



Camp Name	
Address	
Website	
Phone/Email	
I. GUIDING IDEAS	
Mission	
Vision	
Values	
II. ASSESSMENT	
Strengths	
Weaknesses	
Opportunities	
Threats	



Critical Strategic Issues

1.

2.

3.

4.

5.

III. STRATEGIC GOALS AND OBJECTIVES

GOAL 1

Obj 1

Obj 2

Obj 3

GOAL 2

Obj 1

Obj 2

Obj 3

GOAL 3

Obj 1

Obj 2

Obj 3

GOAL 4

Obj 1

Obj 2

Obj 3

GOAL 5

Obj 1

Obj 2

Obj 3

Success Metrics

Success Metrics

Success Metrics

Success Metrics

Success Metrics

IV. BUSINESS MODEL



WORKSHEET – GUIDING IDEAS REQUIRED PREWORK FOR TASK 1

Guiding ideas are high-level ideas that help you say “Yes!” to some things, and “No!” to others. Classic guiding ideas include mission, vision, values, beliefs, key definitions, theory of change, etc.

Instructions:

1. Search through the “organizational attic” for written versions of guiding ideas. Check your web site, brochures, founding documents, bylaws, grant applications, annual reports, etc.
2. Assemble your guiding ideas into a short summary of a page or two.
3. If you don’t have one or more of these, that is okay for now – just assemble what you have.
4. Share with planning team members in advance of Task 1.

Mission

Vision

Values

Beliefs



WORKSHEET – VALUES TASK 1

Organizational values are ideals and customs that govern the way you do what you do. Organizational values reflect the organization as it is, at its best.

Instructions:

1. Think of a high point in your experience of your organization.
2. What are the common themes across all the stories you hear?
3. Reflect: When we are at our best, the values we embody are...
4. Pick your top 3 to 5 organizational values.

High point story

Common themes across all stories

When we are at our best, the values we embody are...

Top 3 to 5 organizational values



WORKSHEET – MISSION TASK 2

An effective mission statement establishes direction, answering two fundamental questions – Whom do you serve? and What is your ultimate aim, or end result? An effective mission sometimes answers - What do you value? Avoid the temptation to use mission to answer the question - What do you do?

Instructions:

1. Reflect on your current mission.
2. Ask: Whom do you serve? Feel free to draw on your current mission or improve upon it.
3. Ask: What is your ultimate aim? Feel free to draw on your current mission or improve upon it.
4. Using your answers, draft a new mission statement.
5. Record your best proposed mission.

Current mission

Whom do you serve?

What is your ultimate aim, or end result?

Draft a new mission statement

Record your best proposed mission statement



WORKSHEET – GUIDING IDEAS - POST-TASK 1 AND 2

Guiding ideas are high-level ideas that help you say “Yes!” to some things, and “No!” to others. Classic guiding ideas include mission, vision, values, beliefs, key definitions, theory of change, etc.

Instructions:

1. Share the best proposed mission with key stakeholders. Listen and learn from their feedback.
2. Share the top 3 to 5 values with key stakeholders. Listen and learn from their feedback.

Best proposed Mission

Feedback on the draft Mission

3 to 5 Top Values

Feedback on 3 to 5 top values

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WORKSHEET – FACTS AT A GLANCE EXTRA CREDIT PREWORK FOR TASK 3

Facts at a glance convey a quick summary of your organization's size, scope, and impact to friends, and interested outsiders. Consider target audience, services, program statistics, size, finances, etc.

Instructions:

1. Search for key facts on your web site, in performance assessments, in annual reports, etc.
2. Compile your facts at a glance in one page. Use bullet points and, if appropriate, graphics.
3. Share with planning team members in advance of Task 3.

Facts at a glance



WORKSHEET – HISTORY EXTRA CREDIT PREWORK FOR TASK 3

An organization's history tells its story, informs its present, and shapes its future.

Instructions:

1. Document your organization's history – consider its founding, significant events, important accomplishments, key leaders, etc.
2. Draft your organizational history in a single page.
3. Share with planning team members in advance of Task 3.

History



WORKSHEET – COMMUNITY NEEDS EXTRA CREDIT PREWORK FOR TASK 3

Nonprofits exist to serve their communities and the people within them. A clear understanding of both community-wide needs and the specific needs of your target audience helps ensure that programs are well-designed and appropriately prioritized.

