

STRATEGIC PLANNING

Step-by-Step Template



Strategic Planning Template

Key Components

Many agencies have no strategic plan because they feel it is unnecessary, too complicated or just a lot of work to validate what it already “knows” it should be doing.

The fact is, every nonprofit needs a plan, even small ones. While large nonprofits have bigger margins for error and can retool if a mistake or misallocation is made, the small agency has no such margin and has to be right every time.



This template takes the mystery out of planning by providing simple definitions for each section of a strategic plan.

By gathering a team of key stakeholders—board, key staff, volunteers, and outsiders, an agency can usually create a solid, workable strategic plan.

An outside facilitator would be well worth the cost to manage the discussion and keep everyone on task.

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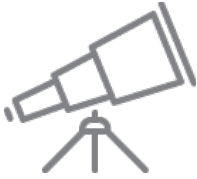
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Key Components

VISION

A high-level statement, or aspiration, describing what your organization would ideally like to see (or become) in the future.



MISSION

Why your organization exists and the role it plays toward achieving your Vision.



VALUES

A high-level set of ground rules, or beliefs, describing how your organization will conduct itself as it pursues its mission.



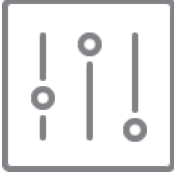
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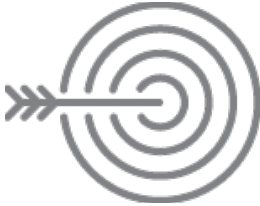
KEY STRATEGY

A high-level priority, plan, or initiative the organization has decided to pursue.



SMART GOALS

Specific milestones or successes to be achieved along the way of pursuing your strategies.



METRICS

The measurements used to evaluate progress and results toward completion of a goal.



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