



Annual Plan Template

Description:

This tool provides a template to follow as you create your Annual Plan.

How it can be used:

An Annual Plan is an effective way of planning what you will accomplish this year and how this will help to achieve your strategic goals. Your Annual Plan is the ‘engine’ that puts your Strategic Plan into action. Use and adapt the template to fit your needs to help guide your organization’s annual planning process.

The sample below shows how the Annual Plan links back to the Strategic Plan (medium to long term plan). The Strategic Planning process is completed first and guides the Annual Plan.

SMART stands for:

- **Specific** (*is the objective specific enough?*)
- **Measurable** (*can you measure whether you are achieving your objective?*)
- **Achievable** (*is it realistic that you can achieve this objective in the time period?*)
- **Relevant** (*is this objective relevant to addressing the priorities and achieving your goals?*)
- **Time-based** (*are there timelines?*)

An Annual Plan template is provided on the next page.

Strategic Plan (5-10 years)					
Vision					
Mission					
Priorities					
Goals (<i>what</i> you want to accomplish over the next five-ten years) <i>A sample Strategic Goal might be: Reduce the rate of teenagers who start smoking by 50%</i>					
Strategies (<i>how</i> you will accomplish the goals) <i>An example of a strategy might be developing school-based curriculum</i>					
Annual Plan - Operational (1 year)					
Objectives (SMART mini-goals) What we will do this year to help achieve our Strategic Goals			1. Pilot test a ‘No Smoking’ program for elementary children by December 20xx		
Tactics (Actions to achieve the objectives) How we will achieve the objectives	Who is responsible	Timeline	Resources required	Performance indicators	Sources of data
Conduct a scan of school-based programs in other communities	Identify one person	Start and finish	\$, time, HR	How will success be measured?	Where will you get info?





Strategic Goals (*what you want to accomplish over the next five-ten years*)
This is included to keep focused on what the organization is seeking to achieve.

Annual Plan - Operational (1 year)

<p>Objectives (<i>SMART mini-goals</i>)</p> <p>What we will accomplish this year to help achieve our Strategic Goals</p>	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. 7. 8. 9. 10.
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Tactics (<i>Actions to achieve the objectives</i>) How we will achieve the objectives	Who is responsible	Timeline	Resources required	Performance indicators	Sources of data

