

# STRATEGIC PLANNING TEMPLATE AND DIRECTIONS

## A 3-year planning model



## Strategic Planning Template and Directions – An Overview

On the following pages, you will find a Strategic Planning Template that is simple, yet powerful. After a one-page summary of definitions and descriptions, there is an example strategic plan followed by a BLANK plan template that you can use for your own organization. Here are a few suggestions for applying this template to your organization:

1. Start by thinking about **who should be part of your strategic planning process**. This should include board and staff – and can include volunteers and donors.
2. **Create a time-line of activities** that will describe the development of your strategic plan. This could include meetings and conference calls as well as draft reviews and final approvals. Include responsible individuals and key dates.
3. **Start with meetings or conference calls** so that everyone understands the process and the expected outcomes. Also, hold initial input meetings – to solicit everyone’s thoughts about points A. (Vision) through F. (Strategies). At these meetings, there is no need for complete agreement – but consensus is good.
4. **Assign the detailed development of your strategic plan to one to three individuals** – the CEO is a good choice to lead this effort. This small group will select the Critical Issues (D), set the Goals (E), and Strategies (F). They will then create a series of Objectives (G) and Actions (H) that will allow the resolution of the Critical Issues over the three-year period.
5. This same, small group can work with the Treasurer or Financial Manager to **create a 3-year financial plan** that outlines the general expenses and funding sources. Use round numbers and illustrate general trends here – that’s what’s important.
6. **Share this draft strategic plan** with the organization’s leadership, then the teams that provided input, and those who will be responsible for achieving the objectives. At each step, suggestions for improvement are incorporated into the plan.
7. **The Board of Directors votes to approve the completed strategic plan – and a celebration is a must.**

Feel free to add whatever additional pages of text you need to clarify unique situations or aspects of your organization that these charts can’t capture.

## DIRECTIONS AND DEFINITIONS

**A. Vision Statement** - One sentence answering these questions: What is our "big dream"? What will the world be like when we are 100% successful?

**B. Mission Statement**- One sentence that inspires staff, volunteers, board, and donors to be involved with the organization and that answers this question: What is our highest purpose? (If appropriate, the mission statement might answer who, what, when, where, or why of the organization.)

**C. SWOT Analysis** - A high-level summary of the organization's Strengths (internal) , Weaknesses (internal), Opportunities (External) and Threats (External). Bullet Points are fine here.

**D. Critical Issues** - Posed as a question, these are 3 or 4 fundamental concerns that face the organization currently that need to be addressed over the next three years. Critical issues often come from these areas: (1) operations growth (2) program additions, (3) infrastructure strengthening, (4) fundraising improvements or changes in funding sources, (5) external partnership strengthening or establishment, (6) board governance and organizational support improvement.

**E. Goals** - For each critical issue, provide a one-sentence, qualitative description of what your organization will achieve in the next three years.

**F. Strategies** - For each goal, provide 2-4 broad statements that describe your organization's approach to achieving the desired results.

**G. Objectives** - For each strategy, there will be 2-4 objectives. Each objective will be measurable, time-bound, specific, and assigned to a single person (staff, volunteer or board) who leads the activity and a group who provides support.

**H. Actions** - For each objective, list the activities (naming a responsible party and a due date) that need to be completed to achieve the objective. Check the "completed" box when the action is finished. (Use as many Objectives/Actions pages as you need for your plan.)

**I. Financials - A Summary Over 3 Years** – To estimate the changes in expenses and/or fundraising throughout the next few years, summarize the financials of your organization on this page. Round off to the nearest thousand dollars – and make estimates (both \$ amount and %) – the key here are the trends you are outlining. This data can easily be made into pie charts for your finished Strategic Plan.

## EXAMPLE

Strategic Plan for \_\_\_\_\_MAMBO ORPHANAGE\_\_\_\_\_

Date : \_\_\_\_\_April, 2008\_\_\_\_\_

Many thanks to the following people who contributed to this strategic plan: *List names here*

### **EXAMPLE : A. Vision Statement :**

No child grows up without the love and safety of a place called home.

