

Strategic Plan Template

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There is no one perfect strategic plan. Each organisation will have its own desired format for recording the strategic planning process. This template provides a base to start.

**Strategic Plan
Template**

**Strategic Plan for <name of the organisation>
Year <type in year>**

Executive Summary

While not every organisation will provide an executive summary it is good practice to get into because it provide stakeholders with an executive level summary of the process of strategic planning that has been followed.

Current Situation

As the name suggests this section looks at the current situation of the organisation. Some of the sub sections of this section could include:

Who are we?

This sub section looks at the most basic purpose of the organisation.

Where the organisation has a Vision and Mission statement it is the opportunity to review these to assess if they still address the fundamental purpose of the organisation. Any analysis of the Vision and Mission should address whether the Vision and Mission still clearly defines the organisation's customers and identifies the markets the organisation operates within.

Where an organisation does not have a clearly defined Vision and Mission it can still answer the question. The answer should provide them with their reason for operating.

What is our current situation?

The purpose of this sub-section is to look at the where the organisation is at this moment in time. Some of the tools the organisation can use to assess the current situation include:

Environmental Analysis

This type of analysis looks at the current environment within which the organisation operates. It can address both the macro (external environment) and the micro (internal) environment

Financial Analysis

This type of analysis looks at the organisation's current financial position.

SWOT Analysis

This type of analysis looks at the strengths (S) and weaknesses (W) of the organisation from an internal perspective and then the assessing the opportunities (O) and threats (T) facing the organisation externally.

Stakeholder Analysis

This type of analysis looks specifically at the people or groups who have a direct stake in the organisation. This may include members, government agencies, etc. The analysis assesses the current needs, motivations and characteristics of the organisation's stakeholders.

Objectives and Goals

This section identifies and records the strategic objectives of the organisation and the goals that are set to achieve these objectives.

A strategic objective may be defined as a long-term objective (usually three to five years) that enables a not-for-profit organisation to meet its vision (i.e. its purpose). One way of looking at strategic objectives is as mini vision statements. For example: *Grow our membership*. This type of strategic objective is broad and does not provide a timeframe or numbers for measuring the objective.

Setting strategic objectives can be a difficult process for a Board; however it is important to always keep in mind the main purpose or vision of the organisation. Then by answering the question: *What are the key activities that we need to do to achieve our vision?* the organisation will have identified a number of strategic objectives.

Once the strategic objectives have been identified the next step is to set the necessary goals that will ensure that the objectives are achieved. A strategic goal differs from a strategic objective in that it is specific and measureable and usually achievable within one to three years. When an organisation sets a strategic goal it is converting the organisation's vision and mission (it's purpose) into specific performance targets, which can then be measured.

Measurement and Evaluation

This section identifies the measurement and evaluation tools that will be used to assess whether the strategic objectives and goals have been met. This is basically an action plan that will identify when and how the objectives and goals will be measured.