

ADAPTABLE STRATEGIC PLANNING DOCUMENT FOR NON-PROFITS:
ELEMENTS TOWARD FUNDRAISING ACCOUNTABILITY

ANNUAL REVIEW AND UPDATING AS REQUIRED:

MANDATE *the "musts:" legislation, ordinances, charters, articles, by-laws*

MISSION *raison d'être: social justification for organization's existence;
purpose; inspiration (include articulated community needs).*

STAKEHOLDER(S) IDENTIFICATION *with individual missions identified*

VISION OF SUCCESS *brief idealized scenario of the future*

MANAGEMENT ROLES AND RESPONSIBILITIES

Board
Advisors
Staff
Volunteers

ORGANIZATIONAL GOALS (aims) & OBJECTIVES (specific actions or results)

PRODUCTS, PROGRAMS & SERVICES

ORGANIZATIONAL ACCOUNTABILITY *quantifiable benchmarks*

ANNUAL PLANNING:

FINANCIAL PICTURE *3 years back; present budget; future scenario; special strategies*

SWOT ANALYSIS

ENVIRONMENTAL THREATS *(POLITICAL, ECONOMIC, SOCIAL, TECHNOLOGICAL)*

ENVIRONMENTAL OPPORTUNITIES *(PESTS)*

INTERNAL STRENGTHS

INTERNAL WEAKNESSES

STRATEGIC ISSUES *(ordered regarding priority, logic or time factors)*

*"fundamental policy questions/choices which affect your organization's
mandates; mission; values; product, program, or service level and mix;
clients; costs; financing; organization or management."*

PRIORITIZED STRATEGIES, ACTIONS, RESPONSIBILITIES, & TIME COMMITMENTS

Strategic Business Plan Checklist

Title Page

Table of Contents

- Organizational Profile
- Contact Information
- Mission
- Values
- Artistic Vision, Interpretation Plan
- History and Track Record
- Strategic Challenges and Objectives/Goals and Strategies

- Marketing Plan
 - Market Facts and Trends
 - Target Audience, Location
 - Products, Programs and Services
 - Competition
 - Unique Position in the Marketplace, Brand
 - Price
 - Communications and Promotions

- Human Resources

- Production and Operating Requirements

- Financial and Revenue Generation

- Evaluation and Performance Measures

Appendix

- Budget
- Implementation Plan