

The Do-Good Strategic Plan Template for:
***Non Profits, Charities and
Volunteer Organizations***

Developed by:



Website: <http://www.rebeccamacfarlane.com>

Phone: 615-389-0207

[Your Organization's Name Here]

Strategic Plan for

[Enter the Period of Time this Plan Covers]

Developed on [Date you completed the plan]

Last Reviewed on:

[Update the dates you review the plan –
at least every 3 months!]

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Background

Guidance: This section might be the longest in your plan. It should be up to a page or so outline all the key facts of your organization and the field within which you are working. Here are some questions to try and cover for this section.

1. How long has the organization been in business? What is the legal status of the organization?
2. What is the staffing profile and structure of the organization (including unpaid staff)?
3. What need does the organization serve? Why is this important to the world right now?
4. Is the need for the organization growing or shrinking? (Do a bit of research!)
5. What kind of geographic boundaries does the organization have? What is your reach and what is the potential for your business in terms of numbers?
6. What is the profile of your most likely service users? Is it men, women, children? What are their ages? What do you know about this group of people? How does the organization address their needs?
7. What successes did the organization have last year?
8. What challenges do you anticipate next year that will need to be addressed?

Vision

Guidance: This is the place to really dream big! Imagine the organization was wildly successful, with unlimited resources, and no barriers whatsoever. What would be different about the world? How would the lives of your service users and the community you serve change?

A good vision is inspiring, focuses on serving the world, and is very ambitious. It is often the ideal result, and is bigger than just what you (or your business) can deliver alone. It should be developed in consultation with your Board and Executive Management Team.

Try and develop a Vision of the world if your organization could serve every single person who needs your services. Capture what the world would be like if you could do this in 3-5 sentences.

Your Vision Checklist:

- Does it excite you?
- Does it tell the world about the good you want to do?
- Is it bigger than you? (In other words, is it more than you can do alone?)
- Is it simple?
- Is it clear?
- Is it about what you can give? (not about what you'll get)

Mission

Guidance: People often confuse the Vision and Mission, but they serve two distinct functions. The Vision captures how you want the world to change. The Mission is about the organization’s purpose. For example:

Vision – A world where every person is living and working to their full potential. (The result of your good works and possibly those of other like-minded organizations.)

Mission – Helping people discover their career potential and supporting them in making changes to bring this potential into the world. (Your role in delivering the vision. What you’ll do to help bring about this change in the world.)

Capture here how you serve people, and what your role in delivering the Vision will be. This again is usually a sentence or two, and should be developed with your Board and Executive Management Team.

Your Mission checklist:

- Does it tell the world about the purpose of the organization?
- Is it clear and simple?
- Will it help keep you focused on the right things?
- Does it link in well with your Vision and tell people your part in delivering it?

Values

Guidance: Organizational Values are critical for a do-good business! They will guide decisions and tell the world how you will interact with those you serve. Below is a list of values that are common in business. Choose up to ten (or add your own) and compose a sentence or two for each telling the world how this value will guide your business and help you achieve you Vision and Mission. Again, this is an activity that should involve your Board and Executive Management Team.

Integrity	Teamwork	Partnership	Honesty
Communication	Respect	Safety	Attitude
Customer Service	Trustworthy	Diversity	Individuality
Creativity	Growth	Achievement	Competence
Accountability	Community	Community	Quality
Commitment to Success	Ethical	Legal	Professionalism
Fairness	Responsibility	Consistency	Empowerment
Fun	Risk-taking	Efficiency	Balance
Loyalty	Optimism	Reliable	Inspiring

Championing the Cause

Guidance: You now have an important message for the world (your organizational vision and mission), so it's essential that some thought is given as to how this will be communicated this to others. Instead of "marketing" your services, think of it as "championing the cause."

This is the place to capture how best to communicate how you'll help your service users and the role you'll play in the community. Use the template below to structure this thinking and develop a plan to take your message into the world!

Your Board is your mouthpiece and will have a key role in Championing the Cause. Make sure that they are invested in delivering these activities and that their strengths and skills are taken into account when you design the methods of communicating.

MARKETING AND COMMUNICATION PLAN

What groups do we need to serve most?	What do they need to hear from us?	What is the best way to find and communicate with them?	When will we communicate with them? How often?	How will we know if they have heard our message?
<i>Try to divide your audience into groups – service users, community leaders, funders, etc. There may be several groups but they will need you to communicate slightly different messages to them.</i>	<i>What need do they have? What problem can you solve for them? In the case of community leaders, etc., what do they need to hear about us?</i>	<i>Where are they? Do they communicate online? In person? Are there networking groups, events, or trainings that you can participate in to give an opportunity to communicate with them?</i>	<i>Will you reach out to them daily? Hold networking events once a month? Hold a supporter's luncheon? Send out a quarterly newsletter?</i>	<i>If this works, how will you know they have heard you? What will success look like?</i>

Objectives and Priorities This Year

Guidance: Now that you have some clarity about the big picture of your organization and its message to the world, it's time to break your activities down into achievable steps. In this section, develop 3-5 objectives or priorities that you can focus on THIS YEAR to help take you a few steps closer to the vision. Keep them somewhat high level and try to make these SMART:

S – Specific

M – Measurable

A – Achievable

R – Realistic

T – Timebound

For example, a SMART objective might be:

To develop two or three packages of services and materials to support single mothers in attaining well-paid work, and launch these online by August 2012.

This is specific in that it tells you what you want to do and who it will serve. You can measure the number of packages and services, and it has a deadline.

