**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=8658&utm_source=template-word&utm_medium=content&utm_campaign=Nonprofit+Strategic+Plan+Example-word-8658&lpa=Nonprofit+Strategic+Plan+Example+word+8658)NonProfit Strategic Plan   
Template Example**

Nonprofit Organization Name

STRATEGIC PLAN

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PREPARED BY

Author Name

DATE PREPARED

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Version

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# BACKGROUND

## Legal Name and Address

|  |
| --- |
|  |

## Time Period in Existence

|  |
| --- |
|  |

## Needs Served / Importance

|  |
| --- |
|  |

## Geographic Region Served

|  |
| --- |
|  |

## Target Audience

|  |
| --- |
|  |

## Successes of Past Year

|  |
| --- |
|  |

## Anticipated Challenges

|  |
| --- |
|  |

# VISION

|  |
| --- |
| Envision the ideal result of the work of the organization |

# MISSION

|  |
| --- |
| A focused description of the organization's purpose |

# WHO WE SERVE

|  |
| --- |
| Membership / Audience Demographic |

# MARKETING & COMMUNICATIONS PLAN

|  |
| --- |
|  |

# VALUES

Choose ten of the values listed below or your own additions and write a sentence for each describing how this value guides your business and helps the organization achieve its vision and mission.

|  |  |  |  |
| --- | --- | --- | --- |
| • Integrity | • Trustworthiness | • Quality | • Fun |
| • Teamwork | • Diversity | • Commitment to Success | • Risk-Taking |
| • Partnership | • Individuality | • Ethics | • Efficiency |
| • Honesty | • Creativity | • Lawfulness | • Balance |
| • Communication | • Growth | • Professionalism | • Loyalty |
| • Respect | • Achievement | • Fairness | • Optimism |
| • Safety | • Competence | • Responsibility | • Reliability |
| • Attitude | • Accountability | • Consistency | • Inspiration |
| • Customer Service | • Community | • Empowerment |  |

|  |  |  |
| --- | --- | --- |
| 1 | Value One | Sentence One |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 10 |  |  |

# OPERATING BUDGET ESTIMATE

## PROJECTED INCOME

|  |  |  |
| --- | --- | --- |
|  | ESTIMATED AMOUNT | ACTUAL AMOUNT |
| Grants | 10,000 | 5,000 |
| Donations | 4,000 | 1,000 |
| Fundraising | 10,000 | 20,000 |
| Interest | 1,000 | 2,000 |
| Other Income | 1,000 | 0 |
| TOTAL | 26,000 | 28,000 |

## PROJECTED EXPENDITURE

|  |  |  |
| --- | --- | --- |
|  | ESTIMATED AMOUNT | ACTUAL AMOUNT |
| Staffing Costs | 1,000 | 1,000 |
| Office / Overhead | 1,000 | 1,000 |
| Supplies / Equipment | 1,000 | 2,000 |
| Marketing | 1,000 | 2,000 |
| Staff Development | 1,000 | 2,000 |
| Mileage | 1,000 | 0 |
| TOTAL | 7,000 | 9,000 |

## TOTAL PROFIT / LOSS

|  |  |  |
| --- | --- | --- |
|  | ESTIMATED | ACTUAL |
| ( Income – Expenditure ) | 19,000 | 19,000 |

# SITUATIONAL ANALYSIS (SWOT)

* Opportunity One
* Opportunity Two
* Opportunity Three
* Opportunity Four
* Threat One
* Threat Two
* Threat Three
* Strength One
* Strength Two
* Strength Three
* Strength Four
* Weakness One
* Weakness Two
* Weakness Three

# SMART OBJECTIVES

S-Specific, M-Measurable, A-Achievable, R-Realistic, T-Timebound

List 3 to 5

|  |  |
| --- | --- |
| 1 | Objective One |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

|  |  |
| --- | --- |
| WHAT THE AUDIENCE NEEDS TO HEAR |  |
| BEST WAY TO REACH & COMMUNICATE |  |
| COMMUNICATION SCHEDULE & FREQUENCY |  |
| HOW TO MEASURE MESSAGE REACH |  |
| ADDITIONAL COMMENTS |  |

# MEASUREMENTS OF SUCCESS

|  |  |  |
| --- | --- | --- |
| MEASURABLE COMPONENT DESCRIPTION | WHEN TO MEASURE | HOW TO MEASURE |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# ACTION PLANS

## YEAR ONE – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## YEAR TWO – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## YEAR THREE – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## YEAR FOUR – 20XX

|  |  |  |  |
| --- | --- | --- | --- |
| BEGIN & END DATES | ACTION | RELATED OBJECTIVES | RESOURCES: Cost, Time, Team Members |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |
| --- |
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