Instructions:

1. Describe the community or communities you serve using available data—such as demographics, needs assessments, and statements from grant applications—and identify the most pressing needs.
2. Define your primary beneficiary group(s) and outline their key needs.
3. Share with planning team members in advance of Task 3.

Community Needs

Needs of Target Audiences

WORKSHEET – COMPETITIVE POSITION *EXTRA CREDIT PREWORK FOR TASK 3*

Nonprofits must be increasingly aware of their competitive landscape—not only to differentiate themselves, but also to identify opportunities for collaboration.

Instructions:

1. Identify your organization's key competitors. Clarify where you compete and where collaboration may be possible.
2. Based on this review, define your competitive advantage.
3. Share with planning team members in advance of Task 3.

Competitors	Where We Compete	We Could Collaborate

Competitive Advantage



WORKSHEET – ASSESSMENT (SWOT) RECOMMENDED PREWORK FOR TASK 3

A SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis is a widely used framework for assessing an organization's internal capabilities and external environment at a specific point in time.

Instructions:

1. Engage internal stakeholders to assess the organization's key strengths and weaknesses, and identify those that are most significant. Also ask them to evaluate external opportunities and threats, highlighting the most important factors.
2. Engage external stakeholders, as time allows, to gain additional perspective.
3. Incorporate insights from other sources, such as performance data compared to peer and industry benchmarks, third-party assessments, and environmental scans of trends and best practices.
4. Summarize your assessment in one or two pages, in bullet point form.
5. Share with planning team members in advance of Task 3.

Strengths

Weaknesses

Opportunities

Threats



WORKSHEET – ASSESSMENT (SWOT) TASK 3

A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis is the classic framework for assessing an organization and its situation at a given point in time.

Instructions:

1. Brainstorm a list of organizational strengths. Select your Top 5.
2. Brainstorm a list of organizational weaknesses. Select your Top 5.
3. Brainstorm a list of organizational opportunities. Select your Top 5.
4. Brainstorm a list of organizational threats. Select your Top 5.

Strengths (internal)

Weaknesses (internal)

Opportunities (external)

Threats (external)



WORKSHEET – Optional ASSESSMENT (SWOT) – TASK 3

Leading a Board Discussion on SWOT prior to Task #3

A SWOT (Internal strengths and weaknesses; external opportunities and threats) analysis is the classic framework for assessing an organization and its situation at a given point in time.

Instructions:

1. Ask for 30 minutes at a Board Meeting to hold a brainstorming session.
2. For 2 minutes, discuss Camp GPS one–page strategic plan. Let Board members know that their input, combined with the inputs from other sources, will help inform our understanding of the Camp’s current condition and future opportunities.
3. Appoint a note taker who will capture the conversation, a facilitator who will ask the four questions below, and a timekeeper.
4. Ask each of the 4 questions, spending just 5 minutes on each.
5. Thank the Board for the time.

Strengths

“What do you see as our Camp’s strengths?”

Weaknesses

“Where can we become even stronger?”

Opportunities

“What emerging opportunities might we act on?”

Threats

“What external threats must we consider?”



WORKSHEET – Optional ASSESSMENT (SWOT) – TASK 3

Leading a Staff Meeting Discussion on SWOT prior to Task #3

A SWOT (Internal strengths and weaknesses; external opportunities and threats) analysis is the classic framework for assessing an organization and its situation at a given point in time.

Instructions:

1. Ask for 30 minutes at a Staff Meeting to hold a brainstorming session.
2. For 2 minutes, discuss Camp GPS one–page strategic plan. Let Staff members know that their input, combined with the inputs from other sources, will help inform our understanding of the Camp's current condition and future opportunities.
3. Appoint a note taker who will capture the conversation, a facilitator who will ask the four questions below, and a timekeeper.
4. Ask each of the 4 questions, spending just 5 minutes on each.
5. Thank the staff for the time.

Strengths

“What do you see as our Camp’s strengths?”

Weaknesses

“Where can we become even stronger?”

Opportunities

“What emerging opportunities might we act on?”

Threats

“What external threats must we consider?”



WORKSHEET – Optional ASSESSMENT (SWOT) – TASK 3

Leading a Phone/Zoom interview with a key stakeholder on SWOT prior to Task #3

A SWOT (Internal strengths and weaknesses; external opportunities and threats) analysis is the classic framework for assessing an organization and its situation at a given point in time.

