# Non-Profit Strategic Plan Template

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## Executive Summary

As the heading implies it is a summary of the entire plan and is prepared after the complete plan document has been drawn up. It gives stakeholders, advisors and staff brief information on what the organization is currently doing and what it is up to in the coming period.

## Vision and Mission Statement

A Vision statement tells the whole world “what” the NPO wants to achieve and for what purpose it is in existence.

A Mission statement clarifies “how” the NPO wants to achieve its Vision. It sets the boundaries within which employees can decide and act towards achieving results and also informs third parties like investors, vendors, customers, and clients dealing with the organization what the NPO expects from them.

## Values

As a non-profit organization, an NPO has to approach government and non-government entities for aid and donations to fund their activities and also approach the community for support to their service. Such entities would donate and support only if the NPO has strong goodwill and reputed name.

To ensure this, any non-profit organization has to have a work culture based on good values, which are listed as part of the strategic plan to remind all internal staff and external stakeholders the values recognized and adhered by the NPO.

Values respected by a typical NPO would include qualities such as integrity, trustworthiness, honesty, transparency, teamwork, and accountability.

## Campaigning the Cause

Marketing. The NPO has to sell its laudable cause, purpose and the change it wants to bring about through its service to governments, foundations, philanthropic entities and individuals to obtain grants and raise funds.

In a for-profit organization, marketing function brings in the revenues for the organization without which the organization will not survive. In an NPO, the cause and purpose are sold as a noble concept to governments and foundations that give grants to NPOs. Similar to any marketing activity, the NPO should plan its campaign of conveying its message to such entities and convincing them to make grants in its favor.

This section details exhaustively everything an NPO has to do to raise the targeted funds, leaving no stone unturned, including the message, whom to approach, how to approach and grant seeking methodologies.

## Goals and Tasks

In setting goals, NPO management should follow the SMART rule, where goals set are Specific, Measurable, Attainable, Realistic and Timely. When the plan period is 3 to 5 years, long-term goals can be broken down to annual goals under the SMART rule and any shortcoming in one year can be made good in the subsequent plan year.

At this section, list all the goals and targets to be achieved by the NPO. It informs everyone in the organization what the NPO is planning to achieve in the current plan period and in the period immediately following.

## Key Performance Indicators

To deploy resources efficiently, the strategic plan identifies and sets benchmarks as key performance indicators that would be used to measure and show how efficiently the NPO activities have been conducted during the plan period.

As the very name implies, Key Performance Indicator (KPI) is a measure that tells how efficiently a key activity has been performed.

Key activities that determine the success of an organization are listed and measured periodically to find how efficiently the organization is functioning.

## Human Resources

The strategic plan has to detail existing human resources, additional manpower needed to execute targets set, training needs of staff, authority and accountability in performing various tasks and empowerment to take decisions in the right time. The plan should also clearly define the organization hierarchy such that operational issues are properly escalated and solved in right time without wastage of resources.

## SWOT Analysis

An NPO has to do a SWOT analysis to overcome weaknesses and threats with its strengths and opportunities. For a typical NPO, its people and/or cause could be a strength, its size or age could be a weakness, lack of competition could be an opportunity and economic upheavals could be a threat.

The SWOT Analysis includes not only the listings of strengths, weaknesses, opportunities, and threats but also how they are going to be managed. The NPO should plan how it is going to use its strengths to increase its activities in raising more funds to serve more beneficiaries, how it is going to overcome its weaknesses, how it is going to use opportunities to expand its activities and what steps it is going to take to meet a threat.

## Risk Analysis

Most of the activities of an NPO are dependent on environmental or outside factors beyond the control of the NPO, having an inbuilt element of risk while being performed. Hence an NPO having defined its goals and targets should identify possible risks that may arise while executing the strategic plan to achieve the goals. After listing the risks, an NPO should detail how it is going to avoid and manage the risk if it occurs.

## Financial Projections

The strategic plan is to be quantified to monitor performance and evaluate results achieved. A Financial Projection of revenues and expenses is to be drawn up for the current period and the plan period. Generally, it is a three year period for which projections are made to be as realistic as possible. For the immediate current period, the annual plan is broken down into monthly or quarterly plan for effective monitoring of actual performance and timely correction of deviations. In an NPO where profit is not the motive, Financial Projections fix expense budgets to be within allocated resources for various activities. An NPO Financial Projection also forecasts grants to be received and funds to be raised during the plan period.