

**Strategic Planning Template**

**Part 1: Introduction**

* Purpose of plan
* Timeframe of plan
* Plan authors

**Part II: Background information and assessment**

Organizational capacity assessment

* Where does the organization have strong capacity to build and sustain performance?
* Where does the organization need to develop capacity to build and sustain performance?

*Note: NorthSky recommends using a standardized organizational capacity assessment tool that has been tested and validated. Contact NorthSky for further information.*

Environmental assessment

* Who do we serve? What are their needs? How will their needs change over the next three years?
* Where are we at in our lifecycle?
* Competitor analysis: who do we compete with for resources?
* How will the environment we operate within change over the next three years? What should we prepare for?

*Note: put all data/ tables in appendix; write this section as a narrative summary outlining key points.*

Performance assessment

* Organizational sources of funding (3 year history)
* Client satisfaction data, if available
* Outcomes data, if available
* Staff retention data, if available
* Volunteer retention data, if available

*Note: put all data/ tables in appendix; write this section as a narrative summary outlining key points.*

**Part III: Affirmation**

* Affirm organizational mission (purpose) and values (if pertinent)
* Describe strategic vision

**Part IV: Strategy Development**

* Establish strategic goals
* Outline key strategies (objectives)
* Develop action steps required to implement strategies
* Identify measures of success

**Part V: Implementation**

* Organizational structure required to implement plan
* Board committee structure
* Resources needed to implement the plan (budget, staff, training, etc.)

**Implementation Grid**

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| ***Strategic Goal 1:*** | | | | |
| **Strategy** | **Timing** | **Lead** | **Measure** | **Status** |
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| ***Strategic Goal 2:*** | | | | |
| **Strategy** | **Timing** | **Lead** | **Measure** | **Status** |
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| ***Strategic Goal 3:*** | | | | |
| **Strategy** | **Timing** | **Lead** | **Measure** | **Status** |
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| ***Strategic Goal 4:*** | | | | |
| **Strategy** | **Timing** | **Lead** | **Measure** | **Status** |
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