



betterworld

Operations:
Basic Strategic Planning
Template for Nonprofits

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I. Executive Summary

A high-level overview of the strategic plan, summarizing the nonprofit's mission, vision, core values, and key goals. This section provides a snapshot of what the organization aims to achieve through the strategic plan.

- **Mission Statement:** Clearly state your nonprofit's mission.
 - **Vision Statement:** What long-term impact do you aim to create?
 - **Core Values:** Define the guiding principles and values of your organization.
 - **Overview:** Brief description of your goals for this strategic plan.
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II. Situation Analysis

This section evaluates the current environment in which the nonprofit operates. The SWOT analysis identifies strengths, weaknesses, opportunities, and risks. The SOAR analysis identifies Strengths, Opportunities, Aspirations, and Results. Both aid in setting realistic goals and strategies. Choose the analysis that works best for your organization.

Option 1: SWOT Analysis

A common strategic tool to assess internal strengths and weaknesses along with external opportunities and threats.

- **Strengths:** Internal strengths that can be leveraged.
- **Weaknesses:** Areas for internal improvement.
- **Opportunities:** External trends or developments to capitalize on.
- **Threats:** External challenges or risks.

Option 2: SOAR Analysis

A strengths-based alternative that focuses on positive aspects, future aspirations, and measurable outcomes.

- **Strengths:** What does your organization do well?
- **Opportunities:** What possibilities exist to grow and innovate?
- **Aspirations:** What is your desired future?
- **Results:** What measurable outcomes will define success?

Needs Assessment

Identify community or issue-specific needs that your nonprofit addresses.

Stakeholder Input

Summarize feedback from key stakeholders such as staff, volunteers, donors, and beneficiaries.

III. Strategic Goals & Objectives

Outlines the organization's key goals and the specific, measurable objectives needed to achieve them. Each goal should align with the nonprofit's mission and vision.

Goal 1:

- Objective 1.1
- Objective 1.2
- Timeline: _____
- Responsible Party: _____
- Key Metrics: _____

Goal 2:

- Objective 1.1
 - Objective 1.2
 - Timeline: _____
 - Responsible Party: _____
 - Key Metrics: _____
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IV. Strategies & Action Plans

This section details how the organization will achieve its goals. Action steps include specific tasks, timelines, assigned responsibilities, required resources, and progress indicators to measure success.

- **Strategies:** Outline the broad approach to achieving each goal.
 - **Action Steps:**
 - Task: _____
 - Assigned to: _____
 - Timeline: _____
 - Resources Needed: _____
 - Progress Indicators: _____
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V. Organizational Capacity & Structure

Evaluates the nonprofit's internal capacity to execute the plan. It covers staffing, leadership roles, technology needs, and plans to develop the board of directors.

- **Current Staff & Leadership:** Outline roles and responsibilities.
- **Future Hiring Needs:** Identify future personnel needs, if applicable.
- **Technology & Tools:** Identify software or technology upgrades needed to support the plan.
- **Board Development:** Outline plans to engage and develop the board of directors.

VI. Financial Planning & Sustainability

Provides a financial overview, including a budget forecast, revenue streams, and a plan for sustainable fundraising. This section ensures the organization has the resources to meet its goals and includes a contingency plan for financial risks.

- **Budget Forecast:** High-level budget aligned with strategic priorities.
 - **Revenue Streams:**
 - Grants
 - Donations
 - Fundraising Events
 - Earned Income
 - **Fundraising Plan:** Strategies to meet financial goals.
 - **Contingency Plan:** Approach to managing potential financial shortfalls.
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VII. Marketing & Communications Plan

Defines the nonprofit's brand, target audiences, and messaging strategies. It also identifies communication channels and timelines for outreach campaigns to promote the organization and its initiatives.

- **Brand Strategy:** Define your brand identity and positioning.
 - **Target Audiences:** Identify key audiences (i.e., donors, beneficiaries, volunteers).
 - **Key Messages:** Core messages that resonate with each audience.
 - **Channels:** Outline communication channels (website, social media, email, etc.).
 - **Campaigns & Timeline:** Schedule of major campaigns.
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VIII. Monitoring & Evaluation

Establishes how the organization will track progress toward its goals. It includes key metrics, a reporting process, and schedules for regular evaluation. This section ensures continuous improvement through data-driven insights.

- **Performance Metrics:** Key metrics to measure progress toward each goal.
- **Evaluation Frequency:** Define when progress will be reviewed (monthly, quarterly, annually).
- **Reports:** Outline reporting process and who will receive reports.
- **Continuous Improvement:** Describe how the organization will use insights to adjust strategies.

IX. Risk Management Plan

Identifies potential risks (financial, operational, reputational) and outlines strategies to mitigate them. A crisis management plan is also included to prepare for unexpected events.

- **Risk Identification:** Identify potential risks.
 - **Mitigation Strategies:** Describe how risks will be managed.
 - **Crisis Management Plan:** Outline steps for managing unexpected crises.
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X. Conclusion & Next Steps

Summarizes the strategic plan's final steps, including approval by the board, communication to stakeholders, and timelines for reviewing and updating the plan in the future.

- **Board Approval:** Date for board review and approval of the strategic plan.
- **Launch Plan:** How the plan will be communicated to stakeholders.
- **Next Review:** Set the timeline for the next strategic planning process.