

Strategic Planning on a Budget – The Template

By Bob Harris, CAE

There are common elements in every strategic plan. If an organization does not hire a facilitator, this template will guide the board to ensure the plan is complete.

The eight elements are described in the order they should be considered at the planning retreat.

1) Planning Participants - Identify who is participating in the planning process --- a combination of board, staff and select participants such as vendors and key stakeholders. By including names in the final plan you promote “signature quality” work and added buy-in. *Too many people can slow the process; too few limits input.*

2) Duration – Determine the duration of the plan; are you planning for two, three, four or five years? *Be realistic; national organizations usually plan 4 to 5 years; smaller organizations are more flexible, and may plan for 2 or 3 years.*

3) Mission Statement - A required statement that should align with the statement of purpose in IRS Form 990 and the bylaws; also give consideration to national, state, regional affiliate missions. It may express who we are, who we serve and what we offer; easily articulated and motivating. Usually one sentence.

4) **Vision Statement** - An optional¹ statement but an important element in communicating strategic direction. An inspiring statement describing where the organization desires to be.

5) **Values Statement** – Another optional statement but a part of the projected public image. Values are the core principles of board and staff. Often expressed as bulleted key words or statements.

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6) **Goals** - The goals are broad priorities for the organization, for example “Growth and Expansion,” or “Economic and Workforce Development.” Most strategic plans include 3 to 7 carefully selected goals relevant to stakeholder needs and available resources.² *Goals should be SMART: Specific, Measurable, Attainable, Realistic, and Timely.*

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¹ Together, the mission, vision and values statements make up the organization’s brand platform.

² When promoting the mission, vision, values with the broad goals, the stakeholders/members have an understanding of what the organization is doing for them.

7) **Strategies** - Within each goal are strategies, initiatives, projects and priorities that will advance the goal. For example, the “Growth and Expansion” goal may include strategies that suggest creating of 3 new chapters in 24 months, hiring a staff person to focus on expansion, and maintaining chapter stability through leadership training.

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8) **Action Steps and Accountability** - To accomplish the goals and strategies, the plan should include quantifiability by setting performance measures. Identify who (i.e. committee, volunteers, and staff) will be in charge of the tasks, how success will be measured and the necessary interim dates and deadlines. Be as precise as possible to ensure that progress is monitored and work is accomplished. (*a.k.a. KPIs – Key Performance Indicators.*)

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✓ **Stay on Track** – To stay on course, review the plan at least yearly and undergo/repeat a full planning session every 3 years.