



How to Ensure Your Strategic Plan Document is Complete

This form assumes that you have been using the conventional model of strategic planning. If you chose a different model, for example, issues-based, organic planning and alignment models, then you might skip certain components (rows) in the following table.

Look at each component and ask yourself, “If another person was reading my Plan, would he/she easily find that component in my Plan?” Then think about the quality of your planning that produced that component, for example, was adequate research needed, but not done? Should your Board have been more involved? Employees more involved? Stakeholders more involved? If work is needed, then check “N/W.”

Element	Description	No	N/W	Yes
Strategic Information Regarding Your Entire Organization				
Executive Summary	Describes the purpose of your Strategic Plan document, time span of your Plan, overall strategic priorities identified during planning, and who will ensure that your Plan is implemented			
Mission	Describes the purpose of your organization, eg, “We exist to ...”			
Values (optional)	Specifies what’s important, overall, in how you work			
Vision (optional)	Describes your customers and organization at some time in future			
External analysis	Makes verifiable conclusions about what outside influences might affect your organization and how, especially regarding your stakeholders (customers, investors/funders, social trends, etc.)			
Internal analysis	Makes verifiable conclusions about the quality of what’s going on inside your organization, eg, quality of Board operations, staffing, products, marketing, finances, evaluation, etc.			
Priorities (or Strategies, Goals or Issues)	Includes major, measurable accomplishments regarding your 1) customers and 2) organization; these are clearly aligned with, and addresses, priorities from external and internal analyses			
Strategies (optional)	Associates at least two major methods to address each priority			
Financials / budgets	Includes a budget, at least for the first year of your Plan			
Action Plans to Achieve Each Strategic Goal (these might be in a separate Operational Plan)				
Objectives	Includes specific, measurable activities to address each priority			
Responsibilities	Specifies what role, or who, will achieve each objective			
Timelines	Includes deadlines for achieving each objective			
Resources	Specifies what people, money, facilities, etc., are needed to achieve each objective			
Management of Your Strategic Plan Document				
Authorization page	Describes how your Strategic Plan becomes official			
Communications plan	Explains how your Plan is conveyed to stakeholders			
Planning process	Describes the strategic planning model used to produced your Plan			
Monitoring	Lists who will regularly ensure that your Plan is implemented			
Change procedure	Explains how your Plan will be changed systematically as needed			