



## 2. Vision Statement

Combine the elements into a draft vision statement. This is a draft. You will likely rework it. Make sure you

- Paint a picture. Help others see how the future will be different.
- Convey hope. Make it big and inspiring, even unreasonable.

Record the draft vision statement on the planning template

## 3. Challenges we face

On the template list the top challenges in the external environment. You may face many more than three challenges. Pick just the most critical.

## 4. Opportunities we could exploit

List key opportunities exist in the external environment. Again, focus on the most essential.

## 5. Capacities we have

Of the *Six SDU Elements of an Effective Local* (see Local Assessment), where are you strongest?

## 6. Capacities we need to build

Of the *Six SDU Elements of an Effective Local*, which are the one or two most critical for your success?

## 7. Our campaign

In this section of the template, describe a possible campaign that would make a significant step towards the vision. The campaign will help address the current challenges, while taking advantage of the opportunities. Think about a campaign that will use the strengths you already have and will require you to build up capacities that need to be strengthened.

**Share your campaign ideas with the other folks from your state if time allows.**

## 8. Goals

For the *SDU Elements* you are focusing on, identify the goals you want to achieve. Remember that your goals here need to build your capacity while also advancing the campaign and reaching the milestones.

Here are some characteristics of **SMART** goals.

- **S- Specific:** concrete, clear- who what when where how
- **M-Measurable:** tangible, quantitative, behavioral
- **A-Attainable:** challenging, reasonable, given time, resources, and employee control
- **R- Relevant:** aligned with the priorities and the campaign
- **T- Timely:** results are measured in terms of deadlines, due dates, schedules and cycles

## 9. Our Strategy

This is the *overall approach* you will use to address the challenges while building up capacity. **The strategy answers the question, How will we win our campaign?** To decide on which approach to pursue, you'll need to make strategic choices about where you want to put your energy.

You might consider:

- What kind of strategy will yield the most leverage, given our internal capacity and our environment?
- What kind of strategy will help us build our leverage for this campaign and/or for the future?

Examples of strategy alternatives:

Use contract negotiations to build member and public involvement in our campaign

Combine a focus on building public media coverage and member education to advance our campaign.

Build relationships with one or more community-based groups who have concerns our campaign might help address.

## 10. Milestones

Here you describe the story of your successful campaign in 3-5 big steps. These are your markers of success along the way. For example, your big steps might be

1. Collect information from members and community. Understand their perspective. (by June)
2. Develop materials and programs that reflect the research. (by November)
3. Build public support through media and community partners. (by March)
4. Enough public officials support us to win. (by June)
5. Celebrate and plan next steps. (by August)

**Record your milestones along with anticipated dates across the top of the chart on the template.**

As you plan your goals and activities, you will know what short term success you are aiming for.

## 11. Action Steps

For each goal, identify the steps to reach the first milestone. These are the action or tasks you can assign. Brainstorm what needs to be done then order the tasks as a group.

In as much detail as possible, describe the specifics of the activities and tasks

- Who will be responsible for the activity or task;
- What they will do;
- When will it be completed by;
- Why are these actions being taken;
- Where will it be done;

The remainder of the chart provides space for you to note important considerations such as budget, other meetings and events.