



Annotated Bibliography of Online Resources on Strategic Planning **August 2007**

The following resources have been compiled by ACTEW to serve as a tool to support strategic directions planning in the Community Based Training Sector. While we have made every effort to keep the information accurate, it is possible that this bibliography may contain errors. If you notice errors or would like to contribute, please contact info@actew.org.

Thank you to the ACTEW membership for contributing valuable knowledge and resources that helped to compile this list.

Contents

1. Getting Started with your Strategic Plan: Helpful Models and Tips
2. Tools & Resources for Strategic Planning: Analysis, Data Collection, Implementation & Evaluation
3. Working With a Consultant

Getting Started with your Strategic Plan

Frequently Asked Question on Strategic Planning

http://www.allianceonline.org/FAQ/strategic_planning

Source: The Alliance for Nonprofit Management; American
Date: 2007

Description: This section of the Alliance for Nonprofit Management website includes detailed FAQs with a section on strategic planning that provides tools to guide planning: situational assessments (SWOT); competitive analysis (Macmillan Matrix); the development of an operating plan, strategic plan and implementation process; hiring a consultant; and conducting a retreat.

Five Good Ideas About...Strategic Planning

<http://www.maytree.com/MaytreeInitiatives/CapacityBuildingAndManagementTraining/FiveGoodIdeas2003-2004Sessions/FiveGoodIdeasSession4.htm>

Source: James Appleyard, Maytree Foundation; Canadian
Date: 2004

Description: The Maytree Foundation has included James Appleyard's 'Five Good Ideas About...Strategic Planning', in the Capacity Building and Management Training section of their website. This presentation is a good resource to introduce an organization to the fundamentals of strategic planning.

Strategic Planning In Smaller Nonprofit Organizations A Practical Guide for the Process

<http://www.wmich.edu/nonprofit/Guide/guide7.htm>

Source: Nonprofit Leadership and Administration Faculty, Western Michigan University; American
Date: 1999

Description: This guide is designed to support small not-for-profit organizations get started in the development of a strategic plan.

Tools & Resources for Strategic Planning: Analysis, Data Collection, Implementation & Evaluation

Community Engagement and Data Collection Methods

<http://www.health.state.mn.us/communityeng/needs/needs.html>

Source: The Minnesota Department of Health; American

Date: 2007

Description: The Community Engagement section of this website includes practical tools for supporting the process of collecting data from stake holders and clients. The tools cover guides and tips for organizing and conducting focus groups, key informant interviews, community forums and public hearings, surveys, and community resource inventories.

Logic Model, Evaluation & Data Collection

Interactive Tools & Workbooks

http://www.innonet.org/?section_id=64&content_id=182

Source: The Innovation Network; American

Date: 2007

Description: The Innovation Network provides free online interactive tools and resources that are designed to support your organization in the construction of: logic models; evaluation plans; organizational assessments; and survey development. In order to access the resources, participants are required to register (registration is free).

Online Evaluation Resource Library

<http://oerl.sri.com/home.html>

Source: Online Evaluation Resource Library; American

Date: 2007

The OERL has compiled an extensive collection of resources and tools designed to support program evaluation. The site provides a collection of plans, reports, instruments and professional development models from past and current evaluations. These models include the outlined processes for developing evaluations, questionnaires, interviews, and methods of data collection. The site offers many sample evaluations and programs for reference.

Tool Kits for Strategic Planning & Action Planning

http://www.civicus.org/new/civicus_toolkit_project.asp?c=036FB9.

Source: Civicus World Alliance for Citizenship Participation; American

Date: 2007

Description: Civicus offers very comprehensive and detailed toolkits, which are excellent resources for assisting in the development of a strategic plan and action plan. Each toolkit includes: questionnaires and exercises to guide the process; and models to and structure the development of an action plan and business plan. The toolkits set out steps to support the implementation of: evaluation systems; reports; and analysis models such as, SWOT, PEST, Stake Holder, GAP and the Local Framework analysis. Each toolkit is available in English, French and Spanish.

How to Write a Mission Statement

<http://www.tgci.com/magazine/How%20to%20Write%20a%20Mission%20Statement.pdf>

Source: Janel M. Radtke, The Grantsmanship Centre; American

Date: 2006

Description: In this article Janel M. Radtke discusses the purpose and role of a mission statement, such as important questions that staff should ask when defining their organization's mission statement. The author includes example mission statements from other organizations to guide the process.

Program Evaluation

<http://www.extension.psu.edu/evaluation/examples.html>

Source: Pennsylvania State University, College for Agricultural Sciences Cooperative, Extension & Outreach; American

Date: 2006

Description: This online collection provides material covering the many components of program evaluation. The subject areas include: developing survey questions; data collection methods; performing needs assessments; assessing program objectives; reporting results; research design models; sampling; working with special audiences and validity; and reliability issues. The site has over 80 tips sheets and 25 program evaluations.

Connecting Program Outcome Measurement to Community Impact

http://national.unitedway.org/files/pdf/outcomes/ConnectingPOM_toCI%20Final.pdf

Source: The United Way of America

Date: 2005

Description: The United Way of America has published a report on measuring program outcomes, as a tool to assess the community impact of a program. The report cites that using program outcomes measurement has clarified assumptions that had been previously in place with regard to the community outcome of program funding.

One Page Strategic Plan

www.gazelles.com

Source: Gazelles; American

Date: 2005

Description: Gazelles provides a resource section (free registration is required) in the 'my gazelle' area of the website. This section includes 'One Page Strategic Plan' template and detailed instruction manual for using the tool to guide the directions setting process for your organization.

Enhancing Program Performance with Logic Models

<http://www.uwex.edu/ces/lmcourse/#>

Source: The University of Wisconsin; American

Date: 2002

Description: The University of Wisconsin provides an online course introducing the elements of building and using logic models. The first of the two courses is an overall introduction of the components of a logic model and the role it has in planning and analysis. The course describes the logic model as a tool for identifying where you are and where you want to be in as an organization or within a program.

Environmental Scanning and Capacity Building Tools

<http://www.ambire.ca/resources.html#toolkit>

Source: Ambire Si; Canadian

Date: 2002

Description: Ambire Si has made available three tool kits that discuss techniques and models for implementing the following analysis and planning models: the Balanced Scorecard Evaluation, SWOT Analysis, and Scenario Planning. The tool kits look at the relevance of these techniques and walk through the steps of performing them within strategic directions planning.

Working with Consultants

Writing a Request for Proposal & Hiring a Consultant

<http://www.managementhelp.org/staffing/outsrcng/consult/consult.htm#anchor874515>

Source: Free Management Library; American

Date: 2007

Description: Free Management Library provides an extensive list of resources designed to support the operations of non-profit and small for-profit organizations. Included are links to several resources on the topic of strategic planning. Of these resources the section on preparing a request

for proposal and consulting contracts offer very useful tools and resources. The tools cover sample RFPs, proposal forms, and agreements.

Consulting Fees

<http://www.centreforsustainability.ca/resources/Results-of-Centre-for-Sustainability-2005-consulting-rate-survey.pdf>

Source: The Centre for Sustainability; Canadian

Date: 2005

Description: The Centre for Sustainability has posted the results of a survey that was conducted on the Canadian non-profit sector in 2005. The survey evaluates the average amount of service fees that were paid when contracting a consultant in the non-profit sector.