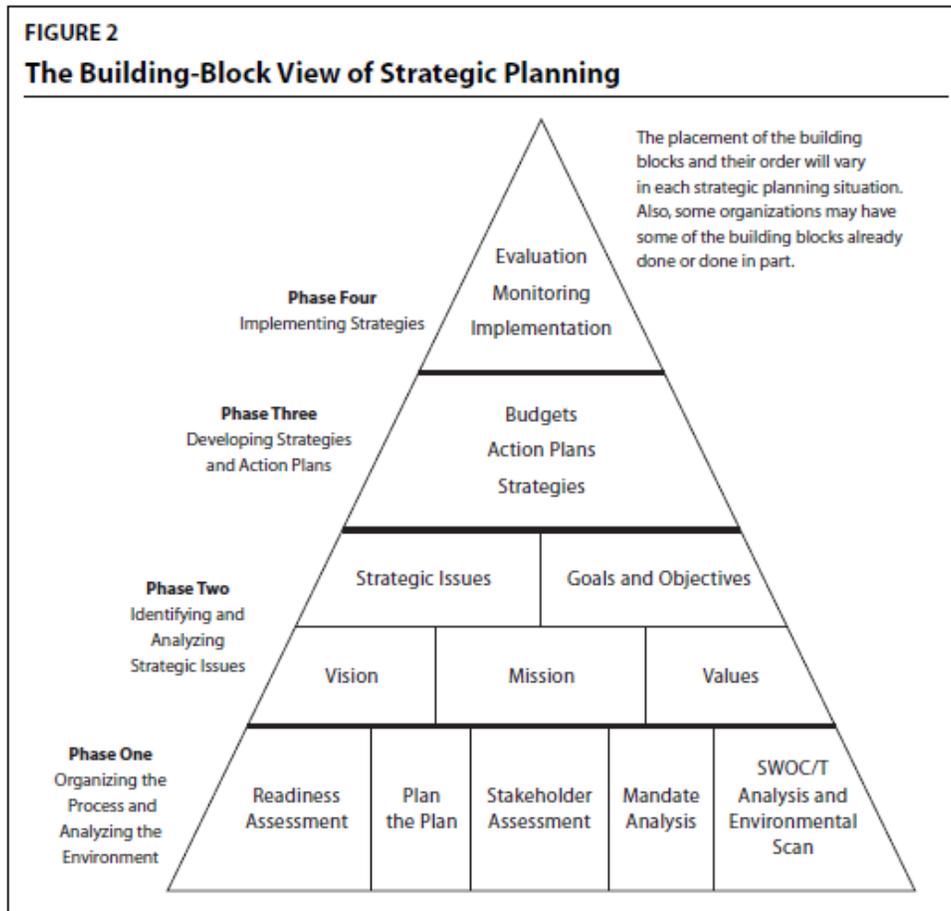


# Strategic Planning Retreat: SWAN board worksheets

## Introduction

Welcome!

We will be working on phase 1 of the building-block for our next strategic plan, “organizing the process and analyzing the environment,” which for SWAN means conducting a readiness assessment, identifying our stakeholders, and conducting an analysis of our strengths, weaknesses, opportunities, and challenges. This plan will contain the decisions and actions that will guide what SWAN is, what it does, and why we do it.



Source: Adapted from material developed by Farnum Alston and The Crescent Company, Bozeman, Montana.

## **Our identity, mission, and vision**

Identity: Defines how decisions are made.

Mission: Defines the problem in society the organization is trying to solve.

Vision Statement: What is the organization's solution?

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### **Identity**

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*SWAN provides resources and services to member libraries and the constituencies they serve and is governed as a representative democracy of elected Board members who represent the entire membership. Decision making is driven by the patron experience, patron rights, and security.*

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### **Mission**

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*SWAN seeks to improve patron ease of access to information, resources, and services through serving our member libraries. SWAN is dedicated to supporting our community of member libraries by sharing resources and technology.*

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### **Vision**

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*SWAN sets the standard of excellence for member and patron experience. We are the catalyst in creating and nurturing an ecosystem of ingenuity and collaboration. We engage in open dialogue with our membership and use purposeful communication in our community. We utilize careful planning of our key resources and are ready to seize opportunities as they arise.*

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## Agenda & Instructions for the retreat

**11:00 a.m. – 12 p.m.**

**Welcome!**

**Exercise 1: SWOT analysis – Strengths, Weaknesses, Opportunities, Challenges**

- A. Mission & vision:** work on this with your table mates & share with the group.
- B. Budget, HR, & IT:** work on this with your table mates & share with the group.
- C. Communications:** work on this with your table mates & share with the group.
- D. Leadership:** work on this with your table mates & share with the group.

**Lunch break 12 p.m. – 1 p.m.**

**1 p.m. – 3 p.m.**

Continue work on SWOT analysis

Exercise 2: What are the 5 priority issues that you think should be addressed first? Please rank them from 1 to 5, with 1 being the most important

Exercise 3: What do you think needs to stay the same or endure as a result of the strategic planning process, and what should change?

Exercise 4: Can you think of any key questions that we have not touched on?

Exercise 5: Do you have any other insights, ideas, or suggestions regarding strategic planning for this organization?

**Conclusion 3 p.m.**

## **Exercise 1: Strengths, weaknesses, opportunities, and threats (SWOT)**

### **Instructions**

A SWOT analysis is an exercise where a given topic is put through four lenses of the organization.

### **Strengths**

Internal attributes that give an advantage over others.

### **Weaknesses**

Internal factors that place the organization at a disadvantage.

### **Opportunities**

External factors that the organization can capitalize on.

### **Threats**

External challenges that could cause trouble.

The exercises for the SWOT are to gather as many as identified by the group. We will not rank them.

