

**[NAME OF YOUR ORGANIZATION!!]
STRATEGIC PLAN**

For the Period
[insert dates!!]

Approved by the Board of Directors
[insert date that plan was authorized by board by directors (in the case of a corporation!!)]

TABLE OF CONTENTS

Executive Summary

Board Authorization of Strategic Plan

Organizational Description

Mission, Vision and Values

Goals and Strategies

Annexes

- A Action Planning (objectives, responsibilities and time lines)
- B Description of Strategic Planning Process Used
- C Strategic Analysis Data (External Analysis, Internal Analysis & List of Issues)
- D Goals for Board Committees and Chief Executive Officer
- E Staffing Plans
- F Operating Budgets
- G Financial Reports (Budgets, Statements, etc.)
- H Monitoring and Evaluation of Plan (Criteria, Responsibilities and Findings)
- I Communicating the Plan

Board Authorization of Strategic Plan

(Authorization indicates board members' approval of the strategic direction and action plans described in this strategic plan document.)

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Name of Board Member: _____ Date Signed: _____

Organizational Description

This section should include information that will be informative, particularly to readers from outside of the organization:

- Brief overview of the history of organization.
- Description of major products and services.
- Overview of major accomplishments and other highlights during history of organization.

Mission Statement

The mission statement is a concise description of the purpose of the organization. It answers the question: Why does our organization exist? When answering this question, include the nature of your programs and services, and the various groups of stakeholders that benefit from the programs and services. The mission statement should provide direction and focus to your plans and operations. Post your mission statement widely.

Vision Statement

The vision statement is an inspirational, compelling answer to the question: What do you ultimately hope for your organization and stakeholders? Ideally, it should be written in a compelling, inspirational fashion. Post your vision statement widely.

Values Statements

Values statements depict the priorities in how the organization carries out activities with stakeholders. The board and chief executive should regularly reference the values statements to provide guidance to the nature of how the organization should operate.

Goals and Strategies

Goals are identified from having taken a wide look around the outside of the organization (an external analysis) and a careful look inside the organization (an internal analysis), and then identifying what are the most important issues to address.

Appendix C includes information that will help you organize this analysis.

When you develop your goals, be sure they are "SMARTER", that is, specific, measurable, acceptable to the people working to achieve the goals, realistic, timely, extending the capabilities of those working to achieve the goals and rewarding to them. Don't worry so much about having perfectly written goals in the beginning. They are likely to shift and change as you move through the various steps of the planning process.

You Will Likely Have Organization-Wide and Product/Service-Specific Goals

You will probably have organization-wide goals, for example, goals related to building and running your organization—board development, staffing, purchasing a new building, etc.

You will also likely have goals that relate directly to the programs and services you offer your members and program beneficiaries.

Below, write down the strategic goals that must be achieved in order to address the issues listed in Appendix C. Think about what must be achieved in order to address the issues. Consider goals over the term of your strategic plan, but look very closely at the next year especially.

Write Down Forward-Looking Goals

Next, write down more forward-looking goals. If you are developing a new organization, then you'll probably have goals to build a board, create a strategic plan, conduct a market analysis structure your programs, hire staff, etc.

Next, Associate Strategies with Each Goal

Next, under each goal, write down the major approaches (or strategies) that must be used to achieve each goal. Consider strategies over the term of the strategic plan, but especially over the next year.

Finally, consider whether your goals and strategies align with your organization's mission, vision and values.

Does each goal and its associated strategies really contribute toward the mission and vision of the organization? Will the goals be reached by using strategies that are closely aligned with the values of the organization? If not, then very carefully reconsider whether you want to pursue those goals and associated strategies.

(SMARTER) Goals and Strategies
(Make copies of this page as needed.)

Goal # 1

Strategy # 1.1

Strategy # 1.2

Strategy # 1.3

Strategy # 1.4

Appendix A — Action Planning (Objectives, Responsibilities and Timelines)

In this section, write down action plans, particularly for the next year. Action plans specify how the strategic goals and strategies will be carried out. Action plans often include various objectives to be reached while achieving each goal, who is responsible for achieving each objective and by when.

Action Planning (Who is going to do what and by when)

(Make copies of this page as needed.)

Goal # 1 (Write them to be "SMARTER")

Strategy # 1.1

Objectives for Strategy 1.1

Planned Completion Date:

Responsible Person(s):

Appendix B — Description of Strategic Planning Process Used

This appendix might include, for example:

- Description of how the strategic plan document was developed.
- Who was involved in the planning.
- Any major problems and lessons learned during the planning process.

Appendix C – Strategic Analysis Data: Internal Analysis

Write down the major strengths and weaknesses of your organization. Consider the quality of operations of the board, programs, staffing, finances, facilities, marketing, etc.

In this section, include your organization's Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis.

From our internal analysis (our SWOT analysis), we identified the following factors:

Strengths of the organization: _____

Weaknesses of the organization: : _____

Opportunities for the organization: _____

Threats to the organization: _____

Appendix C — Strategic Analysis Data: Strategic Issues

New organizations and businesses, in particular, are often better off first looking at the major obstacles or issues that it faces, and then identifying the more forward-looking and developmental goals to be accomplished.

For example, current issues might be that program goals are not being met, there is high employee turnover, etc.

Developmental goals for a new organization might include, for example, building a board, creating a strategic plan, conducting a market analysis, hiring staff, etc.

