

LGBT Consortium: Organisational Health Check

Planning: Strategic Planning



Section	Details	Include	Internal Document	External Document	Tips
Introductions	Introduction should be from the Chair person or CEO (or both) and should summarise the document and set the tone for the Plan.	<ul style="list-style-type: none"> • Thanks • Achievements • Key goals • Major challenges 	Opportunity to thank staff/volunteers and to comment on key successes and any approaching challenges.	Give the organisation a face and personality and sell the key achievements whilst reflecting on what the future brings.	Be realistic, be upbeat, be positive – we want to see solutions and ideas not barriers and problems!
Background	Reflect on the background of the organisation, its work and the impact it has made so far to set the scene for the moving forward.	<ul style="list-style-type: none"> • Key milestones • Beneficiaries • Impact 	If your plan is for internal use only, don't spend a lot of time waxing lyrical about the past, just use it to set the scene, reflect and highlight key learning from it.	This may be the first-time funders or corporates come across your organisation so sell it to them! An external facing strategic plan can be a great marketing tool!	Think about who this document is for; don't bore, sound passionate and show what difference it has made to beneficiaries.
Purpose	Set out a clear Purpose of who you are, what you do, who you do it for and why.	<ul style="list-style-type: none"> • Mission • Vision • Key work • Successes • Expertise 	Use internal plans to refresh and regroup those who will be using it – ensure you involve volunteers and staff in creating the plan	Sell your organisation, don't be shy about the work it does and who for, especially if you're trying to attract funding - blow that trumpet!	Remember your audience; <ul style="list-style-type: none"> • Beneficiaries • Funder • Stakeholder • Corporate
Analyses	Exploring and Analysing the internal environment e.g. capacity and resources and the external environment e.g. political, economic, legislation, societal trends.	<ul style="list-style-type: none"> • Analyses of external factors • Analyses of internal factors • Check out NCVO's guidance on this 	Analyses of both the internal and external factors and what risks/ opportunities they present Very important to do your homework.	A summary of the external factors and what opportunities they present e.g. we know that EU funding will soon be a thing of the past – what's might to be available instead!	Don't forget to consult with and include beneficiary's views, feedback and ideas. Check out LGBT Consortium's latest Impact Reports .
Strategic Goals	Lay out the goals for the organisation. Whilst it is important to be realistic, don't be shy about being ambitious and innovative!	<ul style="list-style-type: none"> • Clear, relevant, tangible goals • Can be split into themes, or areas of work e.g. LGBT Consortiums Plan 	Goals will inform trustees, staff, volunteers (and possible beneficiaries) of the direction and focus of their work re: service deliver, fundraising, and relationship building.	Help external audiences see how your goals will impact your beneficiaries and improve the work you do.	This is your chance to sell your organisations as being innovative, ambitious and forward thinking. Don't mission drift here!
Strategic Objectives	How are you going to achieve the goals set out above – what resources and support might you need?	<ul style="list-style-type: none"> • Time line • Action/work needed • Identify the nature of the goal: short, medium or long term. 	Goals should be broken down into achievable and quantifiable actions and given a time frame and allocated to a team/department/person.	Goals should be broken down into actions and outcomes that relate to furthering the purpose of the organisation.	Remember who your audience is and let the language you use and the details which you go into reflect that