Instructions:

1. Ask for a 30 minute conversation with a key donor or stakeholder to hold a brainstorming session.
2. For 2 minutes, discuss Camp GPS one–page strategic plan. Let them know that their input, combined with the inputs from other sources, will help inform our understanding of the Camp’s current condition and future opportunities.
3. Let them know you will be taking notes during this conversation.
4. Ask each of the 5 questions, spending just 5 minutes on each.
5. Thank the donor/stakeholder for the time. Share with them the plan for keeping them updated on the progress of the strategic planning process.

Introductions

“Tell me about your connection to our Camp.”

Strengths

“What do you see as our Camp’s strengths?”

Weaknesses

“Where can we become even stronger?”

Opportunities

“What emerging opportunities might we act on?”

Threats

“What external threats must we consider?”

Is there anything else we should keep in mind as we begin our strategic planning?

WORKSHEET – Optional ASSESSMENT (SWOT) – TASK 3

Leading a Focus Group on Zoom on SWOT prior to Task #3

A SWOT (Internal strengths and weaknesses; external opportunities and threats) analysis is the classic framework for assessing an organization and its situation at a given point in time.

Instructions:

Many camps engage alumni, parents, and current and former staff, who love the camp and may appreciate the invitation, to give input on planning the future of the camp.. An invitation to join a focus group is a great way to engage interested stakeholders and strengthen donor engagement.

Email an invitation to fill out a survey or attend a live “Campfire chat” zoom meeting to discuss the future of the camp. This can be sent to your general list or targeted to specific segments of the camp community.

- **Email invite.** Give people a choice of attending the zoom event or fill out a survey
- **3 leaders.** Have three people led the Zoom meeting. 1 person for zoom tech support and note taking. 1 person for monitoring the chat and timekeeper. 1 person to lead the conversation.
- **Timing.** Start on time and end on time. Limit the Campfire chat to 45 minutes.
- **Context.** Start with the Camp Director providing an update on the summer, some of the challenges, and the successes. Express excitement for strategic planning (optimism) and gratitude for everyone’s help. This should take about 10 minutes
- **Skip introductions.** Unless you have 6 or less people, skip the introductions. They take too long. Instead, have people update their zoom name.
- **4 questions.** Spend about 7 minutes on each question. Place all four questions in the chat, so participants can think about them.
- **Share screen.** You have the option of sharing your screen to visually share the notetaking during the meeting.
- **Thank.** Close the meeting on-time. Thank people for their time, wisdom, and concern for the organization. Offer to meet with anyone after this session if there is more they would like to share. Indicate when the results of planning will be shared with the community.
- **Stay focus.** Avoid problem solving at this meeting, even if “big” issues come up, even if people have ideas on how to solve a big issue. The leader of the meeting should guide the group to collect as many ideas for each question as possible and then move on, rather than spent time discussing one “big” issue.
- **Remember.** Your invitation to participate is as important as attendance. Low attendance does not necessarily indicate a problem.

Welcome

Leaders introduce themselves.

Camp Director gives Context.

Strengths

“What do you see as our Camp’s strengths?”

Weaknesses

“Where can we become even stronger?”

Opportunities

“What emerging opportunities might we act on?”

Threats

“What external threats must we consider?”

Optional – if there is time:

Is there anything else we should keep in mind as we begin our strategic planning?



WORKSHEET – ASSESSMENT (SWOT) POST-TASK 3

A SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis is the classic framework for assessing an organization and its situation at a given point in time.

Instructions:

*Share the top five strengths and weaknesses, and opportunities and threats, with key stakeholders.
Listen and learn from their feedback.*

Strengths	Feedback on top strengths
* * * * *	
Weaknesses	Feedback on top weaknesses
* * * * *	
Opportunities	Feedback on top opportunities
* * * * *	
Threats	Feedback on top threats
* * * * *	



WORKSHEET – ASSESSMENT (CRITICAL STRATEGIC ISSUES) TASK 4

Critical strategic issues express high-level, strategic concerns that cut across your entire SWOT analysis. They highlight key questions that the plan must address.

Instructions:

1. Brainstorm a list of critical strategic issues. Frame the issue with the prompt, “How can we...?”
2. Select your top five. Time permitting, select your top one of five.

Critical strategic issues

Top 5 critical strategic issues

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Top 1 of 5



WORKSHEET – ASSESSMENT (CRITICAL STRATEGIC ISSUES) POST-TASK 4

Critical strategic issues express high-level, strategic concerns that cut across your entire SWOT analysis. They highlight questions that the plan must address.

