

# IDEA Strategic Plan Template (202x-202x)

## IDEA Vision Statement

*This is the future you intend to create.*

## IDEA Mission Statement

*This is what you do today. Your core driver.*



## IDEA Values

*These are the principles and ethics for which you stand.*

# Organizational IDEA Analysis

## I. Strengths

*Identify your internal IDEA strengths.*

## II. Weaknesses

*Identify your internal IDEA weaknesses.*

## III. Opportunities

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## IV. Threats

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*Identify your external IDEA opportunities.*

*Identify your external IDEA threats.*

## IDEA Goals Summary

### **Moonshot Goal** (aka: “Big Hairy Audacious Goal”)

It is 10 years in the future. What bold IDEA goal has your organization accomplished?

[Write Moonshot Goal here.]



**Goal #1** [What would get you closer to that Moonshot Goal? Write goal here]

**Goal #2** [What would get you closer to that Moonshot Goal? Write goal here]

**Goal #3** [What would get you closer to that Moonshot Goal? Write goal here]



## IDEA Goal #1 [Write goal here]<sup>1</sup>

A goal is a broad primary outcome that supports the organization's vision.

## Strategies

A strategy is a high-level approach you take to achieve the goal.

- [Write Goal #1 Strategy 1]
- [Write Goal #1 Strategy 2]
- [Write Goal #1 Strategy 3]

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<sup>1</sup> Copy and paste p. 4-8 as needed



# Q1 (202X)

#	Objective A measurable step you take to achieve a goal	Actions/Tactics Specific actions you will take to achieve a goal	Persons/Team(s) Responsible	To Be Accomplished By
1.1 <sup>*2</sup>	[Write first objective here]	<ul style="list-style-type: none"><li>1.1.1: [Write associated tactics or actions here]</li><li>1.1.2:</li><li>1.1.3:</li></ul>	[List tactic owners here]	[Write date objective is to be accomplished by or mark as ongoing]
2.1		<ul style="list-style-type: none"><li>2.1.1:</li><li>2.1.2:</li><li>2.1.3:</li></ul>		
3.1		<ul style="list-style-type: none"><li>3.1.1:</li><li>3.1.2:</li><li>3.1.3:</li></ul>		

Funding Allocated (if relevant)

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Associated Metrics & KPIs

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<sup>2</sup> Number assigned in the following order: Goal 1. Objective 1. Action 1



## Q2 (202X)

#	Objective	Actions/Tactics	Persons/Team(s) Responsible	To Be Accomplished By
1.2	[Write objective here]	<ul style="list-style-type: none"><li>1.2.1: [Write associated tactics or actions here]</li><li>1.2.2:</li><li>1.2.3:</li></ul>	[List tactic owners here]	[Write date objective is to be accomplished by or mark as ongoing]
2.2		<ul style="list-style-type: none"><li>2.2.1:</li><li>2.2.2:</li><li>2.2.3:</li></ul>		
3.2		<ul style="list-style-type: none"><li>3.2.1:</li><li>3.2.2:</li><li>3.2.3:</li></ul>		

### Funding Allocated

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### Associated Metrics & Key Equity Indicators

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# Q3 (202X)

#	Objective	Actions/Tactics	Persons/Team(s) Responsible	To Be Accomplished By
1.3	<i>[Write objective here]</i>	<ul style="list-style-type: none"> <li>1.3.1: <i>[Write associated tactics or actions here]</i></li> <li>1.3.2:</li> <li>1.3.3:</li> </ul>	<i>[List tactic owners here]</i>	<i>[Write date objective is to be accomplished by or mark as ongoing]</i>
2.3		<ul style="list-style-type: none"> <li>2.3.1:</li> <li>2.3.2:</li> <li>2.3.3:</li> </ul>		
3.3		<ul style="list-style-type: none"> <li>3.3.1:</li> <li>3.3.2:</li> <li>3.3.3:</li> </ul>		

## Funding Allocated

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## Associated Metrics & Key Equity Indicators

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# Q4 (202X)

#	Objective	Actions/Tactics	Persons/Team(s) Responsible	To Be Accomplished By
1.4	[Write objective here]	<ul style="list-style-type: none"> <li>1.4.1: [Write associated tactics or actions here]</li> <li>1.4.2:</li> <li>1.4.3:</li> </ul>	[List tactic owners here]	[Write date objective is to be accomplished by or mark as ongoing]
2.4		<ul style="list-style-type: none"> <li>2.4.1:</li> <li>2.4.2:</li> <li>2.4.3:</li> </ul>		
3.4		<ul style="list-style-type: none"> <li>3.4.1:</li> <li>3.4.2:</li> <li>3.4.3:</li> </ul>		

## Funding Allocated

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## Associated Metrics & Key Equity Indicators

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