Strategic Planning Template

1. **Introduction**

The purpose of this section is to provide background information about your organization as well as the strategic plan. This section should tell the story of your organization’s history, establishment, and purpose, as well as what you are doing now and what your plans are for the future.

**Pro tip**: *organizational engagement is key in establishing a strong foundation for your strategic plan. You want people’s support and buy-in.*

* 1. Organization Setup and Operation
* When was your organization established and why?
* What is your organization’s legal structure? (i.e., Not-for-profit, limited partnership, or corporation)
* What is your organization governance structure? (i.e., Do you have a board of directors or another decision-making body?)
* What programs, services, and activities is your organization maintaining and offering?
  1. Vision, Mission, Value and Guiding Principles
* What is the vision, mission, value, and guiding principles for your organization?
  1. Need for Strategic Planning
* Why do you want to complete a strategic plan?
* What makes “now” the best time for you to pursue a strategic plan?
  1. Strategic Planning Approach
* What methods (i.e., hosting engagement sessions with organization staff) will you adopt to help you make a strategic plan?
* What is the timeline for your strategic planning initiative?
* Who will you involve (within or outside your organization) in creating this strategic plan?
* What milestones do you expect to achieve through this strategic planning initiative?

1. **Strategic Direction**

This section explores your organization’s overall priority areas in the upcoming years as well as specific tasks required to execute the organizational vision. You should include as much information as possible.

**Pro tip**: *Solidify and be crystal clear about your planning areas and activities for implementation.*

* 1. Organization’s Past Achievements
* What are some major efforts and highlights of your organization since establishing?
* What are some gaps you have identified?
  1. Planning Themes
* What are the planning areas in your strategic plan?
* What are your objectives and goals under each planning area?
* What are the prioritized activities for implementation under each planning area?
* How do you plan on achieving the outcomes you outlined in section 1?
  1. Prioritization Framework
* What mechanisms and tools will you use to conduct the prioritization process in order to produce a list of prioritized activities?

1. **Implementation Plan**

This section should contain a detailed table illustrating how prioritized ideas will be executed and implemented over a defined and realistic timeframe. See an example of the table:

**Pro tip**: *the implementation plan table should reflect all discussions in section 2. Be disciplined about what activity to include in each area. Consider resource (finance, HR), technology, overall capacity, timeline and most importantly your mandate, mission and vision.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Planning Areas | Goals | Year 1 | Year 2 | Year 3 | Year 4 | Year5 |
| Area 1 | Goal 1 | Activity 1 | Activity 2 | Activity 3 | Activity 4 | Activity 5 |
| Area 2 |  |  |  |  |  |  |
| Area 3 |  |  |  |  |  |  |
| Area 4 |  |  |  |  |  |  |

1. **Monitoring, Evaluating and Reporting**

This section outlines your plan for monitoring and reporting. Consistent monitoring and evaluating is crucial for keeping you on track. Regular reporting allows you to create transparency and accountability as well as ensures compliance and effective communication throughout the organization.

Pro tip: this step is to be given equal importance as the previous sections. Don’t wait until after you’ve started implementation to create a functional monitoring, evaluating and reporting system. You need this information to stay informed so you can make necessary adjustments as you go.

* How will the reporting process look like for you to track the strategic plan?
* What tools you will use to report implementation progress?