The goal of the exercise is to help SWAN during Phase Two of the strategic planning effort:

- To make informed decisions
- To identify strategic priorities
- To assess risks and opportunities
- To align resources with goals

### **Mission & Vision**

Please comment below on any significant organizational strengths, weaknesses, opportunities, and challenges in the areas of SWAN’s mission and vision.

Examples:

- We have too many mandates. (A weakness or a challenge, or both)
- Our current mission statement is an effective statement of organizational purpose. (A strength)

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Challenges</b>

**Budget, Human resources, and technology**

Please comment below on any significant organizational strengths, weaknesses, opportunities, or challenges in the areas of budget, human resources, and information technology.

Examples:

- We are short-handed in several key areas of operation (or certain skill sets, specific units, or particular substantive areas, and the like). (A weakness or a challenge, or both)
- How do we find the time to engage in an effective strategic planning effort? (A challenge)
- We have the technology we need to do our work. (A strength)
- We do not appear to have the resources we need to do a good job of strategic planning an especially of implementation. (A possible weakness or a challenge, or both)

Strengths	Weaknesses	Opportunities	Challenges

## **Communications**

Please comment on any significant organizational strengths, weaknesses, opportunities, or challenges in the area of communications.

*Examples:*

- Internal communications related to human resources are effective. (A strength)
- External communications with some important funders are fragmented and unfocused.
- (A weakness)
- There are technology-poor areas in our organization. (A challenge)

<b>Strengths</b>	<b>Weaknesses</b>	<b>Opportunities</b>	<b>Challenges</b>

**Leadership, management, organization structure & culture**

Please comment on any significant organizational strengths, weaknesses, opportunities, or challenges in the areas of leadership, management, organization, and culture.

Examples:

- The organization’s top leaders are committed to strategic planning. (A strength)
- Middle management is not committed to strategic planning. (A weakness)
- Our organization’s formal structure is antiquated given our mission. (A challenge)
- We do not reward risk taking and indeed punish entrepreneurial behavior. (A weakness)

Strengths	Weaknesses	Opportunities	Challenges

**Exercise 2:** What are the 5 priority issues that you think should be addressed first? Please rank them from 1 to 5, with 1 being the most important

1.

2.

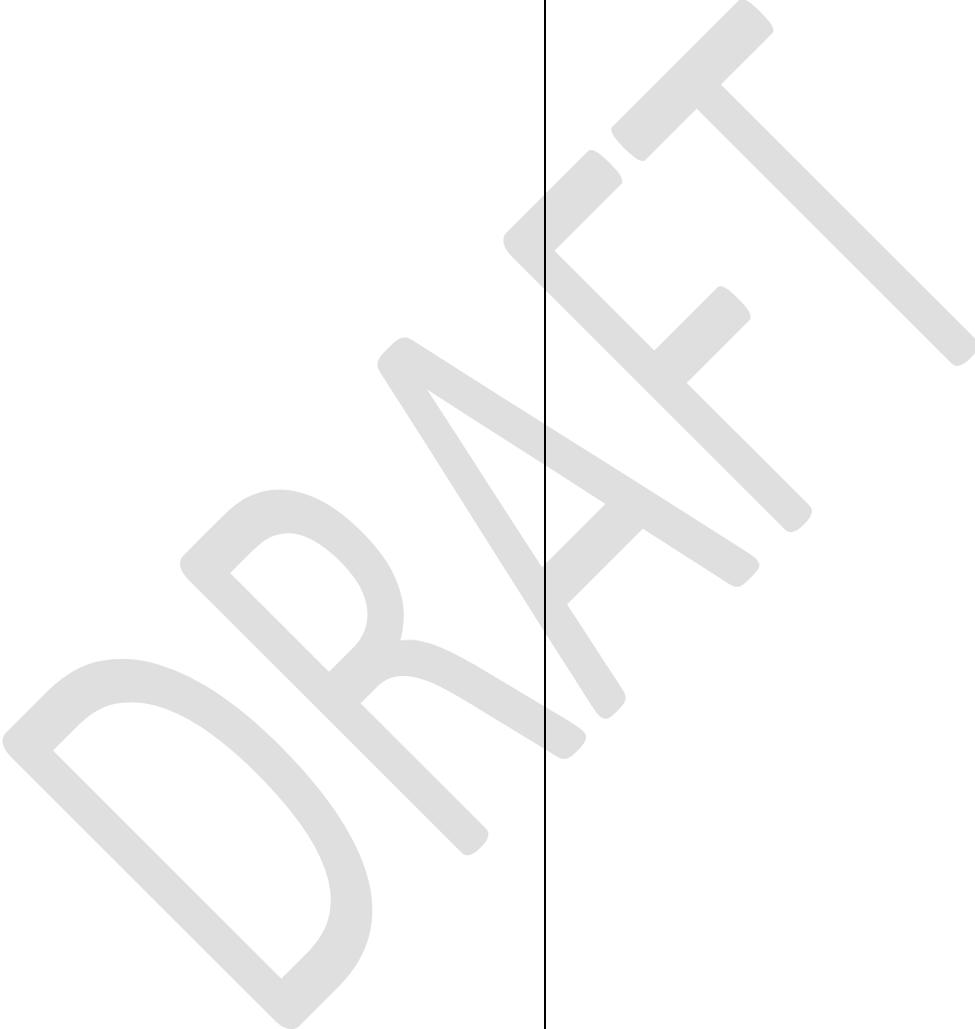
3.

4.

5.

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**Exercise 3:** What do you think needs to stay the same or endure as a result of the strategic planning process, and what should change?

Stay the same	Change
	

**Exercise 4:** Can you think of any key questions that we have not touched on?

**Exercise 5:** Do you have any other insights, ideas, or suggestions regarding strategic planning for this organization?

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