



# STRATEGIC PLANNING GUIDE

The purpose of a strategic plan for a Local is to break down seemingly complex projects into specific, measurable, assignable, realistic, and time-based tasks (SMART). Through your strategic plan, you can track your progress and effectiveness, delegate specific items to members, and assign a budget/cost to union activity.

## GETTING STARTED

First, we must determine where the information for the plan will come from. Begin by identifying areas of work to include in the plan:

- Committees outlined by your Constitution and By-Laws
- Additional committees
- Performance indicators (pay, benefits, membership engagement, PAC contributions, political endorsement wins, etc.)
- Areas identified by the SWOT analysis

## BUILDING THE PLAN

A strategic plan should have the following:

### MISSION STATEMENT

Develop a mission statement identifying the focus of your Local and its values.

- Example: “The mission of the **Washington State Council of Fire Fighters** is to enhance the lives of professional fire fighters and emergency medical workers through politics and education.”

### HONEST SWOT ANALYSIS

Identify strengths, weaknesses, opportunities, and threats (SWOT) by asking yourself the following questions:

- Where can we build relationships?
- Where are there easy wins?
- What can or will hurt the Local?
- What will make our work more difficult?

### IDENTIFY PRIORITIES

Now that you know where your Local is with your SWOT analysis, identify where you want to be. Make sure to include realistic timelines for when you will achieve these priorities.



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## LIST GOALS AND OBJECTIVES

Identify what your goals are and write down them down. These should follow the SMART test:

- **Specific:** Identify a specific result or outcome to be achieved.
- **Measurable:** Must be able to track progress and verify results.
- **Assignable:** Task must be assigned to a specific member or committee.
- **Realistic:** Task must be within the capacity of the Local to accomplish.
- **Time-Based:** Assign a date for when the result or outcome be achieved

## CREATE YOUR UNION CALENDAR

Creating a calendar of union activities will help your Local stay on task and appropriately plan for events. Here are a few suggestions for creating your ongoing calendar.

- Executive Board should meet and determine projects the Local will engage in for the remainder of the year.
- Write down known ongoing tasks for each month (union meetings, quarterly meeting with fire chief, monthly station visits, IAFF events, pertinent department events, etc.)
- Break down each project into identifiable tasks. Assign each task to a member and determine date for task to be completed. Place each time-based task into the calendar.
- Consider providing an overview of this calendar to your membership. Report on progress at monthly meetings and through internal communications as tasks are accomplished.

## TEMPLATE

### LOCAL MISSION STATEMENT

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### SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

| STRENGTHS – INTERNAL     | WEAKNESSES – INTERNAL |
|--------------------------|-----------------------|
|                          |                       |
| OPPORTUNITIES – EXTERNAL | THREATS – EXTERNAL    |
|                          |                       |



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## WHEN

## RESOURCES NEEDED

## DESIRED RESULT

[illegible]