Instructions:

Share the top five critical strategic issues with key stakeholders. Listen and learn from their feedback.

Top 5 critical strategic issues	Feedback on the top 5 critical strategic issues
(Top 1 of 5, first) 1. 2. 3. 4. 5.	



WORKSHEET – VISION AND STRATEGIC GOALS RECOMMENDED PREWORK - TASK 5

Effective organizations articulate their preferred future. They define a high-level aspiration for what they hope to do or be in ten years. They also define tangible strategic goals – results, outcomes, and achievements - they aim to accomplish in the next three years that will move them towards their preferred future.

Instructions:

- 1. Engage stakeholders in envisioning a positive future – What is a high-level aspiration they would love to accomplish in ten years? What tangible results, outcomes, and achievements would they love to accomplish in the next three years?*
- 2. Summarize the most promising goals in one page, in bullet form.*
- 3. Share with planning team members in advance of Task 5.*

What high-level aspiration would they love to accomplish in ten years?

What tangible results, outcomes, and achievements would they love to accomplish in the next three years?



WORKSHEET – VISION AND STRATEGIC GOALS – TASK 5

Effective organizations articulate their preferred future. They define a high-level aspiration for what they hope to do or be in ten years. They also define tangible strategic goals – results, outcomes, and achievements - they aim to accomplish in the next three years.

Instructions:

- 1. Imagine a positive future. What is your highest and best aspiration for what your organization can do or be in ten years? What three results, outcomes, and achievements would you love to accomplish in three years?*
- 2. After discussion with your group, record your top aspiration in ten years. Record your top five goals for results you'd like to achieve in three years.*

What is your highest and best aspiration for what your organization can do or be in ten years?

What three results, outcomes, and achievements would you love to accomplish in three years?

1

2

3

Ten-year aspiration

Top five goals/results in three years

1

2

3

4

5



CAMP _____ PLAN PERIOD _____

MISSION Whom we serve and why	VISION Who we aspire to be	VALUES What we never compromise
STRATEGIC GOAL #1:		SUCCESS METRICS GOAL #1
Obj 1		
Obj 2		
Obj 3		
STRATEGIC GOAL #2:		SUCCESS METRICS GOAL #2
Obj 1		
Obj 2		
Obj 3		
STRATEGIC GOAL #3:		SUCCESS METRICS GOAL #3
Obj 1		
Obj 2		
Obj 3		
STRATEGIC GOAL #4:		SUCCESS METRICS GOAL #4
Obj 1		
Obj 2		
Obj 3		
STRATEGIC GOAL #5:		SUCCESS METRICS GOAL #5
Obj 1		
Obj 2		
Obj 3		



WORKSHEET – VISION AND STRATEGIC GOALS POST-TASK 5

Effective organizations articulate their preferred future. They define a high-level aspiration for what they hope to do or be in ten years. They also define tangible strategic goals – results, outcomes, and achievements - they aim to accomplish in the next three years.

Instructions:

1. Share the proposed vision with key stakeholders. Listen and learn from their feedback.
2. Share the top 3 to 5 strategic goals with key stakeholders. Listen and learn from their feedback.

Vision in ten years	Feedback on vision in ten years

Top five goals/results in three years	Feedback on top five goals/results in three years
1	
2	
3	
4	
5	



WORKSHEET – OBJECTIVES TASK 6

Objectives are the specific results that must be achieved in order to reach your strategic goals.

Instructions:

For each goal, identify the top three results you must achieve in order to reach the goal.

Goal

Brainstorm Possible Objectives/Results

Objectives/Results to Achieve Goal

1.

2.

3.



WORKSHEET – OBJECTIVES – POST-TASK 6

Objectives are the results that must be accomplished in order to achieve your strategic goals.

Instructions:

Share the proposed objectives with key stakeholders. Listen and learn from their feedback.

Goal

Objectives/Results to Achieve Goal

1.

2.

3.

Feedback on Objectives



WORKSHEET – BENCHMARKS EXTRA CREDIT PREWORK FOR TASK 7

Metrics are the indicators you use to measure success. Benchmarks are the performance standards for those metrics, often defined by top performers in your field.

Instructions:

1. Identify best-in-class organizations that set the standard for performance in your industry. Identify the metrics they use and the performance standards they meet.
2. Summarize the most compelling data in one page.
3. Share with planning team members in advance of Task 7.

