Strategic Planning Template

RMTAC
Resource & eMpowerment Technical Assistance Center for Behavioral Health

How to use: For each area of focus within the identified domain, complete the table below. Identify the specific strategy best suited to address the area of focus based on the whiteboard strategy session. Identify the action steps that can be taken immediately and assign a staff member who will be responsible for taking the identified action, noting any resources that will be needed and the time frame in which it should be accomplished. Note that you may have multiple action steps related to each focus area.

Organization Mission Statement and Values

Choose a Domain

- ☐ Leadership Capacity
- ☐ Management and Operations Capacity
- ☐ Community Engagement Capacity
- ☐ Service Capacity
- ☐ Evaluative Capacity

Area of Focus

Area of Focus 1	*Add area of focus within the domain.*
Strategy	*Example: strategies identified in the whiteboard session.*
Action Steps	1. 2. 3. 4.
Assigned to / Collaboration with	
Resources Needed	1. 2. 3. 4.
Time Frame	Start Date: End Date:

Area of Focus

Area of Focus 2	*Add area of focus within the domain.*
Strategy	*Example: strategies identified in the whiteboard session.*
Action Steps	1. 2. 3. 4.
Assigned to / Collaboration with	
Resources Needed	1. 2. 3. 4.
Time Frame	Start Date: End Date:

Area of Focus

Area of Focus 3	*Add area of focus within the domain.*
Strategy	*Example: strategies identified in the whiteboard session.*
Action Steps	1. 2. 3. 4.
Assigned to / Collaboration with	
Resources Needed	1. 2. 3. 4.
Time Frame	Start Date: End Date:

Notes & Resources

Final Recommendations	*Take note of any learning points or final steps for the team.*
Resource Links	• Creating an Adaptive Strategic Plan • Adaptive Strategic Planning-Toolkit and Guide • AmeriCorps Assessment • Creating a Dynamic and Useful Strategic Plan

DISCLAIMER

This publication was prepared by the Resource & eMpowerment Technical Assistance Center for Behavioral Health (RMTAC). This publication is intended as a reference guide only and does not constitute legal or professional advice. RMTAC assumes no liability for any actions taken based on the information provided herein nor responsible for any errors or omissions, or for the results obtained from the use of this information. RMTAC is funded by SAMHSA and supported by Grant Number SM089527 from 11/30/2023 to 09/29/2028.