

HOW TO CREATE A STRATEGIC PLAN

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

The plan should be created collectively by ALL of the board, staff and volunteers of the organization – including student interns, administrators, and people who make the tea and clean the floors. This is important because it is one chance for everyone to agree on what their shared goals are, 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. As the director, you might be surprised to find that useful ideas come from every part of the organization, and that the people who clean the floors might know things about your organization that you do not know.

Set aside time to discuss for at least a few hours. 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 someone you trust from outside the organization facilitate the meeting, as they will be more objective and will see new things.

One of the things that most grassroots NGOs have a hard time doing is keeping things simple. They tend to write vague mission statements and commit to more programs than they can really carry out with a small number of staff. This harms their ability to raise funds, and eventually confuses and frustrates everyone connected with the organization. A simple, clear and inspiring mission statement is the most important tool you can create for the long-term health of your NGO. For example, when Bill Clinton ran for US president, his campaign staff had a very simple mission statement which they posted on the office wall: "It's the economy, stupid!" In every speech and interview, Clinton talked about the importance of improving the economy, and so he won the election.

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.

2. Always go from right to left – Move from right to left, filling in one column at a time: Start by reviewing your vision and making sure you all still agree with it, then move to the left and discuss Outcomes, then Impacts, 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. That is not strategic planning.

3. VISION: The 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. If you achieve this vision, you could turn off the lights, close the office and all go home. 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 New York City”, “All courts in Indonesia sentence drug users to rehabilitation, not prison.” Some of the groups we work with have something like this: “All people with HIV/AIDS in (X country) know and can implement their legal rights.” Make sure you have consensus in the whole organization about this statement.

4. OUTCOMES: The 5-10 year goal – 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 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 impact. 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.”

5. IMPACTS: The 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 Impact 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. You also have to be sure that your Impacts logically result from what your organization actually does. This is where common sense becomes important. For instances, 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 with us, but try not to have more than 5-8 Impacts. Eight Impacts is already a lot to accomplish in two years.

6. ACTIONS: The plans for the next year – Once the Vision, Outcomes and Impacts columns are done, this part is easy. It’s just the programs you will do this year in order to create the 2-year Impacts. For instance, if your Impact is “40 people trained in legal rights”, your Action may be “two legal rights workshops”.

Each Action should have at least one arrow pointing to an Impact. Try to be as specific as possible, using concrete numbers.

7. RESOURCES – 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. The nice part about this step is that it reminds everyone that we are not alone.

8. VERY IMPORTANT: LEAVE NOTHING OUT – **Every single program activity of your organization must be included in the plan.** If your executive director spends 50% of her time speaking at international conferences, then that should be an Action on the plan and that connects to Impacts 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.

9. Finalizing the plan – Take one more look – does every box have an arrow that points to another box? Does it all make sense? Will the Actions result in the Impacts, and will those lead naturally to the Outcomes? Have you included absolutely every one of your programs?

10. The next steps – We recommend showing the plan to a few outside friends to get their feedback before you make the plan official. Then,

- 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.
- Create an annual budget – Create a spreadsheet with Actions on the left and the cost of each Action in the next column.
- Send the plan to your donors.
- Post the plan, budget and timeline in the office where you, your colleagues and visitors can see it each day.

11. How do I create the 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 and C. Unclick on the box and hit Ctrl and 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 and C, then unclick and hit Ctrl and 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.

We recommend a monthly check-in to make sure you are sticking to your plan, and a six-month evaluation to see if you are making progress and whether your plan needs any alterations.

Good luck!



GROUP NAME _____

DATE _____

RESOURCES

Current or potential donors, allies, experts who can help you this year

ACTIONS

Specific activities or programs for this year

IMPACTS

Short-term measure of strategy success (1-2 yrs)

OUTCOMES

Medium-term milestones (5 to 10 years)

VISION

Long-term impact (20+ yrs)

