

A decorative graphic on the right side of the page features three blue circles of varying sizes, each composed of concentric circles in different shades of blue. Two thin blue lines intersect at the top left and extend diagonally across the page, framing the circles.

CLIENT Department -Strategic Planning Proposal

Type focus area and team #

[Type the author name]

[Pick the date]

Background and context

Overall team goal/major intent of this initiative:

Describe the intended outcomes of this initiative area

S.M.A.R.T. Goals:

1. List all SMART goals up front, numbering to make it easier to tie programs to SMART goals
2. List as many as you have
3. Be as specific as you can

Assumptions and boundaries:

- List all assumptions, perceived boundaries or other facts that helped your team which programs/initiatives you are focusing on, and how you plan to implement them
 - Use indents to add more facts or details
- These assumptions may apply to all SMART goals and all programs/initiatives, or they may apply only to some
- If it is important to link assumptions, etc. with each goal or program, you may want to indicate the goal like this (#1)

Here is an example from a development department of a large nonprofit:

- There is limited flexibility in gift receipt letter language to recognize donors who move from one level to another within a single year.

Assumption: accurate recognition of total giving during the year in gift receipt letters would show that we are aware of how much our donors are giving (regardless of size) and that we value their increased giving

Program/initiative proposals

Program #1: NAME

Use a sentence or two here to describe the program with as many specifics as you can. If it's related to a program from another team, clarify how the scope is different

Expected time to results:

- List projected dates by milestone or deliverable
- You can use a particular date, a month, or a quarter, end of year, etc.

Required resources

In this section, you'll identify all resources that this program will require to plan and implement successfully. If some resources will be needed more at certain times than others, indicate this by using a table such as the one below.

Resources may include addition of staff, program dollars, allocation of shared services, etc. When trying to quantify staff additions, focused IT resources, etc., simply state the portion of a person needed over a period of time. *Make sure not to double-count—i.e. if you indicate the need for a half-time equivalent staff person or portion of a focused IT person, do not also include a dollar figure for that person as well.*

You can plug figures into the table below, or can create your own to accommodate your content.

Q1	Q2	Q3	Q4
Dedicated gifts processor = ¾ time	Dedicated gifts processor = ¾ time	Dedicated gifts processor = ¾ time	Dedicated gifts processor = ¾ time
\$XK to ...	\$XK...	\$XK ongoing/qtr	\$XK ongoing/qtr
Dedicated development associate = ¼ time	Dedicated development associate = ¼ time	Dedicated development associate = ¼ time	Dedicated development associate = ¼ time
\$XK to ...	\$XK...	\$XK ongoing/qtr	\$XK ongoing/qtr
Dedicated IS support = 100% time	Dedicated IS support = ¾ time	Dedicated IS support = ½ time	Dedicated IS support = ¼ time
\$XK to ...	\$XK...	\$XK ongoing/qtr	\$XK ongoing/qtr

Dependencies

- In this section you will include people, groups, organizations, resources, behavior shifts, cultural changes---anything that represents a condition for success
- Especially include those dependencies that may not be obvious, but which could serve as tripwires if not acknowledged and addressed

Examples:

- Significant IS time could be requires up front to assist in restructuring gifts processing procedures.
- Initial up-front investment required for creation of marketing/communication tools to promote new consecutive year giving society.
- Perception that all gifts, no matter the size, are important must be communicated from the top down.

Risks and how best to mitigate

In this section you will briefly describe any risks you see in running this program, and suggestions for ways to mitigate, when you have them. You may not have an idea for mitigation in each case. See the sample below. Add rows as you need them.

Potential Risk	Possible Mitigation
Communications doesn't have space/resources to help promote new giving society	
IS will be overburdened with work required to update gifts processing procedure	
Training could require heavy staff time commitment up front	
Departments not able to adequately staff as proposed	

Implications for organization, deliverables, including:

- In this section, you'll flag the implications for your group, the department overall, the hospital, or other entities.
- In particular, consider those changes that are likely to be the hardest to implement, either due to resource constraints, culture changes required, or behavior shifts
- Make sure to reflect on how today's deliverables may be affected with the advent of this program

Appendix

Subteam member names

- Include names of core team members
- And include those who served as consultants or content experts
- If you collaborated with members of other subteams for your proposal, indicate that here

Additional ideas that merit additional focus and resources

- Include ideas drawn from focus groups, graffiti gallery, other subteams, etc. that want to call out as needing special attention and focus
- Choose a relative handful (approximately 2-8) to highlight