

STRATEGIC PLAN FRAMEWORK

VISION

A statement of the organization's vision of the desired future, and especially how the organization's work will impact the future.

MISSION

A two or three sentence statement that succinctly states the reason for the organization's existence – who it is, what it does, and who it serves.

VALUES

A statement of the guiding values and philosophies that impact how the organization does its program, strategies, resources, and organizational operations.

STRATEGIC DIRECTIONS

A statement of the general strategic directions toward which the organization wants to move over a given period of time (these are often changes in current direction which will take some time to achieve because of current external barriers or because it involves significant internal change).

GOALS

Clear statements of what the organization wants to accomplish with its programs and with its internal development in a given period of time. Goals fill in the statement... "in five years, the ABC Organization will..." As much as possible, each goal statement uses specific language or measurement of the desired end-result. Although this is often easier for internal goals (fundraising, staffing, development) than it is for external goals, clear articulation of the goals enables an organization to better evaluate and improve its work.

OBJECTIVES

Specific steps that will be taken to help the organization reach its stated goals. Objectives are often laid out on a quarterly or every 6-month timeline, and may include the "who" will be responsible for accomplishing that step.

GUIDELINES FOR OPERATING

These guidelines clarify roles and decision-making processes that will aid in the implementation of the plan, including on-going choices that will present themselves.

IMPLEMENTATION AND EVALUATION PLAN

An outline of the process for implementing, and periodically evaluating and adjusting the plan. How will the organization integrate the plan into the way it operates? When will the major check-in points, and who will be involved in evaluating what has been learned, and what will change in the future plans?

ADDITIONAL PIECES

For either internal or external purposes, you may wish to have a document put the following pieces in one place. This includes the rationale for how the major decisions and pieces of the plan were guided, as well as the background thinking that went into the final product. Some of the pieces that the organization might include:

The organization's origins and history – how did it begin, what got it to this place, and why it undertook this planning effort at this stage of its development

Key accomplishments – a brief summary of the most important accomplishments and the specific outcomes realized to date

Assets and resources -- what are the current core capacities, the abilities of the staff and board, the relationships and the financial resources that the organization can draw upon as it moves forward

Summary of “external environment” factors -- what factors in the external environment are most influencing the choices of strategic direction, a sense of the current challenges around issues (could draw heavily from the Key Trends data generated in the interviews)

New directions -- how the new Vision, Mission, Values and Goals are an evolution from, and different than, the organization's current and past work

Constituency clarified -- a deeper exploration of why, what, and who the organization intends to serve through the updated Vision, Mission, Values and Goals

Key markers or milestones -- overview of the major pieces of the Objectives, how and when those transitions will occur, and/or more detail of key milestones or anticipated decision points in the future (this is especially useful in helping board and staff have the “big somethings” against which to measure progress); sometimes this is useful as a summary, or sometimes a graphic timeline or chart can be especially helpful.