



Introduction to strategic planning

This worksheet will guide your organization through the basic components of a strategic plan. Each section includes definitions, examples and space for your team to brainstorm and complete each part of the plan.

1. Vision Statement

The vision is a statement of your ideal future. It's aspirational, bold and inspirational. It represents what your organization hopes to achieve/contribute to in the long term (five to 10+ years). **Example:** A connected and inclusive community growing together through shared gardens.

What does a successful future look like for your organization?

2. Mission Statement

Your mission describes your core purpose — what you do, who you serve and how you do it. It should be focused and grounded in the present. **Example:** Create and sustain accessible garden spaces that promote food security, environmental education and community engagement.

What is your organization's core purpose?



3. Core Values

Core values are guiding principles that reflect your organization's beliefs, behaviours and priorities. These values shape your culture and decision-making. **Examples:**

- Inclusion – we welcome everyone.
- Sustainability – we respect and care for the environment.
- Collaboration – we work together with our community.

What principles guide your organization's behaviour?

4. Goals

Goals are broad outcomes your organization wants to achieve in a timeframe. Each goal should connect to your mission and respond to current needs. **Example:** Strengthen community partnerships to increase engagement.

- **Goal one:**

Why is this goal important to your mission?

How will achieving this goal support your vision?

- **Goal two:**

Why is this goal important to your mission?

How will achieving this goal support your vision?

- **Goal three:**

Why is this goal important to your mission?

How will achieving this goal support your vision?

5. Strategies

Strategies are the general approaches or directions you will take to achieve your goals. Strategies bridge the gap between your goals and actions.

Example: Host seasonal community events to build awareness and invite participation.

- **Goal one – strategies:**

Strategy one: _____

Why this strategy? _____

Strategy two: _____

Why this strategy? _____

- **Goal two – strategies:**

Strategy one: _____

Why this strategy? _____

Strategy two: _____

Why this strategy? _____

- **Goal three – strategies:**

Strategy one: _____

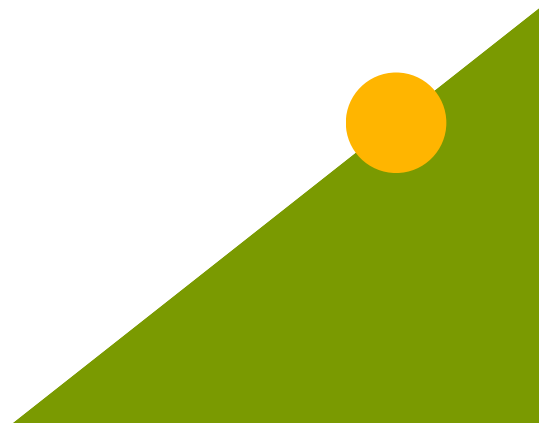
Why this strategy? _____

Strategy two: _____

Why this strategy? _____

6. Action plan

Your action plan includes specific steps for each strategy. For each action, list who is responsible, what the timeline is and what resources you will need.



Goal one:

- **Action one:**

When will it happen? _____

What resources are needed? _____

- **Action two:**

When will it happen? _____

What resources are needed? _____

Goal two:

- **Action one:**

When will it happen? _____

What resources are needed? _____

- **Action two:**

When will it happen? _____

What resources are needed? _____

Goal three:

- **Action one:**

When will it happen? _____

What resources are needed? _____

- **Action two:**

When will it happen? _____

What resources are needed? _____

7. Evaluation Plan

Evaluation tracks your progress. A strong evaluation framework includes:

- **Objectives** – specific, measurable targets over a defined timeframe.
- **Indicators** – descriptions of what success looks like.
- **Performance measures** – data you collect to assess progress.



Example evaluation plan:

- *Objective: increase community workshop attendance by 25 per cent within one year.*
- *Indicator: workshops attract more first-time participants.*
- *Performance measures: number of attendees per workshop, percent of first-timers, post-event feedback.*

Your Evaluation Plan

Goal one:

- **Objective:** _____
- **Indicator:** _____
- **Performance measures:** _____

Goal two:

- **Objective:** _____
- **Indicator:** _____
- **Performance measures:** _____

Goal three:

- **Objective:** _____
- **Indicator:** _____
- **Performance measures:** _____

