

WRITING A STRATEGIC PLAN

WHAT IS IT?

This is a document to capture the organisation's strategy. Strategic plans can be given different names, but they will include the following characteristics:

- usually cover a planning period of three to five years
- often summarised in an executive summary
- will have a 'budget' of funding strategy attached, which will show the resources required to fulfil the plan, at a high level
- the first year of the plan may be covered in more detail in an 'annual operating plan', with detailed budgets.

WHY SHOULD YOU USE IT?

BENEFITS: Everyone gets a consistent view of what needs to happen and why.

LIMITATIONS: It's easy for a plan become the end itself, rather than the means to the end.

WHEN SHOULD YOU USE IT?

Once the analysis and choice of strategic options has been made, and the future direction is known.

HOW TO USE THE GUIDE

Use the headings in the table as a guide to structuring your plan contents; collect and sort the analysis generated so far in your strategic planning tasks.

EXECUTIVE SUMMARY

A summary of the plan – you may wish to make this summary something you can promote outside the organisation, to build support and keep stakeholders informed.

INTRODUCTION

The purpose of the plan; background about where the organisation is in its development; brief statistics about numbers of staff/volunteers; a description of service users (snapshot)

PURPOSE

Cover the (new) mission, vision and values of the organisation – this is the backdrop for the plan; say how you use the important statements

DRAWING FROM THE PAST

Set out learning from the past – about beneficiary need, about your organisation's performance, what you must continue to do; set some context for the plan

FUTURE POTENTIAL

Outline what challengers are for the future (external opportunities, threats, other player potential, stakeholder needs, etc.); outline your fitness to face the future (the results of your internal environment analysis).

STRATEGIC OBJECTIVES FOR THE NEXT THREE YEARS

Cover the main areas of work the organisation needs to focus on for the next three years – each objective should have key tasks and outcome measure associated with it, from which you can develop annual goals, and teams and individuals can develop their work plans.

DELIVERING THE PLAN AND TIMETABLE

This is where you need to be convincing about the organisation's ability to resource the plan – outline the high level activities over the period; attach a budget and a timetable to show when and how the strategic objectives will be met (covering all of the main areas of work of the organisation).