

## Format for a Two-Year Strategic Plan

### I **Mission and Vision**

Articulate the mission and vision of the organization (what is the overall goal, and what will be different in 10 years if the organization is successful)

### II **Core Values**

Articulate the core values of the organization and say a little bit about how they are reflected in this plan.

### III **Goals for the Next Two Years**

Articulate the specific outcomes you anticipate in the coming two years. In this section, the statements should be specific, measurable, action-oriented, resonant with your values, and thrilling, but not detailed (see example below).

I suggest dividing the goals under subheadings. Below are some possible subheadings and examples of goals, as a model.

#### Public Policy

- Propose one new piece of legislation in the 20XX-20XX legislative session (maybe say whatever you know about what it might be).
- Work in coalition with X, Y and Z to support other pieces of legislation consistent with our mission and vision and deemed strategically significant by our board.

#### Public Education

- Sponsor two to four educational programs each year designed to....
- Participate in X# to Y# (type of) events each year, providing...
- Create a speakers bureau, staffed by volunteers, that will give X# to Y# of presentations on.... each year at a wide variety of forums.
- Publish and distribute by mail and/or email four newsletters per year that provide...
- Update our webpage each month with...
- Publish an educational brochure on...

#### Membership

- Hold an annual membership meeting to provides members with the opportunity to ...
- Revise and clarify membership criteria and goals.
- Have a membership of X# by (month) 20XX.
- Have at least X# members participating on committees by (month) 20XX.

### Capacity Building (sometimes called Organizational Development)

- Do a stakeholder analysis and use it to shape our public policy coalitions, our public education work, our membership goals and strategies and our board recruitment process.
- Develop a board orientation packet, board job description and board service agreement.
- Recruit three additional board members year one, and a minimum of two additional members year two, adding to the board capacity in the areas of X, Y and Z.
- Develop a strategic plan that will be used to actively shape the organization's work.
- Use and update as needed the strategic plan, do an annual evaluation of progress and revision.
- Create a board policies and procedures book.
- Create a committee structure and at least two active committees that utilize volunteers beyond the board.
- Hire an administrative assistant.
- Raise an annual budget of \$X in year one and \$Y in year two.
- Create and implement a fundraising plan that includes raising money from foundation grants, event sponsorships and individual donors.

### Program Area X

- Hire two new...
- Create a training process for program volunteers
- [List out specific outcomes you intend to create in this program area]

### Program Area Y

- Secure funding from at least two new foundations for this program area
- Explore a possible partnership with X organization in order to Y.
- [List out specific outcomes you intend to create in this program area]

## **IV Evaluation Process**

Articulate how you will evaluate your progress.

The three sections above constitute what you'd show most new funders and potential partners/collaborators. An abbreviated version might get posted on your website. The section below is largely an internal document.

#### **IV The Nuts and Bolts of How the Goals Will Be Achieved**

This is where you get down to brass tacks and articulate the steps necessary to achieve these goals. For each of your goals, you need to state:

- A brief, outcome-based description (what it will accomplish);
- The timeframe in which it will be done;
- The key dates and deadlines;
- How it will be funded each year;
- What partnerships (if any) are required, or desired, to make it happen;
- Who has primary responsible for making the project happen (a staff person, board member or other volunteer);
- Who will play support roles for the project;
- What the board's role in the project is; and,
- How you will know it has been done, and whether it is successful.

See also the “Strategic Plan Tracking Matrix.” This is one possible format for this section.

#### **Integrating the Plan into the Work of the Organization**

One you have this piece in place – or at least a draft of it – you can use it to develop (or modify) job descriptions for committees and individuals and for the board as a whole. These descriptions should be outcome based (so not, “take care of membership issues” but “recruit at least x new members,” “ensure that phone calls, emails and other inquiries from members are answered within x days/hours,” etc.).

At the board level, review the strategic plan tracking matrix once a quarter, checking on whether you met the goals you set for that quarter, deciding if changes need to be made to reflect new opportunities or challenges that have emerged, and updating it for the coming quarter (keeping the old versions so you can review them as needed later to track progress and evolution). At the end of year one, do a more comprehensive review and evaluation, soliciting input from committees and maybe from members, so you can revise the year-two goals (which now become year-one goals) and setting goals for the new year two. Each year you will decide whether there is any need to revisit the mission and vision or core values sections.

Having this in place should mean that you have most of what you need to write grant proposals and letters soliciting individual donations or event sponsorships, brief potential partners, and respond to questions from funder, partners and others. As you do those things, you will likely create new ideas and language that you will then want to integrate back into the plan.