**Strategic Plan Outline**

[Title] [Date strategic plan was revised] [Date adopted]

1. **Introduction**

Like an Executive Summary – briefly summarize where the organization is and summarize highlights from the strategic plan.

1. **Mission and Vision**

* Mission statement – why your organization exists, what your purpose is
* Vision – what your organization hopes to achieve
* Can also put Core Beliefs/Core Values or Brand here

1. **SWOT or other Analysis**

* For SWOT Worksheet or other analysis tools, see Community Partners Resource Files
* Can also include a Competitive Landscape analysis of competitors

1. **Goals/Objectives**

* Use the SWOT analysis to create Objectives – ways to address what you found in your analysis
* Each department can have their own separate list of objectives and list of goals that will support those objectives
* What you will do through programs, activities, or products to realize your mission and vision (*example – the Human Resources Department will do additional staff development. The Communication Department will increase the newsletter circulation by 10%.)*
* These should be Measurable, Realistic, and toward the end of Achieving your Mission/Vision

1. **Action Plan/Strategies and Progress Indicators**

* Strategies for how you plan to accomplish the goals you created – who will do what, when they are completed, and how you will accomplish them
* How you will measure success or progress on these goals
* Each goal or objective should have several indicators of progress and several action steps for how you will accomplish them

1. **Accountability/Responsibilities**

* Who is responsible for completing objectives (*example - Staff, Board members, Board Committees, Volunteers*)
* Can also include a timeline for completion of goals/progress indicators

1. **Financial Management**

* Breakdown of Organization & Program Budgets
* Any financial objectives for the organization (*example - doing an annual organization budget, adding more funds to the organization’s reserve*)

1. **Fundraising and Development**

* Objectives and strategies (*example - diversifying revenue streams, applying for new grants*)

Strategic Planning Process

Prepare for Strategic Plan – Begin 4 months prior to adoption. Timeframe = 1 month

|  |  |  |
| --- | --- | --- |
| Steps | Stakeholders Involved | Accountable Party |
| Reach consensus on steps and responsibilities | Staff and Community Partners | Staff |
| Choose Steering Committee | Staff and Community Partners | Staff and Board Members |
| Steering Committee Meets   * Review mission and vision * Discuss strategic planning process | Steering Committee | Steering Committee Members |
| Gather information and summarize it.  Considerations:   * How will you gather information? * Whose responsibility? * What tools will you use – SWOT or other? | Staff and Steering Committee | Steering Committee |

Create Content – Begin 3 months prior to adoption. Timeframe = 1 month

|  |  |  |
| --- | --- | --- |
| Steps | Stakeholders Involved | Accountable Party |
| Planning Retreat – See CP Worksheet on Strategic Planning Retreats | Staff and Steering Committee | Steering Committee |
| Summarize Retreat | Staff and Steering Committee | Steering Committee, Community Partners as needed |
| Follow-up meeting:   * Develop a draft of the strategic plan – including financial projections * Staff or Board Member should create a draft prior to the meeting based on the retreat summary | Staff, Steering Committee, Community Partners | Steering Committee, Community Partners as needed |

Stakeholder Engagement – Begin 2 months prior to adoption. Timeframe = 1 month

|  |  |  |
| --- | --- | --- |
| Steps | Stakeholders Involved | Accountable Party |
| Review draft with staff and board | Steering Committee | Steering Committee |
| Review draft with community members and other stakeholders | Staff, Steering Committee | Steering Committee |
| Make revisions based on stakeholder input | Staff, Steering Committee | Staff, Steering Committee |

Implementation and Maintenance

|  |  |  |
| --- | --- | --- |
| Steps | Stakeholders Involved | Accountable Party |
| Approve Plan | Staff, Community Partners, Board | Board |
| Implement Plan | Board members and Staff | Staff, Board Members |
| Monitor Progress every 3-6 months and update as needed | Staff, Board Members, Community Partners | Staff, Board Members |

**Strategic Plan**

[Title] [Date strategic plan was revised] [Date adopted]

1. **Introduction**
2. **Mission and Vision**

Mission

Vision

1. **SWOT or other Analysis**

Strength

Weakness

Opportunity

Threat

1. **Goals/Objectives/Strategies**

Programs:

Strategic Objective #1

Goals that support the Strategic Objective

Volunteers:

Strategic Objective #1

Goals that support the Strategic Objective

Human Resources:

Strategic Objective

Goals that support the Strategic Objective

Board

Strategic Objective

Goals that support the Strategic Objective

1. **Action Plan and Progress Indicators**

**Objective 1 – Strategy**

*Who will do it*

*How will they do it*

*When will it be completed*

*Progress indicators*

*How will results be measured*

**Objective 2 – Strategy**

*Who will do it*

*How will they do it*

*When will it be completed*

*Progress indicators*

*How will results be measured*

1. **Financial Management**

**Breakdown of organizational budget**

Financial Objectives

Strategies to achieve objectives

*Who will do it*

*How will they do it*

*When will it be completed*

*Progress indicators*

*How will results be measured*

**Breakdown of specific program budgets**

Program financial objectives

Program strategies to achieve objectives

*Who will do it*

*How will they do it*

*When will it be completed*

*Progress indicators*

*How will results be measured*

1. **Fundraising and Development**

**Fundraising objective**

**Strategy**

*Who will do it*

*How will they do it*

*When will it be completed*

*Progress indicators*

*How will results be measured*

**Strategic Plan Board Retreat**

**Things to Consider**:

* Hiring a consultant
* Who will be present at the retreat
* Who will facilitate the retreat (if you don’t hire a consultant)

**Purpose of the Retreat**:

* Review History, Accomplishments, Lessons Learned
* Discuss/Adapt Mission and Vision – if needed
* Review Summary of Data Gathered
  + Identify key issues or choices
* Determine future direction and goals
* Create Goals for moving toward future direction
* Create Action Steps to achieve goals
* Assign responsibility and accountability for action steps and goals