

A strategic plan is a structured document that guides a health department's work over a set period, usually 3-5 years. It outlines the department's priorities, goals, and strategies for improving organizational effectiveness and achieving its vision for the future.

This user guide provides instructions for using the [Strategic Plan Template](#), designed for state, territorial, local, and Tribal health departments. The template aligns with the documentation requirements for a department-wide strategic plan using v2022 of the PHAB Standards and Measures for Initial Accreditation, Reaccreditation, and Pathways Recognition.

The template is intended as a **flexible resource** and should be modified to fit your agency's unique **context, needs, and branding guidelines**. *Use of this template **does not guarantee** conformity with PHAB Standards and Measures for Initial Accreditation, Reaccreditation, or Pathways Recognition.*

Before using the template, users are strongly encouraged to review:

- This User Guide & Resource Manual
- The Strategic Plan Template
- v2022 of the PHAB Standards & Measures (with a focus on Domain 10)

Acknowledgements

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Using the Template

Document Format: The template is created in Microsoft Word. Users can copy and paste the content into their agency’s preferred document format and branding as needed.

Customization: Template sections should be edited to align with agency needs and naming conventions. Please add or delete sections as necessary. However, if seeking (re)accreditation, be mindful of “Accreditation Notes” throughout to avoid removing sections that align with specific documentation requirements.

Color-Coded Text:

- **Black:** Standard headings and content, which can remain or be modified to match the agency’s voice.
- **Blue:** Instructions and descriptions of suggested content. Blue text should be edited or removed. Once finalized, change blue text to match the document’s color scheme.
- **Brown:** References to associated PHAB Standards and Measures for [Initial Accreditation](#) and [Reaccreditation](#). Agencies seeking initial accreditation or reaccreditation should refer to the Standards and Measures for detailed guidance.

Table of Contents: The template is designed using Heading Styles, which automatically generate the Table of Contents. Learn more about this feature here: [Video: Introduction to Tables of Contents \(TOCs\) - Microsoft Support](#).

Page Breaks: Page breaks are inserted at the end of some sections of the template. These can be deleted or adjusted. To view page breaks, click the “Show/Hide” (¶) button in the Home tab ribbon in Microsoft Word.

Examples

Examples are provided in gray boxes with blue text throughout the template. They are suggestive only and not all-inclusive. Agencies are encouraged to use the examples for reference only and adapt each section with information and materials that are applicable to their strategic planning process.

Important Considerations

Below are additional considerations to guide you as you navigate the template:

- The template is designed for agencies of all sizes and levels of strategic planning experience.
- Customize the sections and examples to align with your agency's unique strategic planning process.
- Align the template with your agency's preferred format, style, and branding.
- Keep the plan concise yet descriptive, using visuals like tables and charts to simplify complex information.
- Place regularly updated sections (e.g., action steps, implementation plans) in the appendices to streamline revisions.
- Review for accuracy, formatting consistency, and compliance with PHAB Standards. Ensure the final version is dated, authenticated, and free of placeholder text.

Disclaimer

Use of the template does not guarantee conformity with PHAB Standards and Measures for Initial Accreditation, Reccreditation, or Pathways Recognition. Contact PHAB's technical assistance team at phabta@phaboard.org for questions or suggested improvements.



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Strategic Planning Resources

There are a growing number of resources to support strategic planning in public health. While PHAB does not endorse any specific software, vendor, or accreditation-related product, the following resources included in the table below may be helpful.

Health departments should also consider state, regional, and local resources that can be leveraged towards strategic planning, (e.g., community-based organizations, local universities, regional and state planning councils, nonprofit hospitals, local foundations, and public health associations) and may create their own repository of resources to add to those below.

If there are additional strategic planning resources that you feel would be helpful to include in this user guide, please email phabta@phaboard.org with the name of the resource/organization, a description of the resource, and a link.

Resource	Description & Location
Association of State and Territorial Health Officials (ASTHO)	A membership organization for state and Territorial health officials. Resources and links to strategic planning guides and training modules can be found here: 2024 Organizational Strategic Planning Guide , Strategic Planning Guide: Guidance and Resources to Assist State and Territorial Health Agencies in Developing A Strategic Plan , Strategic Planning Module
Community Tool Box	An online resource for those working to build healthier communities and bring about social change. Strategic planning resources can be found here: Developing a Strategic Plan
National Association of County and City Health Officials (NACCHO)	A membership organization that represents and supports local health departments across the U.S. Resources and links to strategic planning guides can be found here: Developing a Local Health Department Strategic Plan: A How-To Guide , Strategic Planning Resources , NACCHO University
Public Health Accreditation Board (PHAB)	National accreditation standards, measures, and requirements related to strategic planning. Strategic planning training, technical assistance, and other resources including plan templates can be found here: http://www.phaboard.org/
Public Health Learning Navigator	A repository of peer reviewed curated learning content and opportunities: Public Health Learning Navigator NNPHI (phlearningnavigator.org) , Strategic Planning Courses
Region V Public Health Training Center	Part of the national Public Health Learning Network, a consortium of ten regional Public Health Training Centers. Training on strategic planning can be found here: P2P Strategic Planning Series
TRAIN	Searchable public health related continuing education opportunities offered by affiliates from across the country: TRAIN (phf.org) , TRAIN Strategic Planning Courses
University of Nebraska Medical Center College of Public Health	Currently developing a strategic planning facilitation guide to assist with the facilitation of each part of the strategic planning process. Expected release will be towards the end of 2025.