**Appendix A - Annual plan template**

Set out below is a very simple annual plan template. This template can be adapted for individual organisations as required.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **[CHARITY NAME] – Annual Plan** | | | | | | | |
| **Describe your charitable purpose:**  *(Your charity’s ‘purpose’ is what it is set up to achieve. This purpose is usually set out in the ‘objects clause’ of your charity’s governing document)* | | | | | | | |
| **Planning period: [DD/MM/YYYY – DD/MM/YYYY]** | | | | | | | |
| **Goals**  *(Describe what you plan to achieve)* | **Objectives**  *(Set out specific steps or actions you take to reach your goals)* | **Timeframe** | | | | **Owner** | **Annual Budget** |
| **Q1** | **Q2** | **Q3** | **Q4** |
| **Goal 1:** | **1.** |  |  |  |  |  |  |
| **2.** |  |  |  |  |  |  |
| **3.** |  |  |  |  |  |  |
| **4.** |  |  |  |  |  |  |
| **5.** |  |  |  |  |  |  |
| **6.** |  |  |  |  |  |  |
| **Sub-total:** | | | | | | |  |
| **Goal 2:** | **1.** |  |  |  |  |  |  |
| **2.** |  |  |  |  |  |  |
| **3.** |  |  |  |  |  |  |
| **4.** |  |  |  |  |  |  |
| **5.** |  |  |  |  |  |  |
| **6.** |  |  |  |  |  |  |
| **Sub-total:** | | | | | | |  |
| **TOTAL:** | | | | | | |  |

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