time-bound_____.

When is the change expected, based on knowledge of the current state? (In the audience-directed example in Appendix C, if the outreach staff attends a training to learn how to describe research data, it is plausible that participants will be able to demonstrate their knowledge at the conclusion of the training, which will be at the end of September.)

Insert answers from the questions on the previous page into the statement below to create the SMART objective:

Write a goal from job aid 2 here:

Using the SMART formula found on the "Writing SMART Objectives" job aid, write two to five objectives for this goal:

By _____,_____ of _____will be able to_____.

     Time-bound   Measurable Change in the Audience   Specific Action Realistic

By _____,_____ of _____will be able to_____.

     Time-bound   Measurable Change in the Audience   Specific Action Realistic

Write another goal from job aid 2 here:

Using the SMART formula found on the "Writing SMART Objectives" job aid, write two to five objectives for this goal:

By _____,_____ of _____will be able to_____.

     Time-bound   Measurable Change in the Audience   Specific Action Realistic

By _____,_____ of _____will be able to_____.

     Time-bound   Measurable Change in the Audience   Specific Action Realistic

Continue to write objectives until there are two to five for each goal. Be sure that all the work performed by every program under the goal is captured.

A completed example of this job aid is provided as part of the case study in Appendix C.

Job Aid 4: Developing Strategies

Write down a goal and the first objective. The preparation phase generated new and current approaches that will inform the strategies. Brainstorm with representatives from each program on the activities or outputs developed that help achieve this objective. Discuss current and new approaches the program proposed during the preparation phase. List those strategies here.

Check to ensure there are no strategy gaps by using the "if-then" test: "if all strategies are accomplished, (then) will the objective be met?" Modify the strategies or the objectives to align them. Some strategies may help with more than one objective.

Goal 1

    Objective 1.1

        Strategies:

           1.

           2.

           3.

           4.

    Objective 1.2

        Strategies:

           1.

           2.

           3.

           4.

Continue with this format for all the goals and objectives.

A completed example of this job aid is provided as part of the case study in Appendix C.

Job Aid 5: Strategic Plan Template

Vision

A description of what an organization would like to achieve or accomplish. The vision is intended to guide current and future direction.

Mission

Description of an organization's core purpose, focus, and target population. A mission is the cause, and the vision is the effect.

Goal 1: The result or achievement toward which effort is directed. The goal is broader and more general than an objective or an outcome. It is larger than the program and may result from the cumulative effect of many programs' outcomes.

> **Objective 1.1:** Establish the standards of achievement in terms of a proportionate improvement in the existing condition. Objectives are SMART (specific, measurable, audience- or issue-directed, realistic and ambitious, and time-bound).
>
> > **Strategies:** The activities and outputs designed to achieve objectives. Reviewing a program's new and current approaches will inform the strategies.
> >
> > 1.
> >
> > 2.
> >
> > 3.

A completed example of this job aid is provided as part of the case study in Appendix C.

Appendix C: Case Study

The fictional examples presented here illustrate how the pre–strategic planning process discussed in this publication works for place-based organizations, organizations responsible for protecting coastal resources and communities. In these examples, the organization is a preserve that receives support from a local university and partners with a nongovernmental organization, referred to as the conservancy, to conduct projects. The organization is composed of three programs: education and outreach, research, and stewardship.

1. Education and Outreach

The education and outreach program provides science-based learning opportunities to promote the understanding of the organization, its resources, and its relationships to the greater environment. The program works closely with schools in the area and conducts regular field trips for the students. Trainings and interpretation are developed and offered throughout the year on a variety of topics for visitors, K-12 educators, volunteers, and other community organizations.

2. Research

The research program promotes the use of the organization as a living laboratory for students, staff members, academic professionals, and visiting scientists. Research performed on site aligns with long-term goals of protecting the resources through monitoring, investigative studies, and comparative studies over a wide range of subject areas.

3. Stewardship

The stewardship program works to provide long-term protection of the resources by coordinating volunteer activities and cooperating with community stakeholders to implement management plans. The stewardship or volunteer coordinator can coordinate and guide others in addressing a range of activities, from habitat restoration and biological monitoring to recreational-use management.