To identify the key issues identified from your strategic analyses, consider the following guidelines:

- a) Considering the effects of weaknesses and threats that you identified, what are the major issues that you see? List as many as you can. Consider issues over the term of your strategic plan, but look very closely at the next year especially. Many organizations have stumbled badly because they ended up "falling over their feet" while being focused much too far down the road.
- b) Consider each of the issues. Ask whether it's "important" or "urgent." Often, issues seem very important when they're only urgent. For example, changing a flat tire is an urgent issue—but you'd never put "changing a tire" in your strategic plan. Attend only to the important issues and not the urgent ones.
- c) Deal with issues that you can do something about. Issues that are too narrow do not warrant planning and issues that are too broad will slow you down.
- d) Issues should be clearly articulated so that someone from outside of the organization can read the description and understand the nature of the issue.

Key issues that our organization must address through use of this strategic plan include:

1. _____

2. _____

3. _____

4. _____

5. _____

Appendix D — Goals for Board Committees and Chief Executive Officer

Organize Appropriate Board Committees

Board committees should be developed and link with each of the major strategic goals. For example, if a strategic goal is to build and develop the board, then consider creating a Board Development Committee. (Of course, you will have other types of board committees to address ongoing major activities that are not directly associated with types of strategic goals, for example, an executive committee.)

Create a Charter and Work Plan for Each Committee

One of the best ways to ensure that board committees are fully participative and effective is through use of charters and work plans for each board committee. A charter is like a job description for the committee and should be developed by the committee members and approved by the full board. The work plan should be as detailed as necessary for the committee to achieve its goals.

Charter & Work Plans for Your Board Committees

(Make copies of this page as required.)

Board Committee _____
Committee Chair _____

Charter (300 words or less)

Specific Committee Goals *(Linked to Strategic Goals)*

Goal # 1

Goal # 2

Goal # 3

Goals for the Chief Executive

The board is responsible for providing ongoing governance and direction to the organization. Typically, the board chooses to carry out its responsibilities by including the role of a chief executive in the organization. The board is responsible for overseeing the performance of that chief executive and evaluating their performance on a regular basis.

The chief executive should be attending to responsibilities and goals that are directly aligned with the strategic goals of the organization (as should the responsibilities and goals of everyone else in the organization). Therefore, after strategic goals have been identified, it's important for the board to update the performance goals of the chief executive (who, in turn, updates the performance goals of their management team and other employees in the organization).

Goals should be written to be more specific to the authority and resources of the chief executive.

Goals should be designed and worded to be "SMARTER", that is, specific, measurable, acceptable to the chief executive, realistic, timely, extending the capabilities of the chief executive and rewarding for him or her to accomplish.

Your Goals for Your Chief Executive

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

Appendix E – Staffing Plans

In this section, you should include an updated organigram and provide a detailed rationale for the staffing plan you've developed. Your staff should be organized in a way that supports the achievement of your strategic plan goals.

Note that in your planning, staffing should be specified in terms of full-time equivalents (FTEs). One FTE is equal to one full-time staff position throughout the year. For example, if staff will start half-way through a year, than include .5FTE.

Total Number of Staff Positions:

Year 1

Year 2

Year 3

Name, Title, Department, % Time for Strategic Goals (e.g. 30% on Goal #1 & 70% on Goal #2)

Name	Title	Department	Time Breakdown

Appendix F — Operating Budgets

You should develop a budget for each of the years included in the span of time covered by your strategic plan (ideally three (3) years)—with particular attention given to the first year of the plan.

You should attach your budgets to the plan, specifically ensuring that they align with the goals you've described herein.

Appendix G – Monitoring and Evaluation of Plan

In this section, you should describe in detail the specific ways you will monitor and evaluate the organizations successes and failures in achieving the goals outline in this strategic plan.

Key Questions While Monitoring Implementation of the Plan

Monitoring and evaluation activities will consider the following questions:

(The following questions should be modified to suit the nature and needs of the organization.)

1. Are goals and objectives being achieved or not? If they are, then acknowledge, reward and communicate the progress. If not, then consider the following additional questions.
2. Will the goals be achieved according to the timelines specified in the plan? If not, then why?
3. Should the deadlines for completion be changed (Be careful about making these changes—be sure you know why efforts are behind schedule before times are changed)?
4. Do personnel have adequate resources (money, equipment, facilities, training, etc.) to achieve the goals?
5. Are the goals and objectives still realistic?
6. Should priorities be changed to put more focus on achieving specific goals?
7. Should the goals be changed (Be careful about making these changes—be sure you know why efforts are not achieving the goals before changing them)?
8. What can be learned from our monitoring and evaluation in order to improve future planning activities and also to improve future monitoring and evaluation efforts?

Additional questions:

Appendix H – Communicating the Plan

Note that certain groups of stakeholders might get complete copies of the plan, including annexes, while other groups (usually outside of the organization) may receive only the body of the plan without all of the supporting documentation.

1. Every board member and member of management should get a full copy of the plan.
2. Consider distributing the plan to everyone in the organization. It's amazing how even the newest staff member gains quick context, appreciation, and meaning from reviewing the strategic plan.
3. Post your mission, vision and values statements on the walls of your main offices and on your website. Consider giving each employee a card with the statements (or highlights from them).
4. Publish portions of your plan in your regular newsletter, on your website, and in your promotional materials (brochures, ads, etc.).
5. Train board members and employees on portions of the plan during orientations.
6. Link portions of the plan in policies and procedures, including the employee manual.
7. Consider providing copies of the plan to major stakeholders—funders, trade associations, potential collaborators, government officials, vendors and suppliers, etc.

This plan will be widely communicated including through use of the following approaches:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____
