**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.

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| **[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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