Only you will know if this is realistic or achievable – there are too many variables there for me to guess! Use your own judgment and weigh these up against one another once you have 3-5 objectives to determine if they are achievable. For example, is it realistic to have this completed over the summer if you have key staff members taking vacations or going on holiday? Don't be too ambitious, but do try and make these challenging!

Your objectives and priorities checklist:

- *Did you limit it to 3-5 things?*
- *Are your objectives SMART?*
- *Do they support your Vision and fit in with your Mission?*
- *Are you clear how your values will support you in delivering these things?*
- *Are your activities spread out across the year? Have you checked the timing of them against other commitments and known patterns in your business?*
- *Are all your activities in your Communication Plan accounted for?*
- *Does it feel exciting to see what you could accomplish in the next year?!*

People Development Plan

Guidance: In any business, it is important not to neglect the life-blood of the organization – the people! Your Board, Managers, Staff and Volunteers will need the right skills and knowledge to work together to deliver your goals. Use the template below to help guide you in planning how you’ll make sure they have what they need to do this important work.

Area of Development Needed	What will be done	When	Cost of this development (Both in terms of time and money)
<i>Example: Website design, leadership skills, accounting, grant writing</i>	<i>Attend a course, read a book, talk to someone and get tips</i>	<i>By the end of July</i>	<i>2 days time; \$125</i>

Next, (and this is important!) summarize how this personal development will help your people to deliver your services better. How will investing this time, energy and resource help you and your staff deliver the organization’s objectives and mission this year?

Operating Budget

Guidance: Use the worksheet below to help you determine if the activities and plans you want to undertake are achievable with the financial resources you have available to you this year. You can keep this fairly high level, and supplement it with detailed balance sheets, cash flow statements, etc. in an appendix if these are needed.

This worksheet is a very simplified version of a profit/loss ledger. Consult your accountant or bookkeeper for advice on developing a more detailed financial planning document. There are plenty of software options available on the market that can help you develop more detailed financial plans, which can help you monitor and track your costs closely. These are definitely worth the investment!

Estimated Operating Budget Worksheet

	<i>Estimated Amount</i>	<i>Actual</i>
Expected Income		
Grants		
Donations		
Fundraising		
Interest		
Other income		
	TOTAL:	
Expected Expenditure		
Staffing Costs		
Office running costs (rent, etc.)		
Supplies		
Mileage		
Staff development		
Marketing		
Other costs		
	TOTAL:	
Programs/Project Costs		
Program 1 (may relate to Objective 1)		
Development costs		
Marketing Costs		
Running Costs		
Staffing Costs		
	TOTAL:	
Program 2 (may relate to Objective 2)		
Development costs		
Marketing Costs		
Running Costs		
Staffing Costs		
	TOTAL:	
TOTAL EXPENDITURE:		
TOTAL Profit/Loss:		
<i>(Income – Total Expenditure)</i>		

Risks and Opportunities

Guidance: It's a good idea to spend just a bit of time thinking about what might not quite go to plan over the year so that if we can watch out for them or take corrective action, it will limit the damage. This is called risk management.

Likewise, it's a good time to think about any opportunities that we haven't thought about yet so that we don't miss any good ideas along the way.

Use the tool below to think about all the things that could go wrong, and to plan how you'll deal with these things. (This is called a SWOT Analysis.) Think too about what could go really, really right in terms of new opportunities for your business. How will you react to these things? This is a very good tool to use with your Board and/or Executive Management Team as part of your planning processes.

SWOT Analysis

<p>Strengths <i>(List here anything you can think of that makes your organization amazing! What can you rely on to deliver your services?)</i></p>	<p>Weaknesses <i>(What isn't quite the way it should be yet? What is missing?)</i></p>
<p>Opportunities <i>(List here any potential opportunities to really push your organization forward that you have not yet taken advantage of.)</i></p>	<p>Threats <i>(List here anything that might get in your way of achieving your goals – such as funding you aren't sure of yet, relationships that might break down, etc.)</i></p>

Risk Register

Use the table below to capture any risks that are identified during your SWOT analysis, and any others you are aware of that might come up over the next year. (You may want to expand on this as part of your organizational governance activities and review them at Board meetings at least quarterly.)

Risks Identified	Controls in place	Who is responsible
<i>Example: Grant funding is reduced and resources are not available to cover the operating costs of the organization.</i>	<i>Good relationships with government officials.</i>	<i>Executive Director</i>
	<i>Expertise in grant writing in house.</i>	<i>Executive Director</i>
	<i>Diversity of income sources developed</i>	<i>Board</i>

Success Measures

Guidance: All these actions and activities will be worthless if you don't know how to measure the good you're doing by undertaking them. In this section, capture how you will manage programs and monitor your success. What will tell you that the things you're doing are working to bring your message to the world and helping you achieve your Vision and Mission? Focus these on what you'll look for THIS YEAR. You may want to have up to 10 of these, or you can simply find one for each of your objectives/goals/priorities. For example:

Objective: *To develop two or three packages of services and materials to support single, child-free women in discovering their life's purpose, and launch these online by August 2012.*

Measures:

- Interview prep classes launched by 1 Aug 2012.*
- 10 trainees enrolled each month between August and December.*
- Good feedback from trainees on how useful the class was in helping them prepare for an interview.*
- Number of trainees who get a job by 1 Jan 2013.*

Measures of Success:	When this will be measured: (Try to have measures throughout the year)

Management Plan

GUIDANCE: Capture how often you’ll review this Plan and how decisions about priorities and changes will be made. It is essential that you don’t do all this great work and the let it gather dust on a shelf somewhere. Your Plan will be “LIVE” and will need to reviewed and updated at least every quarter by your Board and your Executive Management Team.