

The strategic plan is the most important document of your organization. It clarifies how your everyday activities tie into your vision for the future. When it is done, you should print it out and look at it every day.

It is possible to spend a great deal of time creating a strategic plan. The approach described here is simple and minimalistic. Following these guidelines, a small group can quickly create a workable plan and begin implementing it immediately. Larger organizations may need to spend more time in preparation and planning.

**Update Regularly** The strategic plan should be a living document. For small groups, we recommend creating a plan annually and updating it every three to six months.

### PREPARATION

The organization should prepare for the planning meeting by gathering input into your current work from the community you serve, your donors, your board, and ally organizations. Ask what they see as the major strengths and weaknesses of your group's approach, and the greatest opportunities and risks to your work. You may not agree with all their comments, but this consultation will give you a clearer picture of how others see your work.

Based on their input, you should be able to identify a few key issues that need to be addressed in the planning process. You may even want to invite one or more of those people to come to the planning meeting and to share their thoughts with the whole group.

### THE PROCESS

Everyone, including the board, staff, and volunteers, should have input into your organization's plan. This is a chance for everyone to agree on the shared goals, and to understand why everyone should work together as a team for the rest of the year. It is also important because if we want to build a more just and egalitarian society, we have to begin in our own organizations, by valuing and respecting every individual's right to participation and right to freedom of expression. Useful ideas can come from every part of the organization.

Begin the planning meeting with a discussion about the current environment for your organization's work. Ask someone to present briefly on major new developments, such as significant policy changes that affect your work. Have someone else sum up, either in writing or verbally, the programs from the past year and what the organization's experience has been with them. This provides some background so that planning does not happen in a vacuum.

**The Basics** Set aside time to discuss for at least a few hours or a day. We like to buy food and drink for everyone, ask everyone to turn off cell phones and stop checking email, and post large sheets of paper up on the wall where we draw the plan. We ask someone with good handwriting to fill in the boxes, so that everyone can see the plan as it develops. Ideally, it's best to have an experienced facilitator from outside the organization run the meeting, as she or he will be more objective and can help to resolve any conflicts.

### THE LOGIC MODEL

The Logic Model is a conceptual tool that helps you visualize your strategic plan. With it, you can draw the connection from your organization's resources, actions, outputs, and outcomes to the ultimate goal that your group wants to achieve in your community. It is a good way to assess your programs.

Move from right to left, filling in one column at a time. Start by reviewing your Vision and make sure you all still agree with it, then move to the left and discuss Outcomes, then Outputs, and then Actions. Try not to think about the Actions (programs for this year) until you finish the columns to the right of it. The number one mistake most groups make is to make decisions about this year's programs before the other columns on the right are done.

If you find during this planning meeting that you are making tough decisions and deciding not to do certain things that you really wanted to do, then you are doing this correctly. That is at the core of planning: evaluating what resources you have, and making realistic choices.

### Vision | 20-Year Goal

This is the ultimate vision of your organization, the thing that motivated you to start doing this work in the first place. It should be even simpler than your mission statement: a short, clear statement of only one or two sentences that describes what you hope will be the end result of your work. It should be ambitious and inspiring. Good examples: "End homelessness in Beijing," "All courts in Indonesia sentence drug users to rehabilitation, not prison." Make sure you have consensus in the whole organization about this statement. If people find it difficult to come up with this statement, ask them to visualize a world in which your group's work is no longer necessary, and describe it in one sentence. See [How To Draft A Vision Statement](#).

**Very Important** Every single program activity of your organization must be included in the plan. If your executive director spends 50 percent of her time speaking at international conferences, then that should be an Action on the plan and that connects to Outputs and Outcomes. If it doesn't connect, she may need to spend less time traveling. If you're spending half your budget running a shelter for battered women, but all your Outcomes are about something else entirely, you can't just leave the shelter out of the plan. Maybe you need to think of ways that the shelter can help to achieve Outcomes, or maybe you need to add steps in the plan to phase out the shelter. Look at every single thing you do and make sure it is helping you reach your goals.

### Outcomes | 5-10 Year Goals

What are the steps that need to happen in five years in order to achieve your 20-year goal? These are big changes, but they are also things that are clear and measurable milestones—a specific change in law or policy, or a new facility established. At the same time, these Outcomes should be realistic. There should be no more than three or four Outcomes, and they should all clearly be steps towards the 20-year Output.

