

Your Nonprofit Organization

Strategic Plan

(2020-2023)

1. STRATEGIC PLAN OVERVIEW

A. Mission Statement

B. Vision Statement

C. Statement of Impact

D. Executive Summary

The Board of Directors and staff are pleased to present the following Strategic Plan to the community. The plan represents ## months of work by the Board, input from a wide cross section of the community, and countless hours of dedicated service from the staff.

Nonprofit organization is committed to serving (insert needs addressed). Our agency's primary goals are to:

In order to achieve our mission and goals during the next three years, we will focus on # (no more than five) strategic directions:

(What)

- 1. Where do you want to be in three years?**
- 2. Where do you want to be in three years?**
- 3. Where do you want to be in three years?**

Based on the initiatives and key activities, the organization will target our efforts by:

(How)

- 1. Describe solution for initiative #1**
- 2. Describe solution for initiative #2**
- 3. Describe solution for initiative #3**

The Board of Directors and staff at nonprofit organization are committed to achieving the goals of this Strategic Plan as it will enable us to better meet the needs of (insert location served).

High Level Forecast:

Insert Key Benchmarks

2. SITUATION ASSESSMENT

A. External Scan

Service Fields

Trends in service or cause area

Economic Climate

Example: Local economy is strong and unemployment rates are down.

Personal Economic Climate

Example: Cost of health care are rising

Political Climate

National

Example: Federal budget cuts proposed on programs serving the poor.

State

Budget surplus has created a great deal of competition for funding

County

All three levels of government are focusing on chronic homelessness.

Demographic Trends

Example:

- *Senior population is increasing.*
- *Rural areas are isolated from primary services.*
- *Lack of affordable housing in rural areas causes more individuals to move to more populated areas.*

Peers in Service or Competitive Analysis

Public Awareness Assessment

B. Internal Scan

Strengths

Weaknesses

Top Challenges and Opportunities

Challenges

1. *Example: Staff training, salaries, benefits and retention.*
- 2.
- 3.

Opportunities

1. *Example: Public relations and name recognition as service leader*
- 2.
- 3.

3. STRATEGIC INITIATIVES

A. Strategic Initiative Options

Brainstorm list of potential solutions/initiatives needed most. Allow team to vote on level of importance. Aggregate rankings and summarize below.

Strategic Options	Importance Rank 1 =Low to 5 =High				
	1	2	3	4	5
Expanded Services 1. 2. 3.					
Brand Awareness and Communications 1. 2. 3.					
Impact 1. 2. 3.					
Fundraising/Income 1. 2. 3.					
Human Resources 1. 2. 3.					

B. Strategic Plan Initiative Summary

(summarize top ranked or selected solutions)

Key Elements of the Strategy

(describe each selected strategy)

- 1.
- 2.
- 3.
- 4.
- 5.

Strategic Initiatives and Action Plan Summary

Strategy	Strategic Initiatives
1. Strategy #1	Bullet one Bullet two Bullet three
2. Strategy #2	Bullet one Bullet two Bullet three
3. Strategy #3	Bullet one Bullet two Bullet three
4. Strategy #4	Bullet one Bullet two Bullet three
5. Strategy #5	Bullet one Bullet two Bullet three

C. Initiative Plans (Detailed)

Complete One chart for each initiative

Strategy	Strategy #1		
Strategic Initiative	Increase Volunteer Engagement		
Initiative Manager	<i>Who has accountability?</i>	Initiative Team	<i>Who has responsibility?</i>
Major Activities	Year 2020	Year 2021	Year 2023
	What is to be accomplished in year one?	What is to be accomplished in year two?	What is to be accomplished in year three?
Strategic Initiative Performance Metrics	Year 2020	Year 2021	Year 2023
Increased numbers of volunteers Baseline: 250 volunteers	300 volunteers	321 volunteers	352 volunteers
Increased number of volunteer hours Baseline:			

4. STRATEGIC PLAN BUDGET

(Forecasted growth to operating budget)

Nonprofit Organization Operating Budget	Current Year Projected	Year One	Year Two	Year Three
Income				
Foundation Giving				
Corporate Giving				
Individual Giving				
Government				
Earned Income/Fee for Service				
Other Operating Income				
Total Income				
Expenses				
Wages & Benefits				
Operating Expenses				
Interest Expense				
Total Expenses				
Net Operating Income				

6. STRATEGIC INITIATIVE COST PROJECTIONS

	Current Year Projected	Year 2020	Year 2021	Year 2023
Initiative #1 Expense				
Item		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
Initiative #2 Expense				
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
Initiative #3 Expense				
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
Initiative #4 Expense				
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

5. STRATEGIC FUND PLAN

A. Fundraising Summary

Indicators	2020	% Change	2021	% Change	2022	% Change	2023
Total Cash Contributions	\$		\$		\$		\$
Individuals	\$		\$		\$		\$
Foundations	\$		\$		\$		\$
Corporations	\$		\$		\$		\$
Events	\$		\$		\$		\$
In-Kind Contributions	\$		\$		\$		\$
Volunteer Hours							
Board Giving Total And % Giving							
Number of Donors (Unduplicated)							
Number of First-Time Donors							
Donor Retention Rate							
Cost per dollar raised							

B. Strategic Fundraising Plan (detailed)

What will you do to raise the additional income needed to achieve initiatives? These activities should be incorporated into annual operating plans for 2020-2023

Goal: Staff Development and Capacity Building

Outcome Desired	Key Steps	Person Responsible	Resources Needed	Completion Date

Goal: Case for Support – Messaging

Outcome Desired	Key Steps	Person Responsible	Resources Needed	Completion Date

Goal: Identification

Outcome Desired	Key Steps	Person Responsible	Resources Needed	Completion Date

Goal: Cultivation

Outcome Desired	Key Steps	Person Responsible	Resources Needed	Completion Date

Goal: Solicitation

Outcome Desired	Key Steps	Person Responsible	Resources Needed	Completion Date

Goal: Recognition, Retention and Stewardship

Outcome Desired	Key Steps	Person Responsible	Resources Needed	Completion Date