

## Worksheet 4.6

# Sample Strategic Plan Formats

## Sample Format 1

### Table of Contents

#### **I. Introduction by the President of the Board**

A signed letter from the president of the organization's board of directors introducing the plan; essentially gives a "stamp of approval" to the plan.

#### **II. Executive Summary**

Summarizes the strategic plan in one or two paragraphs; states the mission and vision, highlights the long-range goals, and recognizes participants involved in the strategic planning process.

#### **III. Mission and Vision Statements**

Stand-alone statements; no introductory text is necessary because essentially they introduce and define themselves.

#### **IV. Organization Profile and History**

Briefly covers the history of the organization, which provides context for the organization as it exists today.

#### **V. Critical Issues**

Provides the rationale behind the overall strategy and describes the issues that led to the development of the goals; usually presented as a brief outline or more extended narrative.

#### **VI. Program Goals and Objectives**

Serves as the "plan of action" that guides operational planning and evaluation of success.

#### **VII. Management Goals and Objectives**

Emphasizes the distinction between service/program goals and organization/management goals to provide a clearer understanding both of the difference and the relationship between the two sets of objectives.

#### **VIII. Appendices**

Contains relevant documentation that enhances understanding of the strategic plan, or data that supports program goals and objectives.

## **Sample Strategic Plan Formats**

### **Sample Format 2**

#### **Table of Contents**

#### **I. Letter from the Executive Director**

Summarizes the work that went into the plan and thanks those who helped bring it together.

#### **II. Introduction**

Briefly describes the history of the organization, the planning process, and the results of data collection.

#### **III. Mission Statement**

Defines the mission of the organization.

#### **IV. Strategic Direction**

Describes where the organization intends to focus its efforts in the future, and why this strategy was adopted.

#### **V. Primary Service Areas**

Highlights the major service areas of the organization (e.g. “Advocacy” and “Training”) and identifies the strategic goals related to these areas.

#### **VI. Primary Trends**

Describes trends and focus areas that emerged as part of the data collection process, and that inform and guide the organization’s priorities.

#### **VII. Tactical Priorities**

Delineates specific areas of focus (e.g. “Capacity Building” and “Member Services”), the tactical goals for each area, and the activities needed to accomplish those goals.

#### **VIII. Conclusion**

Summarizes the goals and offers projections for the future of the organization, along with a reiteration of the organization’s commitment to the population it serves.

**Worksheet 4.6, continued**

**Sample Strategic Plan Formats**  
**Sample Format 3**

**Table of Contents**

**I. Board of Directors**

Contains signatures of the Board of Directors, a “sign-off” of the document.

**II. Introduction**

Describes the purpose of the organization.

**III. Mission**

Defines the mission of the organization.

**IV. Vision**

Defines the vision of the organization.

**V. Operational Concept and History**

Describes the evolution of the organization’s purpose and identity, major accomplishments, and growth milestones. Also includes operational concept graphics.

**VI. Critical Issues and Strategies in the Field**

Describes current issues affecting the organization’s mission and operational concepts.

**VII. Organizational Aims**

Identifies current aims and objectives of the organization.

**VIII. Programs and Goals**

Summarizes each program, the goals of each program, and the activities necessary for accomplishing those goals.

**IX. Organizational Management**

Describes and graphically depicts the structure of the organization.

**X. Appendices**

Contains relevant documentation that enhances understanding of the strategic plan, or data or policies that support program goals and objectives.

**XI. Acronym List**

## **Sample Strategic Plan Formats**

### **Sample Format 4**

#### **Table of Contents**

##### **I. Mission and Vision Statements**

Stand-alone statements; no introductory text is necessary because essentially they introduce and define themselves.

##### **II. The Organization**

Describes the organization's founding, its history, its evolution or continued purpose, and its key successes.

##### **III. Strategies**

Defines strategies in one or two sentences that reflect high-level, long-term approaches (e.g. "Organization Excellence and Revitalization"); each strategy has multiple goals and multiple objectives for each goal.

##### **IV. Program Outcomes**

Highlights successful outcomes from past or ongoing programs.

##### **V. Appendices**

Contains relevant documentation that enhances understanding of the strategic plan, or data that supports program goals and objectives.

**Worksheet 4.6, continued**

## **Your Organization's Strategic Plan Format**

