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STRATEGIC PLANNING TEMPLATE



Guide/Template Strategic Planning

Why you should care

No matter the size, vision or type of your organization, strategic planning is a critical step in helping you move and grow in the right direction. To start a strategic planning initiative, it is crucial to first identify the unique value your organization holds. Be clear about your organizational capacity, then engage with key personnel within your organization to explore priorities based on all the foundational work you have done to date. These priorities will then be planned over a defined amount of time to help you focus on the most important aspect - **implementation**. We have provided a foundational template to help you get started on your strategic planning journey. By following these steps, you will be able to create a functional and implementation-ready strategic plan.

Guide

Part 1 Introduction

a. Organizational Setup and Operation

- Include your *current legal structure* (i.e. not-for-profit organization, or limited partnership, or corporation) and *the governance structure* of your organization (i.e. how your decisions are made)
- State *what motivates* your operation and organization as a whole

b. Vision, Mission, Value and Guiding Principles

c. Need for Strategic Planning

- Include *why there is a need* to develop a strategic plan here and now

d. Strategic Planning Approach

- State *who* is involved in creating the strategic plan
- Present *the timeline* of the strategic planning initiative
- Explain *the process and methodology* used to produce the strategic plan (i.e. engagement sessions or surveys)

Part 2 Strategic Direction

a. Organization's Past Achievements

- Present your organization's *achievements* to date

b. Planning Themes

- Present the strategic planning outcomes. This can include:
 - The planning areas
 - Goals and objectives
 - Summarized input from those who participated in the planning process

c. Prioritization Framework

- Recommended activities and tasks that are prioritized to be implemented in upcoming years

Part 3 Implementation Plan

- Present a *well-defined table (plan)* showing the prioritization of activities and tasks over a realistic and defined timeframe

Part 4 Monitoring, Evaluating, and Reporting

- State how you are going to support the implementation of prioritized activities and how you plan on ensuring alignment between implementation and strategic directions through monitoring and reporting.