Some poor examples: "More homeless people know about their rights" or "National government improves policies on drug users." Better examples include: "Build new homes for 500 homeless families in New York City," or "All hospitals in our province will provide methadone to patients who are recovering injection drug users." These are statements that are ambitious,

but also clearly measurable. This is also a time to return to the inputs you received during the preparation phase and to evaluate your organization's work last year. Are there things your organization does especially well? Are there things you do now that other groups do better? Are the outcomes building on your existing experiences, and your organization's strengths and resources?

### Outputs | 2-Year Goals

This is often the most difficult part of the process, because it's the part where vision meets reality. Most organizations spend a lot of time working on this column. In this column, you need to come up with specific, achievable results of your work in the next two years. Each of these should lead clearly to at least one of your 5-year Outcomes. Each Outcome should have at least one Output that connects to it. You will need to make tough choices in this section and be honest about what you can really achieve with the staff and funding you currently have.

#### What's the difference?

Outcomes are goals that are achievable in 5-10 years, while Outputs are goals you can achieve in the next year or two. Outputs are smaller steps that will lead to the achievement of an Outcome.

You also have to be sure that your Outputs logically result from what your organization actually does. This is where common sense becomes important. For instance, if all your Outcomes (5-10 year goals) are about legal and policy change, but all your current programs are services such as providing food and medical care, then that is not a logical plan, and something will have to change. Some people like to use very specific numbers here. Others prefer to keep it more vague. Either one is fine, but try not to have more than 5-8 Outputs. For a small organization, eight Outputs is a lot to accomplish in two years.

### Actions | Next Year

Once the Vision, Outcomes and Outputs columns are done, this part is easy. It's just the programs you will do this year in order to create the 2-year Outputs. For instance, if your Output is "40 people trained in legal rights," your Action may be "two legal rights workshops for 20 people each." Each Action should have at least one arrow pointing to an Output. Try to be as specific as possible, using concrete numbers.

### Resources | What You've Got

Writing all these goals can be overwhelming. In this column, you brainstorm about people who can help you get this done: current and potential funders who might support your work, other NGOs that can share resources with you, university programs that might sponsor events, experts who might help with training. List all the people you need to reach out to in order to do the programs. You can also list all the current resources you have: office space, computers, printer, and other items that help you do your work. The nice part about this step is that it is a reminder that while the tasks ahead are ambitious, your organization is not alone.

### FINALIZING THE PLAN

Take one more look—does every box have an arrow that points to another box? Is there a logical relationship between each part of the plan? Will the Actions result in the Outputs, and will those lead naturally to the Outcomes? Have you included absolutely every one of your programs?

**Boxes and Arrows** To create a new box, move the mouse to the box corner. When you see the crossed arrows, click on the box and hit Ctrl+C. Unclick on the box and hit Ctrl+V. You can drag the box around to where you want it using the mouse. To copy an arrow, click on it and hit Ctrl+C, then unclick and hit Ctrl +V. When you click on the arrow, you can click on one of the small circles to change the arrow's shape or direction, and click on the body of the arrow to move it around.

### NEXT STEPS

We recommend doing a few drafts of the plan internally, and then showing the plan to a few outside friends to get their feedback before you make the plan official. Finally:

1. **Create a monthly timeline.** Create a spreadsheet with Actions on the left, and the months across the top. Plan out the steps for each Action each month. Decide who will be responsible for each Action. If no one wants to be responsible for it, it should be removed from the strategic plan. See [How To Create A Timeline](#).
2. **Create an annual budget.** Create a spreadsheet with Actions on the left and the cost of each Action in the next column. See [How To Create A Budget](#) and [Template | Budget](#).
3. **Send the plan to your donors.** Donors appreciate seeing the big picture of your work and how the projects they support fit into your long-term strategy.
4. **Post the plan, budget and timeline** in the office where you, your colleagues and visitors can see it each day.
5. **Review the plan** and see whether you are making progress in six months. Are the Actions leading to the Outputs you planned? Why or why not? If they are not having the result you intended them to have, you may need to reevaluate whether or not these are the right Actions.

For more of the Nonprofit Survival Guide, visit:  
[www.asiacatalyst.org](http://www.asiacatalyst.org)