**[A green sign with white text

Description automatically generated](https://www.smartsheet.com/try-it?trp=12043&utm_source=template-word&utm_medium=content&utm_campaign=Nonprofit+Strategic+Plan-word-12043&lpa=Nonprofit+Strategic+Plan+word+12043)NONPROFIT STRATEGIC PLAN   
TEMPLATE for Microsoft Word**

|  |  |
| --- | --- |
| **LEGAL NAME AND ADDRESS** |  |
| **TIME PERIOD IN EXISTENCE** |  |
| **LEGAL STATUS OF ORGANIZATION** |  |
| **STAFFING PROFILE AND STRUCTURE** |  |
| **NEEDS SERVED / IMPORTANCE** |  |
| **NEEDS SERVED STATUS** |  |
| **GEOGRAPHIC REGION SERVED** |  |
| **TARGET AUDIENCE** |  |
| **SUCCESSES OF PAST YEAR** |  |
| **ANTICIPATED CHALLENGES** |  |

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| VISION | | | |
| Envision the ideal result of the work of the organization. | | | |
| MISSION | | | |
| Provide a focused description of the organization's purpose. | | | |
| VALUES | | | |
| *Choose 10 of the values listed (or your own additions) and write a sentence for each value, describing how it guides your business and helps the organization achieve its vision and mission.* | | | |
| | Integrity | Teamwork | Partnership | Honesty | Communication | Respect | Safety | Attitude | Customer Service | Trustworthiness | Diversity | Individuality | Creativity | Growth | Achievement | Competence | Accountability | Community | Quality | Commitment to Success | Ethics | Lawfulness | Professionalism | Fairness | Responsibility | Consistency | Empowerment | Fun | Risk-Taking | Efficiency | Balance | Loyalty | Optimism | Reliability | Inspiration | | | | |
| **VALUE 1** | Description | **VALUE 6** | Description |
| **VALUE 2** | Description | **VALUE 7** | Description |
| **VALUE 3** | Description | **VALUE 8** | Description |
| **VALUE 4** | Description | **VALUE 9** | Description |
| **VALUE 5** | Description | **VALUE 10** | Description |

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| --- | --- | --- | --- |
| MEMBERSHIP / AUDIENCE / DEMOGRAPHIC | | | |
| WHO WE SERVE | Description | | |
| MARKETING AND COMMUNICATION PLAN | Description | | |
| SMART OBJECTIVES | | | |
| *List three to five objectives that are specific, measurable, achievable, realistic, and time-bound.* | | | |
| 1. Objective | | WHAT THE AUDIENCE NEEDS TO HEAR |  |
| 2. Objective | | THE BEST WAY TO REACH AND COMMUNICATE |  |
| 3. Objective | | THE COMMUNICATION SCHEDULE AND FREQUENCY |  |
| 4. Objective | | HOW TO MEASURE THE REACH OF THE MESSAGE |  |
| 5. Objective | | ADDITIONAL COMMENTS |  |

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| PEOPLE DEVELOPMENT PLAN | | | |
| *Assess the needs and growth potential of your staff, volunteers, board, and managers.* | | | |
| AREA OF NEEDED DEVELOPMENT |  | AREA OF NEEDED DEVELOPMENT |  |
| FINANCIAL PROJECTIONS |  | FINANCIAL PROJECTIONS |  |
| DEADLINES |  | DEADLINES |  |
| TIME AND FINANCIAL COST |  | TIME AND FINANCIAL COST |  |
| DEVELOPMENT SUMMARY |  | DEVELOPMENT SUMMARY |  |

OPERATING AND BUDGET ESTIMATE

TOTALS

|  |  |  |
| --- | --- | --- |
| **TOTAL EXPENDITURE** | **$0** | **$0** |
| **(Income - Total Expenditure) TOTAL PROFIT / LOSS** | **$0** | **$0** |

BREAKDOWN

|  |  |  |  |
| --- | --- | --- | --- |
| PROJECTED  INCOME | CATEGORY | ESTIMATED AMOUNT | ACTUAL AMOUNT |
| Grants | $0 | $0 |
| Donations |  |  |
| Fundraising |  |  |
| Interest |  |  |
| Other Income |  |  |
| TOTAL | $0 | $0 |

|  |  |  |  |
| --- | --- | --- | --- |
| PROJECTED  EXPENDITURE | CATEGORY | ESTIMATED AMOUNT | ACTUAL AMOUNT |
| Staffing Costs | $0 | $0 |
| Overhead |  |  |
| Equipment |  |  |
| Marketing |  |  |
| Staff Development |  |  |
| Mileage |  |  |
| Other Costs |  |  |
| TOTAL | $0 | $0 |

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| --- | --- | --- | --- |
| OBJECTIVE 1 PROGRAMMING / PROJECT COSTS | CATEGORY | ESTIMATED AMOUNT | ACTUAL AMOUNT |
|  | $0 | $0 |
|  |  |  |
|  |  |  |
|  |  |  |
| TOTAL | $0 | $0 |

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| --- | --- | --- | --- |
| OBJECTIVE 1 PROGRAMMING / PROJECT COSTS | CATEGORY | ESTIMATED AMOUNT | ACTUAL AMOUNT |
|  | $0 | $0 |
|  |  |  |
|  |  |  |
|  |  |  |
| TOTAL | $0 | $0 |

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| SITUATIONAL ANALYSIS (SWOT) | | | | |
|  | STRENGTHS ( + ) |  | WEAKNESSES ( – ) |
| INTERNAL  FACTORS |  | INTERNAL  FACTORS |  |
|  |  |  |  |
|  | OPPORTUNITIES ( + ) |  | THREATS ( – ) |
| EXTERNAL  FACTORS |  | EXTERNAL  FACTORS |  |

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| RISK ANALYSIS | | |
| *Identify the risks; detail the controls in place; and list the team members responsible.* | | |
| RISK | CONTROLS IN PLACE | TEAM MEMBER RESPONSIBLE |
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| MEASUREMENTS OF SUCCESS | | |
| MEASURABLE COMPONENT DESCRIPTION | WHEN TO MEASURE | HOW TO MEASURE |
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| MANAGEMENT PLAN | | |
| HOW COMPONENTS WILL BE ASSESSED | HOW OFTEN TO ASSESS | WHO WILL ASSESS |
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| ACTION PLAN | | | |
| QUARTER ONE | MM/DD/YY - MM/DD/YY | | |
| **BEGIN AND END DATES** | **ACTION** | **RELATED OBJECTIVES** | **RESOURCES - COST, TIME, TEAM MEMBERS** |
|  |  |  |  |
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| QUARTER TWO | MM/DD/YY - MM/DD/YY | | |
| **BEGIN AND END DATES** | **ACTION** | **RELATED OBJECTIVES** | **RESOURCES - COST, TIME, TEAM MEMBERS** |
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| --- | --- | --- | --- |
| QUARTER THREE | MM/DD/YY - MM/DD/YY | | |
| **BEGIN AND END DATES** | **ACTION** | **RELATED OBJECTIVES** | **RESOURCES - COST, TIME, TEAM MEMBERS** |
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| QUARTER FOUR | MM/DD/YY - MM/DD/YY | | |
| **BEGIN AND END DATES** | **ACTION** | **RELATED OBJECTIVES** | **RESOURCES - COST, TIME, TEAM MEMBERS** |
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