### **EXAMPLE : B. Mission Statement :**

We provide a safe place in Nairobi for children without families to be loved, to learn and to prosper.

## EXAMPLE : C. SWOT Analysis

<b>STRENGTHS (internal)</b>	<b>WEAKNESSES (internal)</b>
<ol style="list-style-type: none"> <li>1. Strong, experienced staff</li> <li>2. 12 -years of experience - solid systems in place</li> <li>3. We are well-known throughout Nairobi</li> <li>4. Positive reputation among teachers, churches, government</li> </ol>	<ol style="list-style-type: none"> <li>1. Single donor provides 45% of our resources</li> <li>2. No financial capacity to expand if we have an emergency</li> <li>3. Lack of healthcare specialist at the orphanage</li> <li>4. Out-of-date membership list.</li> </ol>
<b>OPPORTUNITIES (external)</b>	<b>THREATS (external)</b>
<ol style="list-style-type: none"> <li>1. New university certificate provides more trained job candidates for our attendant positions.</li> <li>2. Some orphans are starting to graduate from high school and can be employed here.</li> <li>3. More tours being given at the school - and our orphanage.</li> </ol>	<ol style="list-style-type: none"> <li>1. Potential federal laws may create more paperwork for us.</li> <li>2. HIV trends could cause more orphans to need our services.</li> <li>3. Neighborhood school may shut down - where will our children go to school?</li> </ol>

**EXAMPLE : D. Critical Issues and E. Goals and F. Strategies**

<p><b>Critical Issues (These are our fundamental concerns)</b></p>	<p><b>Goals (Here's what we need to achieve)</b></p>	<p><b>Strategies (We'll take these 3 or 4 general approaches to achieve each goal)</b></p>
<p><b>1</b> How can we create a dialogue with our members and donors so that they can feel like they are a part of our community and provide us with more donations?</p>	<p>We will establish a system for multiple, meaningful contacts with each member and donor throughout the year.</p>	<p><b>1a</b> To provide periodic info to members and donors.  <b>1b</b> To create an annual donor appreciation event  <b>1c</b> Establish a link between major donors and our board.  <b>1d</b> Establish an annual membership meeting or tele-conference.</p>
<p><b>2</b></p>		<p><b>2a</b>  <b>2b</b>  <b>2c</b>  <b>2d</b></p>
<p><b>3</b></p>		<p><b>3a</b>  <b>3b</b>  <b>3c</b>  <b>3d</b></p>
<p><b>4</b></p>		<p><b>4a</b>  <b>4b</b>  <b>4c</b>  <b>4d</b></p>

## EXAMPLE : G. Objectives and H. Actions

<b>Strategy:</b> To provide periodic information to our members and donors.					
<b>Objective:</b> The Development Manager will establish a quarterly e-newsletter.					
<b>WHO</b>		<b>WHAT ACTIVITY</b>	<b>BY WHEN</b>	<b>MEASURED BY</b>	
<b>LEADER (Name person)</b>	<b>SUPPORT (Group or List)</b>				
Francis	Fundraising Committee	Establish a quarterly e-newsletter to be mailed out to everyone on our mailing list	December 1	Quarterly newsletters are a part of our operations	
<b>ACTIONS</b>			<b>Responsible Party</b>	<b>Due Date</b>	<b>Completed</b>
1 Establish list of all available donors and members with email addresses			Dev Mgr	6/1	
2 Hire temp service to call each donor/member w/o e-mail address to get it.			Dev Mgr	10/1	
3 Ensure all correspondence with potential donors includes the collection of email addresses (Development Mgr works with Marketing Manager)			Dev Mgr/Mkt Manager	1/1	
4 Establish an approved process for writing/reviewing each quarterly newsletter. (CEO approves)			Dev Mgr/CEO	11/1	
5 Assemble, approve, and send out first e-newsletter.			Dev Mgr	12/1	

