

Strategic Plan Outline

Introduction: The good news is that there is no set layout for a strategic plan. The bad news is that there is no set layout for a strategic plan. The lack of guidance can make it daunting. Below is one way that you could layout your plan. Make it work for your organization.

I – Letter from Board Chair: This one-page cover letter introduces the plan to readers and gives the board’s stamp of approval.

II - Executive Summary: This one to two-page section serves as a summary of the strategic plan. An executive summary should: reference the mission, vision and values, highlight core goals, provide an overview of the process used to create the plan, outline how the plan will be evaluated on an on-going basis, and express gratitude for those involved in funding and creating the plan. The executive summary should stand alone, as well as flow with the rest of the document. It should excite the reader about the future of the organization.

III: About the Organization: This section provides background about the organization for readers who may not be deeply familiar with it. This section typically includes two subsections:

- A. *Mission, Vision and Values:* List mission, vision and value statements verbatim. No introduction or explanation is needed.
- B. *Organizational History and Landmark Achievements:* In one to two pages, summarize the history of the organization with a focus on major accomplishments, particularly recent ones. This is your chance to sell the organization to the reader.

IV: Goals, Strategies and Tactics: This is the heart of the strategic plan. It is where the goals and strategies are laid out. It is the section of the plan that board and staff members will read many times over the course of implementation. Most organizations included 3-5 strategic goals. The strategic goals are supported by program, financial, administrative and governance strategies. There are many acceptable layouts for this section. Below is one example.

Goal: Diversify our funding base in order to lessen our dependence on X foundation.

- Strategy 1: Increase the Board's role and capacity to do fundraising.
 - Yr 2015: Hire an outside consultant to train board members in individual donation solicitation.
 - Yr 2015-2018: Maintain 100% board giving.
- Strategy 2: Improve our marketing materials as a vehicle for increasing funding.

V: Financial Projections: Include a three-year projected budget. Displaying aspects of the budget graphically may be beneficial.

VI: Appendices (optional): Appendices are used to include additional support data, such as a summary of interviews/focus groups/surveys and/or the organization's assessed strengths, opportunities, weaknesses and threats. Appendices should only be included if they enhance readers' understanding of the plan. A plan is often strengthened through brevity.