

A Strategic Plan Framework: Populating the Plan (8 page Plan)

Plan main headings	Purpose of section	Possible sub sections	Possible sources of content ¹ (Pick'n Mix) NB an iterative process of consultation & involvement activities
1. Purpose	Make a clear statement about the reason the organisation exists; the difference you make; distinctiveness.	<ul style="list-style-type: none"> • Mission, vision values; public benefit • Short contextual piece about the sector in which the organisation operates 	Constitution Mission, Vision, Values tool Post it workshops
2. Drawing from the past	Be clear about what must continue, past achievements and learning: facing the future with pride in the past.	<ul style="list-style-type: none"> • What we must continue to do and why • Our learning from the past: about need, about ourselves, our performance (inc what we must do differently – use client feedback) 	Review of previous period against plan Review of achievements Beneficiary research
3. Considering the future	Explore the world the organisation will be facing in the future. With the Mission and Vision as backdrop and context.	<ul style="list-style-type: none"> • Beneficiary needs • External environment analysis (drivers, other player activity) • Internal environment analysis (fitness to face future) • Future funding map • Level of ambition & approach to risk 	Scenario planning Consultation – visioning sessions PEST SWOT, skills audit, Capacity assessment, Internal health-check Stakeholder analysis Other Player Analysis, Strategic group mapping Funder priorities analysis/funding opportunities analysis Benchmarking
4. Strategic aims, objectives and Scorecard	Make a clear statement about the organisation's priorities for the forthcoming period, given the analysis of what has gone on in the past, and what is needed for the future.	<ul style="list-style-type: none"> • High level aims with objectives for each • Measures defining what the organisation wants to deliver • Strategies to deliver quality assurance 	Gap analysis Resource analysis Matrix of options/decisions Cost benefit analysis Break even analysis Balanced scorecard development
5. Delivering the goals	Explain the key activities required by the organisation to deliver the strategy. Give confidence to the reader that the organisation has thought through the 'what' and 'how' to deliver the strategy.	<ul style="list-style-type: none"> • Factors critical to success (the things we have to do well) & outcome measures • High level activities (over each of the years in the plan period; strategic staircase – as an appendix) • Comms plan for engagement • Risk and impact analysis • Resourcing the plan: high level funding and financing – high level budget as an appendix 	Risk analysis Impact analysis Staff consultation/activity workshops Financial modelling/forecasting, Financial planning Funding planning, by sources Investment needs analysis Strategy map Individual performance management planning Monitoring and review plans
Appendices	Detailed material that some readers may be interested in.	<ul style="list-style-type: none"> • High level Gantt • High level P&L/budget 	

See more at <http://www.knowhownonprofit.org/organisation/strategy/plan>

¹ Adapted from group work by Cass CCE MSc students on the Charity Degree programme, September 2008 and from course participants on the 2009 series of Strategic planning for Executive Teams (run for acevo by Caroline Copeman, Cass CCE)