Case Study Job Aid 1: Developing a Vision and a Mission

The vision is developed collaboratively with all programs in the organization represented. The first workbook of this strategic planning series, *Preparing to Write Your Strategic Plan*, describes how to collect fundamental information from each program—information that will be presented at the visioning meeting. See Appendix A of this workbook for a proposed process agenda for the visioning meeting.

Fill in the joint organizational vision here:

The Vision

The habitats within Conservancy Preserve are healthy, understood, and well managed.

(the future the organization is working toward)

The mission is a description of the core purpose, focus, and target population. Using the information gathered in the preparation phase, complete the statement below to develop the mission.

The Mission

The mission of Conservancy Preserve is to provide research, education, and stewardship opportunities for scientists, teachers, students, and neighbors, which foster the desire to protect coastal resources.

The mission of Conservancy Preserve is to provide research, education, and stewardship opportunities

(organization's name)   (organization's products, tools, or services)

for scientists, teachers, students, and neighbors, which foster the desire to protect coastal resources.

(target audience)   (outcome)

See Appendix B for job aid templates.

Case Study Job Aid 2: Developing the Goals

Program→	Education and Outreach	Research	Stewardship	Overarching Synthesis
Audience	K-12 teachers Volunteers Visitors	Students Academic professionals Visiting scientists	Volunteers Community stakeholders Visitors	Visitors Volunteers Community stakeholders Teachers Academic professionals Visiting scientists Students
Niche	Building literacy with local stakeholders using hands-on activities	Facilitating uses for the living laboratory	Managing the living laboratory	Community stakeholders have opportunities to learn about and interact with the living laboratory.
Outcome	Neighbors visit, understand, and value the preserve.	A broad understanding of how to manage similar habitat for long-term sustainability and health is developed.	Volunteers and community stakeholders are implementing the preserve management plan.	GOAL I: Community stakeholders understand and appreciate the natural environment of the preserve and volunteer to sustain it.
Outcome	Volunteers are trained to assist with research and monitoring.	Academic professionals, students, and staff members use the natural resources at the preserve as a living laboratory.	Ongoing biological monitoring is coordinated and conducted by volunteers.	GOAL II: Visiting scientists, students, and researchers work to increase the understanding of coastal ecosystems through scientific research.
Outcome	Volunteers are trained to assist with stewardship.	Monitoring for long-term trends is in place.	Restoration projects are completed by volunteers.	GOAL III: Volunteer stewards develop and implement restoration projects and monitor the results.

See Appendix B for job aid templates.

Case Study Job Aid 3: Developing SMART Objectives

Enter the goals developed on job aid 2.

Using the SMART formula found on the "Writing SMART Objectives" job aid, write two to five objectives for this goal:

Goal 1: Community stakeholders understand and appreciate the natural environment of the preserve and volunteer to sustain it.

The preserve will design, implement, and support three quality science-based education Programs (**Measureable**) that promote stewardship of coastal environments through understanding and appreciation of ecological systems and processes (**Specific**) for the community stakeholders that wish to volunteer (**Audience**) for the preserve by the conclusion of this plan (**Time-bound**).

Continue to write objectives until there are two to five for each goal.

See Appendix B for job aid templates.

Case Study Job Aid 4: Developing Strategies

Write down the goal, and the first objective. Brainstorm with representatives from each program on the activities or outputs developed that help achieve this objective. List those strategies here. Check to ensure there are no strategy gaps by using the "if-then" test: "if all the strategies are accomplished, (then) will the objective be met?" Modify the strategies or the objectives to align them.

Goal 1: Community stakeholders understand and appreciate the natural environment of the preserve and volunteer to sustain it.

