**STRATEGIC PLAN TEMPLATE
FOR NONPROFITS**

Nonprofit Organization Name

STRATEGIC PLAN



PREPARED BY

Author Name

DATE PREPARED

00/00/0000

Version

0.0.0

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# BACKGROUND

## Legal Name and Address

|  |
| --- |
|  |

## Time Period in Existence

|  |
| --- |
|  |

## Needs Served / Importance

|  |
| --- |
|  |

## Geographic Region Served

|  |
| --- |
|  |

## Target Audience

|  |
| --- |
|  |

## Successes of Past Year

|  |
| --- |
|  |

## Anticipated Challenges

|  |
| --- |
|  |

# VISION

|  |
| --- |
| Envision the ideal result of the work of the organization |

# MISSION

|  |
| --- |
| A focused description of the organization's purpose |

# WHO WE SERVE

|  |
| --- |
| Membership / Audience Demographic |

# MARKETING & COMMUNICATIONS PLAN

|  |
| --- |
|  |

# VALUES

Choose ten of the values listed below or your own additions and write a sentence for each describing how this value guides your business and helps the organization achieve its vision and mission.

|  |  |  |  |
| --- | --- | --- | --- |
| • Integrity  | • Trustworthiness  | • Quality  | • Fun  |
| • Teamwork  | • Diversity  | • Commitment to Success  | • Risk-Taking  |
| • Partnership  | • Individuality  | • Ethics  | • Efficiency  |
| • Honesty  | • Creativity  | • Lawfulness  | • Balance  |
| • Communication  | • Growth  | • Professionalism  | • Loyalty  |
| • Respect  | • Achievement  | • Fairness  | • Optimism  |
| • Safety  | • Competence  | • Responsibility  | • Reliability  |
| • Attitude  | • Accountability  | • Consistency  | • Inspiration |
| • Customer Service | • Community  | • Empowerment  |  |

|  |  |  |
| --- | --- | --- |
| 1 | Value One | Sentence One |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 10 |  |  |

# OPERATING BUDGET ESTIMATE

## PROJECTED INCOME

|  |  |  |
| --- | --- | --- |
|  | ESTIMATED AMOUNT | ACTUAL AMOUNT |
| Grants |  |  |
| Donations |  |  |
| Fundraising |  |  |
| Interest |  |  |
| Other Income |  |  |
| TOTAL |  |  |

## PROJECTED EXPENDITURE

|  |  |  |
| --- | --- | --- |
|  | ESTIMATED AMOUNT | ACTUAL AMOUNT |
| Staffing Costs |  |  |
| Office / Overhead |  |  |
| Supplies / Equipment |  |  |
| Marketing |  |  |
| Staff Development |  |  |
| Mileage |  |  |
| TOTAL |  |  |

## TOTAL PROFIT / LOSS

|  |  |  |
| --- | --- | --- |
|  | ESTIMATED | ACTUAL |
| ( Income – Expenditure ) |  |  |

# SITUATIONAL ANALYSIS (SWOT)

* Opportunity One
* Opportunity Two
* Opportunity Three
* Opportunity Four
* Threat One
* Threat Two
* Threat Three
* Strength One
* Strength Two
* Strength Three
* Strength Four
* Weakness One
* Weakness Two
* Weakness Three

# SMART OBJECTIVES

S-Specific, M-Measurable, A-Achievable, R-Realistic, T-Timebound

List 3 to 5

|  |  |
| --- | --- |
| 1 | Objective One |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

|  |  |
| --- | --- |
| WHAT THE AUDIENCE NEEDS TO HEAR |  |
| BEST WAY TO REACH & COMMUNICATE |  |
| COMMUNICATION SCHEDULE & FREQUENCY |  |
| HOW TO MEASURE MESSAGE REACH |  |
| ADDITIONAL COMMENTS |  |

# MEASUREMENTS OF SUCCESS

|  |  |  |
| --- | --- | --- |
| MEASURABLE COMPONENT DESCRIPTION | WHEN TO MEASURE | HOW TO MEASURE |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# ACTION PLANS

## YEAR ONE – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## YEAR TWO – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## YEAR THREE – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## YEAR FOUR – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |
| --- |
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