Performance Excellence Program (PEP)
Category 1 – Strategic Planning

Strategic Planning in the Baldrige Performance Excellence Program (PEP) is about how the organization develops strategic objectives and action plans, implements them, changes them if circumstances require, and measures progress.

Items in BLUE are current areas of focus in the department

Overarching Areas of Focus:

- How does the organization establish a strategy to address its strategic challenges and leverage its strategic advantages and strategic opportunities?
- How does the organization make key work system decisions?
- How does the organization implement its strategic?
- How does are strategic objectives converted into action plans and how are those action plans developed?
- What is the organization's performance projections?

Strategic Development Process

- How do you conduct strategic planning?
- What are the key process stops?
- Who are the key participants?
- What are your short- and longer-term horizons?
- How does your strategic planning process address these planning horizons?
- How does your strategic planning process address the need for organizational agility and operational flexibility?
- How do you create an environment that supports innovation?
- How do you identify strategic opportunities?
- How do you decide which strategic opportunities are intelligent risks for pursuing?
- What are your strategic opportunities?
- How do you collect and analyze relevant data and develop information on these key elements as part of your strategic planning process?
- What are your key work systems?
- How do you make work system decisions?
- How do you decide which key processes will be accomplished by external suppliers and partners?
- How do those decisions consider your core competencies and the core competencies of potential suppliers and partners?
- How do you determine future organizational core competencies?
- What are your organization's key strategic objectives and your timetable for achieving them?
- What are your most important goals for these strategic objectives?

Strategy Implementation

- How do you implement your strategy?
- How you convert your strategic objectives into action plans?
- How do you develop your action plans?

- What are your key short- and longer-term action plans, and what is their relationship to your strategic objectives?
- How do you deploy your action plans throughout the organization to your workforce and to key suppliers, partners, and collaborators, as appropriate, to ensure that you achieve your key strategic objectives?
- How do you ensure that you can sustain the key outcomes of your action plans?
- How do you ensure that financial and other resources are available to support the achievement of your action plans while you meet current obligations? How do you allocate these resources to support the plans?
- How do you manage the financial and other risks associated with the plans to ensure your financial viability?
- What are your key workforce plans to support your short- and longer-term strategic objectives and action plans? How do the plans address potential impacts on your workforce members and any potential changes in workforce capability and capacity needs?
- What key performance measures or indicators do you use to track the achievement and effectiveness of your action plans?
- How do you ensure that your overall action plan measurement system reinforces organizational alignment?
- How do you establish and implement modified action plans if circumstances require a shift in plans and rapid execution of new plans?

Performance Projections

- What are your performance projections for your short- and your longer-term planning horizons?
- How does your projected performance on these measures or indicators compare with the projected performance of your competitors or comparable organizations and with key benchmarks, as appropriate?
- If there are gaps in performance against your competitors or comparable organizations, how will you address them?