> **Objective 1.1:** The preserve will design, implement, and support three quality science-based education programs that promote stewardship of coastal environments through understanding and appreciation of ecological systems and processes for the community stakeholders that wish to volunteer for the preserve by the conclusion of this plan.
>
> > **Strategies:**
> >
> > 1. Develop two public programs suitable for all age levels.
> >
> > 2. Education, stewardship, and research programs will coordinate to design and conduct workshops to prepare citizen and student monitoring volunteers to be able to
> >
> >   a. measure and monitor water quality
> >
> >   b. conduct salt marsh restoration
> >
> >   c. remove invasive species
> >
> >   d. monitor endangered species

See Appendix B for job aid templates.

Case Study Job Aid 5: Excerpts from the Conservancy Preserve Strategic Plan (the first two goals)

Vision

The habitats within Conservancy Preserve are healthy, understood, and well managed.

Mission

The mission of Conservancy Preserve is to provide research, education, and stewardship opportunities for scientists, teachers, students, and neighbors, which foster the desire to protect coastal resources.

Goals

GOAL 1: Community stakeholders understand and appreciate the natural environment of the preserve and volunteer to sustain it.

> **Objective 1.1:** The preserve will design, implement, and support at least three quality science-based education programs that promote stewardship of coastal environments through understanding and appreciation of ecological systems and processes for the community stakeholders that wish to volunteer for the preserve by the conclusion of this plan.

> > **Strategies:**
> >
> > 1. Develop two public programs suitable for all age levels.
> >
> > 2. Education, stewardship, and research programs will coordinate to design and conduct workshops to prepare citizen and student monitoring volunteers to be able to
> >
> >   a. measure and monitor water quality
> >
> >   b. conduct salt marsh restoration
> >
> >   c. remove invasive species
> >
> >   d. monitor endangered species

Objective 1.2: Within three years, the preserve will attract, nurture, and retain a dynamic cadre of 40 volunteers diverse in age, interests, and talents who augment all aspects of our programs.

Strategies:

1. Recruit and retain a volunteer base to help accomplish program goals and objectives.

2. Create a positive, open, and inclusive environment where all volunteers are encouraged to participate.

3. Facilitate opportunities for volunteers to gain knowledge of coastal ecology and other subject areas needed to augment programs and operations.

4. Ensure that volunteers feel valued and appreciated.

GOAL 2: Scientists, students, and researchers have access to a site and conduct scientific research that increases the understanding of coastal ecosystems.

Objective 2.1: Two research projects that investigate coastal food webs and habitats, their underlying physical and biological processes, and their response to natural changes and human activities will be initiated on the preserve before this plan expires in three years.

Strategies:

1. Provide grant funding for fellowships to investigate the ecology of estuarine and coastal habitats and food webs.

2. Research staff members will complete a site profile to provide context for future scientific studies.

3. Outreach and stewardship staff members will develop materials and recruit research scientists to examine natural system responses to human activities.

Objective 2.2: By the end of next year, two visiting investigators will recognize the unique setting of the preserve and will partner with the preserve staff to conduct independent or collaborative research, adding to the body of knowledge of the preserve.

Strategies:

1. Train and mentor undergraduates, graduate students, and citizen volunteers.

2. Support visiting researchers by providing access to facilities, field sites, staff members, and interns.

3. Cultivate programmatic affiliations with academic institutions, and collaborate with institutions on specific research projects.

4. Share information, personnel, equipment, and facilities with partners to facilitate collaborative research.

See Appendix B for job aid templates.

Appendix D: Implementation Plan Templates

Implementation Plan Template 1

Goal 1:	Performance Measures of Effectiveness:		
Objectives	**Strategies to Meet Objectives**	**Staff/Partnership Member(s) Responsible**	**Completion Date** *(month and year)*

Implementation Plan Template 2

Goal:

Objective:

Strategy:

Performance Measures:

Activity/Output *What will be done or produced?*	Responsibilities *Who will do it?*	Timeline *By when? (day and month)*
Step 1:		
Step 2:		
Step 3:		
Step 4:		
Step 5:		

Evaluation Process: *(How will you determine that your objective has been reached?)*

NOAA Coastal Services Center
LINKING PEOPLE, INFORMATION, AND TECHNOLOGY

2234 South Hobson Avenue
Charleston, SC 29405-2413
www.csc.noaa.gov