## EXAMPLE - FINANCIALS – A Summary Over 3 YEARS

<b>Major Expense Categories</b>	<b>CURRENT YEAR Year 1</b>		<b>NEXT YEAR Year 2</b>		<b>THIS YEAR + 2 YRS Year 3</b>	
	\$ K	%	\$ K	%	\$ K	%
Salaries and Benefits	100	50	115	51	130	47
Food and Clothing	40	20	28	13	30	11
Housing Expenses	20	10	30	13	40	14
Fundraising	20	10	30	13	50	18
Other	20	10	22	10	27	10
<b>TOTAL</b>	<b>\$ 200</b>	<b>100</b>	<b>\$ 225</b>	<b>100</b>	<b>\$ 275</b>	<b>100</b>

<b>Major Funding Categories</b>	<b>CURRENT YEAR Year 1</b>		<b>NEXT YEAR Year 2</b>		<b>THIS YEAR + 2 YRS Year 3</b>	
	\$ K	%	\$ K	%	\$ K	%
Primary Benefactor	100	50	100	45	100	36
Other Major Donors	20	10	40	18	60	22
Memberships	20	10	35	16	75	27
Grants	60	30	50	21	40	15
<b>TOTAL</b>	<b>\$ 200</b>	<b>100</b>	<b>\$ 225</b>	<b>100</b>	<b>\$ 275</b>	<b>100</b>



Strategic Plan for \_\_\_\_\_

Date : \_\_\_\_\_

Many thanks to the following people who contributed to this strategic plan:

**A. Vision Statement :**

**B. Mission Statement :**

### C. SWOT Analysis

<b>STRENGTHS (internal)</b>	<b>WEAKNESSES (internal)</b>
<b>OPPORTUNITIES (external)</b>	<b>THREATS (external)</b>

### D. Critical Issues and E. Goals and F. Strategies

<b>Critical Issues (These are our fundamental concerns)</b>	<b>Goals (Here's what we need to achieve)</b>	<b>Strategies (We'll take these 3 or 4 general approaches to achieve each goal)</b>
1		1a 1b 1c 1d
2		2a 2b 2c 2d
3		3a 3b 3c 3d
4		4a 4b 4c 4d

## G. Objectives and H. Actions

<b>Strategy:</b>				
<b>Objective:</b>				
WHO		WHAT ACTIVITY	BY WHEN	MEASURED BY
LEADER (Name person)	SUPPORT (Group or List)			

### Acton Plan:

	ACTIONS	Responsible Party	Due Date	Completed
<b>1</b>				
<b>2</b>				
<b>3</b>				
<b>4</b>				
<b>5</b>				

## G. Objectives and H. Actions

<b>Strategy:</b>					
<b>Objective:</b>					
<b>WHO</b>		<b>WHAT ACTIVITY</b>	<b>BY WHEN</b>	<b>MEASURED BY</b>	
Lead (Name person)	Support (Group)				

### Acton Plan:

	<b>ACTION</b>	<b>Responsible Party</b>	<b>Due Date</b>	<b>Completed</b>
<b>1</b>				
<b>2</b>				
<b>3</b>				
<b>4</b>				
<b>5</b>				

## FINANCIALS – A Summary Over 3 YEARS

<b>Major Expense Categories</b>	<b>CURRENT YEAR Year 1</b>		<b>NEXT YEAR Year 2</b>		<b>THIS YEAR + 2 YRS Year 3</b>	
	\$ K	%	\$ K	%	\$ K	%
<b>TOTAL</b>						

<b>Major Funding Categories</b>	<b>CURRENT YEAR Year 1</b>		<b>NEXT YEAR Year 2</b>		<b>THIS YEAR + 2 YRS Year 3</b>	
	\$ K	%	\$ K	%	\$ K	%
<b>TOTAL</b>						