Best-in-class Organizations	Success Metrics	Performance Benchmark



WORKSHEET – PERFORMANCE DATA EXTRA CREDIT PREWORK FOR TASK 7

Metrics are the indicators of your success. Once you have identified metrics, you can track historical and current performance. That information, along with industry benchmarks, helps you set future performance targets.

Instructions:

1. Identify the metrics you track. Document historic and current performance.
2. Summarize the data in one page.
3. Share with planning team members in advance of Task 7.

Metrics we track	Historical Performance	Current Performance



WORKSHEET – SUCCESS METRICS *RECOMMENDED PREWORK FOR TASK 7*

Objectives are the specific results that must be achieved in order to reach your strategic goals.
Metrics are the indicators you use to measure success.

Instructions:

- 1. Ask stakeholders: “When we are successful, how will we know?” or “By what indicators can we best measure our impact and success?”*
- 3. Summarize the most promising set of metrics in one page, in bullet form.*
- 4. Share with planning team members in advance of Task 7.*

Possible metrics

Most promising metrics



WORKSHEET – SUCCESS METRICS TASK 7

Metrics are the indicators of your success.

Instructions:

For each goal, identify the indicators you will use to measure and demonstrate your success.

Goal

Brainstorm Possible Success Metrics

Top Success Metrics



WORKSHEET – METRICS – POST-TASK 7

Metrics are the indicators of your success.

Instructions:

Share the proposed metrics with key stakeholders. Listen and learn from their feedback.

Goal

Success Metrics

Feedback on Success Metrics



WORKSHEET – MISSION REVENUES MATRIX EXTRA CREDIT PREWORK FOR TASK 8

A business model statement describes how an organization's program strategy aligns with its financial strategy to ensure long-term sustainability.

Instructions:

1. Review every program and initiative of your organization and determine whether it has a high or low correlation with your mission. Map each accordingly on the matrix.
2. Review every program and initiative of your organization and determine whether it generates a high or low contribution to revenues. Map each accordingly on the matrix.
3. Summarize the insights in one page, in matrix form, and reflect on the implications.
4. Share with planning team members in advance of Task 8.

MATRIX	Low contribution to revenues	High contribution to revenues
High correlation with mission	May be the "soul of the agency," but they require subsidy.	Can sustain the agency, and subsidize needs in the upper left quadrant.
Low correlation with mission	Can drain the agency, and they require subsidy.	Can distract the agency, but subsidize needs in the upper left quadrant.



WORKSHEET – ALTERNATIVE MODELS EXTRA CREDIT PREWORK FOR SESSION 8

A business model statement describes how an organization's program strategy aligns with its financial strategy to ensure long-term sustainability.

Instructions:

1. Summarize why your current business model needs to change to make it more sustainable.
2. Map out 2 or 3 alternative business models that could provide greater sustainability.
3. Share with planning team members in advance of Session 4.

**Why current
business model
needs to change
to be more
sustainable**

**1. Alternative
business model**

**2. Alternative
business model**

**3. Alternative
business model**



WORKSHEET – FUNDING SOURCES RECOMMENDED PREWORK FOR TASK 8

A business model statement describes how an organization's program strategy aligns with its financial strategy to ensure long-term sustainability.

Instructions:

1. List every source of funding, its amount, and its percentage contribution to the total budget.
2. Share with planning team members in advance of Task 8.

FUNDING SOURCE	FUNDING AMOUNT	FUNDING PERCENTAGE
	\$	%
	\$	%
	\$	%
	\$	%
	\$	%
	\$	%
	\$	%
	\$	%
TOTAL	\$	100%



WORKSHEET – BUSINESS MODEL TASK 8

A business model statement describes how an organization's program strategy aligns with its financial strategy to ensure long-term sustainability.

Instructions:

1. Discuss: *What is our organization's current business model?*
2. Discuss: *Is it sustainable? If not, why not? When and how must it change?*
3. Draft a new business model statement that links your financial strategy with your program strategy in a sustainable way.
4. Record the best proposed business model statement.

What is our organization's current business model?

Is it sustainable? If not, why not? When and how must it change?

Draft a new business model statement that links your financial strategy with your program strategy in a sustainable way.

Record your best proposed business model statement.



WORKSHEET – BUSINESS MODEL – POST-TASK 8

A business model statement explains how an organization's program strategy fits with its financial strategy in a way that creates a financially sustainable organization.

Instructions:

Share the proposed business model with key stakeholders. Listen and learn from their feedback.

Our proposed business model statement

Feedback on our business model statement