

Strategic Planning Template

SAMPLE

Purpose

- Create the framework for the future direction
 - To inform organizational development, programmatic, and fundraising decisions and strategies

The Planning Process

- Based on context – needs analysis and research
- Deliberate decisions and choices, given a variety of options
- Starts at a strategic level and sets a few well-defined goals
- Answers: *What difference do we want to make in the “world?” What is the impact we want to have and how will we do that given limited resources?*

Outcome

- Strategic plan in outline form
 - Mission, vision, position, markets, imperatives, goals, objectives
- Organization implications
 - Including board and staff function, role and structure
- Action plan

Agenda

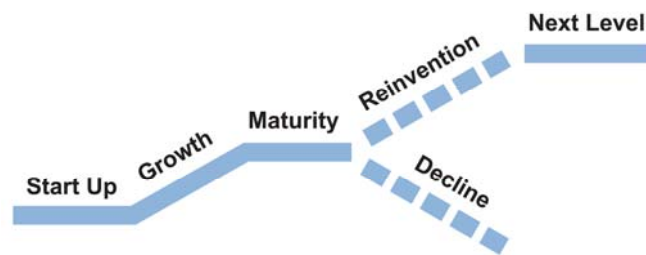
- Introduction
- Frameworks
- Situation analysis – context for decisions
- Strategic decisions – foundation for plan
- Imperatives
- Goals and objectives
- Organizational implications
- Additional resources
 - Boards
 - Strategic Alliances

Frameworks

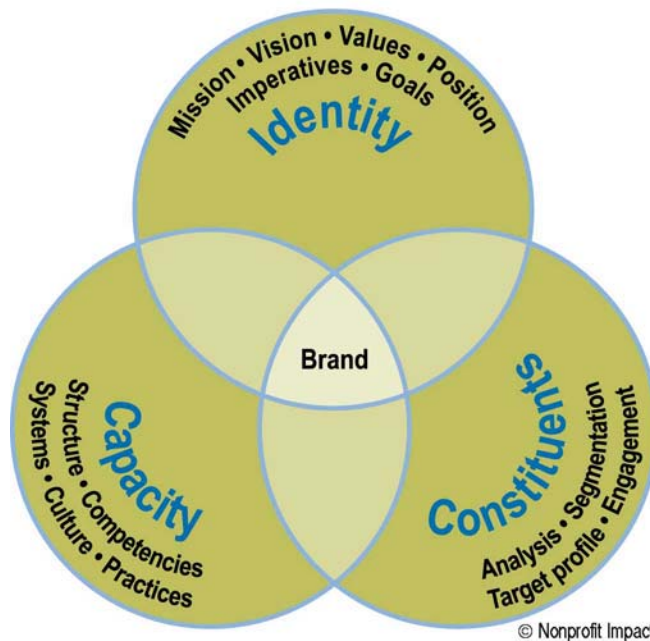
Strategic

Calculated and deliberate decisions based on internal, external, and market context and current and future trends and conditions; organization-wide, cutting across all programs and divisions


Next Level



Integrated Strategy for Organizational Sustainability



Definitions

	Name	Definition	Example
Why 	Results / Outcomes	The overall impact of achieving goals (behavior change, policy or system change).	Change in obesity statistics.
	Goal	What is achieved as a result of strategies and actions in specific, measurable, attainable, realistic, time-framed terms.	90% of the community can articulate that increased physical activity and better nutrition equals better health; 100% of low-income women breast feed for 6-months.
	Objectives / Strategies	A program or group of activities that says how you will achieve a goal; not all things, but the best, most effective way. (Best practices are examples.)	Launch a community-wide physical activity and nutrition role model program; Create a breastfeeding friendly community.
How	Activities / Tasks	The primary activities that need to be completed to achieve the objectives.	Write the brochures; Put state of the art breast pumps in the hospitals.

Plan Content and Useful Formats

Basic Plan Elements

Situation Analysis

- Needs analysis
- Relevant data and information
- Target market data, demographics, psychographics
- Institutional landscape

Strategic Issues / Decisions

- Fundamental decisions

Impact / Mission

- What difference must we make, why do we exist

Vision

- Descriptive, visual image of what it looks like when you are successful

Imperatives

- Those things you must do, to the exclusion of all else, to be successful moving forward

Goals / Ends

- Specific, detectable, realistic outcomes / results - what you will accomplish

Strategies / Objectives

- How you achieve goals – the few overarching strategies (not all the tasks) towards outcomes

Implementation

- Who is responsible and accountable for implementation
- What is the governing leadership and management authority and responsibility

Action Plan

- What are the tasks to be accomplished in the next 6 months / 1 year

Budget

Work Plan by Goal

Strategic Goal 1:

	Critical Tasks	Necessary Outcome	Primary Responsibility	Due Date
Objective 1				
Objective 2				
Objective 3				

Then... Organizational Development

Stop, Start, Transition

- Given goals and objectives, what do we stop doing, continue but change, start doing or transition out of?

Implications

- How does the Strategic Plan influence, enhance, or change *how* we do our work?
- What should be considered to create a more productive, efficient, and effective organization? How does the organization most fully leverage and optimize strengths and assets of *all* its human resources?

Organizational Design

Functions

- What functions must be carried out to achieve strategic goals? What skills are associated with these functions?

Structure criteria

- What are we trying to achieve through the organizational design? What are our criteria for a well-functioning organization?

Staff relationships and communication

- What systems need to be in place to support positive working relationships and effective and efficient communication?

Board

- What is the appropriate composition and structure of the board?
- What is the primary role of the board?
- What is the relationship of board committees to the whole board / to staff?
- How do board committees support the achievement of strategic goals?

Strategic Alliances

- An agreement between two or more entities stating that the involved parties will act in a certain way in order to achieve a common goal. Strategic alliances usually make sense when the parties involved have complementary strengths.
- One essential feature is that a strategic alliance is intended to move each partner towards achievement of some long-term strategic goal.
- Alliances are formed to provide complementary goods and services or to allow new businesses to develop; or to synergistically create value resulting from the coming together of previously separate resources, position, skills, and knowledge.
- It's about creating new value together, not simply an exchange.
- Successful alliances require active collaboration. Active collaboration takes place when companies develop mechanisms – structures, processes, and skills – for bridging organization and interpersonal differences and achieving real value from the partnership.

Constituents

- Who are the core constituents?
- What value do we provide?
- How do we reach and engage them over the long term?
- What are their needs and how do we meet them?

Fundraising and Business Model

- What are the sources and uses of funds?
- What is our sustainable revenue stream? What is realistic and feasible?

Summary and Next Steps



Nonprofit Impact specializes in organizational development consulting services to nonprofits and public agencies nationwide. Our services include strategic planning and positioning, marketing, fundraising, and organizational analysis and development. We help our clients go to their next level of success.

Nonprofit Impact serves organizations and agencies dedicated to improving the health and well being of individuals and communities, and those working to create a more civil, just, and equitable society. Our sister company, Conservation Impact, is dedicated to helping organizations achieve results towards environmental conservation and resource sustainability. Together, the two companies have worked with nearly 500 organizations on more than 765 projects.

For more information about the company, our services, or our team, please call us at 303.223.4886 or visit us online at www.nonprofitimpact.com or www.conservationimpact.com

Shelli Bischoff-Turner ■ Karen Buck ■ Leni Wilsmann ■ Jennifer Burstein



1792 Wynkoop Street, Suite 307 ■ Denver, CO 80202
303.223.4886 ■ www.nonprofitimpact.com