Forward Plan Template

For Scotland’s geographic forums

**FORWARD PLAN DATE:**

*Insert start and end date. Forward planning cycles are usually between 2-5 years.*

**NAME OF FORUM:**

*Insert name of forum.*

**DATE ON WHICH THIS PLAN WAS APPROVED:**

*Insert date.*

**DATE AT WHICH THIS PLAN IS DUE FOR REVIEW:**

*Insert date.*

**PURPOSE STATEMENT (aspirational)**

The statement of purpose defines **why** the forum exists and who it is for. This may be taken from your governing document and should be consistent across all plans and policies. It should be no more than a couple of sentences and state the contribution that the forum will make and the impact that this will have as a result.

*Example: The [insert forum name] exists to strengthen ties between local organisations to develop and promote our members and our local heritage.*

**KEY AIMS (aspirational)**

List around 3-5 aims relating to the forum. This is **how** you are going to achieve your purpose and outlines your **values** as a forum. These should be medium to long-term in focus and build from the statement of purpose.

*Example 1: To be an accessible and inclusive environment for our members.*

*Example 2: To provide a supportive platform for the development of collaborative working.*

**ACTIVITIES (practical)**

Identify **what** activities and objectives need to be achieved in this planning cycle under each of your key aims. Follow the SMART principle (Specific, Measurable, Achievable, Relevant and Time-bound).

*Example 1: Organise training for members in xxxxx by [date].*

*Example 2: Establish partnership with XXXX and explore opportunities for [training/marketing/joint-working].*

*Tip: Avoid words like “ongoing” and “continue to” in your activities.*

**ACTIVITY PLAN (practical)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Aim** | **Activity** | **Responsibility** | **Notes** | **Dates** |
| *To provide an supportive platform for the development of collaborative working.* | *Run an away day for members to collaborate and design projects* | *Secretary* | *Additional notes* | *March 2023* |

**BUDGET/SPENDING PLAN (practical) (if applicable)**

Include details of the budget for your current financial year and next financial year. You should include all expected income and all expected expenditure, both overheads and expenditure connected to your specific objectives and activities.