

Plan like a pro tipsheet

Planning involves deciding what you want to do and determining the best way to do it while organizing tasks, time, and resources. It reduces confusion, brings clarity, and helps the co-op complete work more easily and efficiently.

Strategic Plan vs. Annual Plan

A **strategic plan** shows where the co-op wants to go over the next three to five years. It helps everyone share the same vision and guides yearly goals by clearly setting out the co-op's vision, mission, core values, and main priorities.

An **annual plan** shows what an organization will focus on in the coming year. It turns the long-term goals from the strategic plan into clear actions, priorities, and tasks so everyone knows what needs to be done and can track progress throughout the year.

Pro Tip: *An annual calendar lists key activities and deadlines for the year so people can plan and complete important tasks on time.*

Plan SMART: Having a SMART goal helps keep goals simple and achievable by clearly saying what will be done, how success will be measured, whether the goal is attainable and realistic, and when it needs to be finished with a clear deadline.



Annual Plan 2026-2027

<insert co-op name>

Our mission is to

Our Vision is to...

Our core values are ...

Fiscal Year: <insert fiscal year>

Q1:

Q2:

Q3:

Q4:

Strategic Initiatives:

<add initiatives>

<add initiatives>

<add initiatives>

An annual goal explains what the co-op wants to accomplish this year to support a larger strategic initiative. It should be:

- *Clear and easy to understand*
- *Realistic for one year*
- *Focused on improvement, not perfection*

Example of Annual Goal: *Ensure the co-op is meeting obligations by holding at least four board meetings, updating existing bylaws & one (1) policies, and developing a plan to share board decisions with members after each meeting.*

Possible Tasks:

Schedule and hold at least four board meetings: Set meeting dates for the year in advance / Use a simple agenda for each meeting / Record brief minutes that note key decisions

Review and update bylaws and one (1) policy: Identify which policies need review this year / Update policies that are out of date or unclear / Record when policies were reviewed and approved.

Share board decisions with members after each meeting: Prepare a short, plain-language summary of decisions / Share updates with members in a consistent way (email, notice board, newsletter) / Include contact information for questions or feedback

Annual Goal: Ensure the co-op is meeting obligations by holding at least four board meetings, update existing bylaws & one (1) policy, and develop a plan to share board decisions with members after each meeting.

Task	Responsibility	Date	Progress notes
Review and update Bylaws	<insert individual name, committee or entity supporting>	Q1	<ul style="list-style-type: none"> • Download CHF Canada template • Complete draft template • Present to members for feedback • Special Member Meeting to approve Bylaws • Submit bylaws to Registrar • Complete
Review and update Spending Policy	<insert individual name, committee or entity supporting>	Q3	
Schedule and hold at least four board meetings	<insert individual name, committee or entity supporting>	Q1	Annual Board Calendar created and shared with members via email on May 27 th , 2026

Annual Goal:

Task	Responsibility	Date	Progress notes

Annual Goal:

Task	Responsibility	Date	Progress notes

<insert co-op name> Current Policies & Bylaws

Item	Last date updated	Due for review

Current <co-op name> Board Member terms and positions

Board Members	Current position	Term	Term End

Example of: Current Funding Report Schedule

Fund	Administered By	Status	Due Date	Notes
Co-operative Development Program (CDP)	The Co-operators	Approved April 2026 \$10,000	June 11, 2025	Supporting Website Development