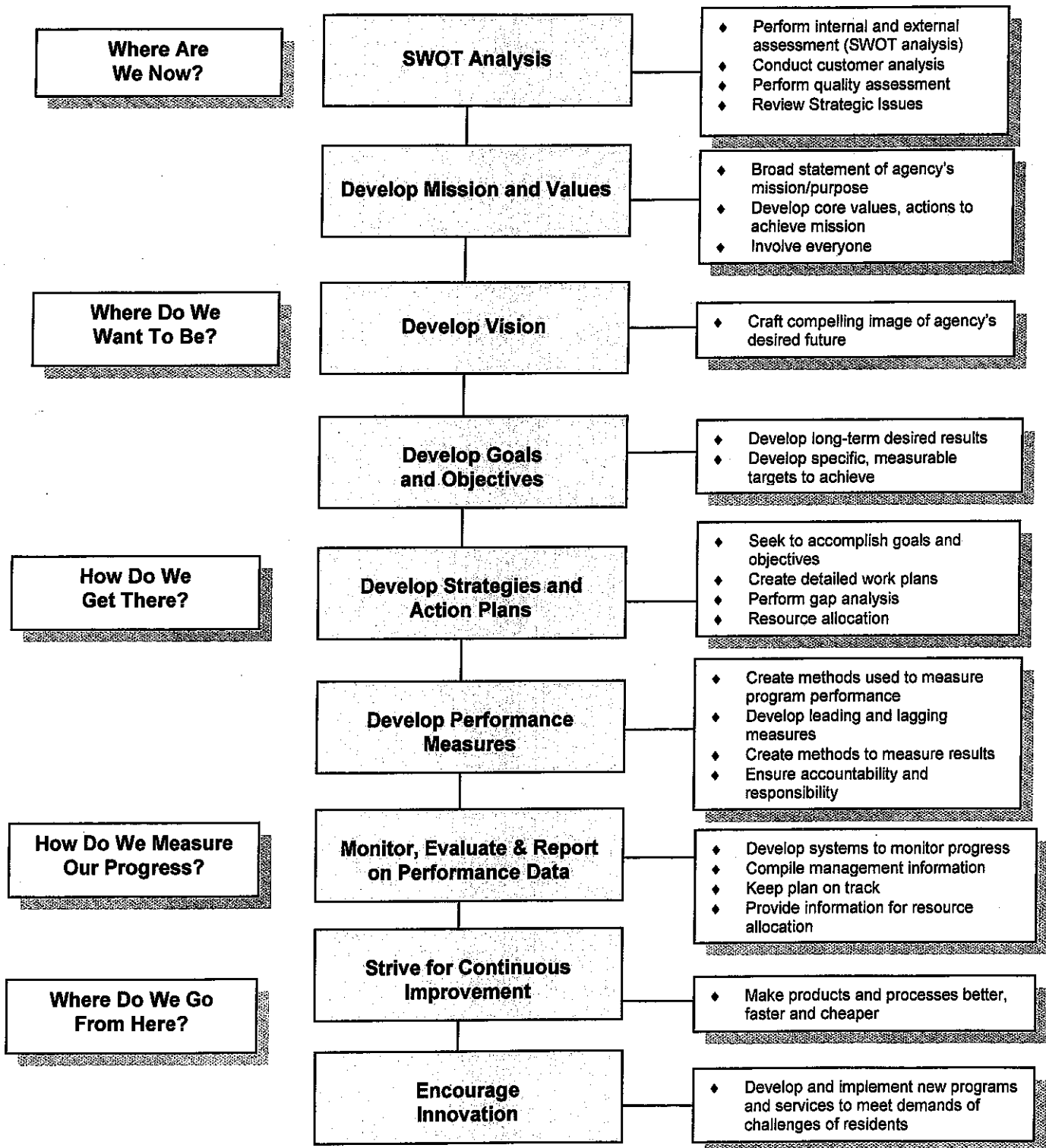


**Strategic Planning For Results**



**Living into Your Strategic Plan: Tools and Templates**

**Step 1: Translate**

**Initiative Action Plan Template**

**How to use this template**

**Why** would you use this template?

*For each initiative, use this action plan template to describe the context for the initiative, assign staff roles, and estimate anticipated outcomes, milestones, resources required, and interdependencies with other departments/functions*

**When** would you use this template?

*After strategic priorities have been translated into initiatives, as you detail what each initiative will entail*

**Initiative #: Name of Initiative Here**

**1. Related Strategic Priority**

*Select the organizational priority or priorities that this initiative will help to achieve*

- SP #:
- SP #:
- SP #:

**2. Initiative Context and Expected Results**

*Describe the project, why it was developed, expected results, and how its success will be assessed.*

**3. Team**

<b>Initiative lead:</b>	<i>Name, Title, Department/Region</i>
<b>Team members:</b>	<i>Name, Title, Department/Region Name, Title, Department/Region Name, Title, Department/Region</i>
<b>Proposed start date:</b>	<i>MM/DD/YY</i>
<b>Proposed end date:</b>	<i>MM/DD/YY</i>

**4. Resources Required**

<b>Financial and other resource implications:</b>	<i>Describe additional hires or other major costs associated with implementing initiative</i>
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**5. Initiative Work Plans and Interdependencies**

<i>List by objectives for initiative in chronological order of estimated completion</i>	<i>List the expected outcomes for each objective</i>	<i>Lead</i>	<i>Due Date / Milestones</i>	<i>Interdependencies</i>
		<i>Designate the person who will own initiative</i>	<i>MM/YYYY</i>	<i>List requirements from departments/functions within the organization (i.e., fundraising, training, HR, evaluation, etc.) needed to achieve each objective</i>

