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