**Living into Your Strategic Plan: Tools and Templates**  
**Step 3: Mobilize**  
**Individual Strategic Objectives**

**How to use this template.** Give this template to individual staff members to create their own annual work plans, outlining their contributions to different initiatives, listing key activities, and staff interdependencies

**Why would you use this template?** When you are setting annual goals for individuals and in staff performance reviews

Name	
Position	
Department	

Strategic Priority	Initiative	Key Activities	Annual Objective	By When	Team
SP #	Insert name of initiative	Briefly explain your role in carrying out each initiative or strategic priority, where applicable	Define individual's goal related to the initiative or strategic priority	Indicate date or quarter in which the objective should be completed	Indicate team members who are working with you to complete the activity
Strategic Priority 1	1.1				
Strategic Priority 2	2.1				
	2.2				
	3.1				
	3.2				
Strategic Priority 3	3.3				
	3.4				

Living into Your Strategic Plan: Tools and Templates  
 Step 4: Align  
**Initiative Resource Planning Template**

**How to use this template**

**Why** would you use this template?

Use this template to estimate the true cost of each initiative through listing the related capital expenditures, startup/ongoing costs, and potential savings

**When** would you use this template?

As you are preparing for your annual budgeting process

**Initiative #:** Name of Initiative Here

**1. Capital Expenditures (CapEx)**

Line Item	Estimated Cost	Purchase Period	Notes/Description
List all capital expenditures (e.g., fixed assets that depreciate over time)		Estimate when costs will be incurred (MM/YYYY)	Add any additional notes here
<b>Subtotal: Capital Expenditures</b>	\$ -		

**2. Startup Costs**

Line Item	Estimated Cost	Timing	Notes/Description
List all startup costs (e.g., one-time or time-limited costs related to beginning the initiative, like hiring consultants, etc.)		Estimate when costs will be incurred (MM/YYYY)	Add any additional notes here
<b>Subtotal: Startup Costs</b>	\$ -		

**Total CapEx and Startup Costs:**

\$ -

**3. Ongoing Costs**

Line Item	Estimated Cost	Begin Date	Notes/Description
List all ongoing costs that continue over the course of completing the initiative (e.g., staff costs); assumes cost will be annually occurring after begin date		Estimate when costs are due to begin (MM/YYYY)	Add any additional notes here
<b>Subtotal: Ongoing Costs</b>	\$ -		

**4. Estimated Savings**

Line Item	Estimated Savings	Savings Period	Notes/Description
List any estimated savings that may be accrued through increased revenue (e.g., higher ticket sales) or reduced costs (e.g., less staff); may include one-time or ongoing savings		Estimate when savings are due to begin and end (MM/YYYY)	Add any additional notes here
<b>Subtotal: Estimated savings</b>	\$ -		

**Total Annual Operating Cost (less Savings):**

\$ -

Living into Your Strategic Plan: Tools and Templates  
 Step 5: Monitor

# Management-Level Performance Dashboard

**How to use this template**  
 Use this template with your management team to assess progress on the outcomes and targets set during Steps 1 and 2 to achieve your organization's initiatives  
 At your monthly program, operational, and quarterly reviews

**Why would you use this template?**

**When would you use this template?**

Strategic Priority	Initiative	Outcomes	Lead	Annual Target	Actual Progress	Status
Strategic Priority 1	List initiatives from Step 1 1.1 : EXAMPLE: Assess and segment sites into four broad categories	List the expected outcomes for each initiative from Step 1 • Each state is placed into one of four categories • Decision made on which sites to exit	List initiative owner here • George W • George W	Include target goal set during planning progress • All sites completed by Q2 2011 • Closure sites determined by Q3	Include most recent status on initiative • Completed by Feb 2011 • In negotiation about potential closure sites	Code in color
	2EXAMPLE: Assemble support teams and prepare supports for each category	• Support teams are established	• Sally O • Hillary J	• Four support teams set up by Q32011	• Three of four support teams established • Working on plan for serving struggling sites	
	2EXAMPLE: Engage in long-term strategic planning with high priority sites	• First long term strategic plan is complete	• Billy C • Danny K	• Finalized strategic plans completed by Q22012	• One plan finished, all other plans 50% completed	
Strategic Priority 2						
Strategic Priority 3						

Living into Your Strategic Plan: Tools and Templates  
 Step 5: Monitor

# Board-Level Performance Dashboard

**How to use this template**  
 Why would you use this template? Use this template with your board to assess progress and potential next steps on the high-level milestones for each initiative  
 When would you use this template? At board meetings, including quarterly and annual reviews of strategy and implementation

Strategic Priority	Status	Initiative Milestones	Lead	Proposed Next Steps
<i>List strategic priority here</i>	On Track Needs Attention Off Track	List initiatives and their accompanying metrics from Steps 1 and 2 here	List Initiative owner here	Propose appropriate next steps for the Board to discuss and approve
<b>Strategic Priority 1</b>				
<b>EXAMPLE: Grow to scale with programs in selected high priority states</b>	On Track Needs Attention Off Track	1.1 EXAMPLE: Assess and segment sites into four categories by Q2; identify which sites to exit by Q3 2EXAMPLE: Assemble support teams and prepare supports for each broad category by Q3 2011 2EXAMPLE: Engage in long-term strategic planning with high priority sites by Q2 2011	• George W • Sally O • Hillary J • Billy C • Darryl K	• Finish determining compensation packages and sales for closed sides • Determine approach and resources required to improve struggling sites • Hire consultant to assist with unfinished strategic plans
<b>Strategic Priority 2</b>	On Track Needs Attention Off Track			
<b>Strategic Priority 3</b>	On Track Needs Attention Off Track			