



## **NON PROFIT PLANNING TEMPLATE**

This document presents a provisional framework for planning in the form of a number of questions that a nonprofit can answer in different degrees of detail, depending on its capacity and inclination. The framework is designed for small to medium-sized nonprofits that want to make a bigger difference by making more strategic use of their resources. It applies to the whole nonprofit

The framework is based around five principal questions:

- 1. Why do we want to make a difference?**
- 2. What do we and others do to make a difference now?**
- 3. What difference would we like to make?**
- 4. What difference will we make?**
- 5. What will we do to make the differences happen?**

The aim of the pilot process is to explore with the participants specific ways of answering these questions

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## **PLANNING QUESTIONS**

### **1. Why do we want to make a difference?**

- a) What is the problem or opportunity we want to address?
  - i. Who or what is affected, and in what way?
  - ii. What is the need or potential? How will this be affected by any projected changes or trends?
- b) What are the causes of the problem, or what creates the potential?
- c) What specific differences do we want to see in response to these needs or potential? How would people or situations be different?
- d) What kinds of intervention and activity bring these changes about and how?

### **2. What do we and others do to make a difference now?**

- a) *What do we do currently in order to bring about the changes we want to see?*
  - i. Whom or what do we serve?
  - ii. What are our programs?
  - iii. How do they make a difference?
  - iv. What are the differences they make?
  - v. What are we particularly good at, and why?
- b) *What do other organizations do in order to bring about these changes?*
  - i. Whom or what do they serve?
  - ii. What are their programs?
  - iii. How do they make a difference?
  - iv. What differences do they make?
  - v. What are they particularly good at, and why?
- c) *Why do the combined efforts of all organizations not solve the problem?*

### **3. What difference would we like to make?**

- a) Which people have needs that are unmet, or in which area is there potential?
- b) What specific differences do we believe we can bring about in these people or these areas, assuming we can secure the resources to do so?
- c) What specific things can we do to make these differences happen,
  - i. How would we improve our current programs?
  - ii. Which of our current programs would we close or transfer to another organization?
  - iii. Which new people would we attempt to reach?
  - iv. What new programs would we introduce?
  - v. What could other organizations do in the same ways?
  - vi. How would we help them to do this?

#### 4. What difference will we make?

##### Analysis

- a) What would we need to do in order to make these changes [of the kind suggested in 3 (c) (i) – (vi)]?
  - i. What new skills and knowledge would we need to develop, and/or what new people (volunteers or staff) would we have to recruit?
  - ii. What changes or additions would we need to make to our physical assets?
  - iii. What changes or additions would we have to make to our systems and processes?
  - iv. What new relationships would we need to create?
  - v. What other changes would we need to make, e.g. in structure, procedures?
  - vi. How would we want people to behave and work differently?
- b) What would these changes cost?
- c) What resources - revenues and contributions in kind – are available that would allow us to make these changes and sustain them and the whole organization?
- d) What will help or hinder us in making these changes?

##### Decision making

- e) ***Which of the changes in our programs that we would like to make, should we make?***
  - i. ***Which change or combination of changes:***
    - ***creates the most additional difference;***
    - ***creates the lowest additional cost;***
    - ***and attracts the greatest amount of additional resources?***
  - ii. ***Which most enable us to use what we are really good at and/or a physical asset to exploit a major opportunity in the environment?***
  - iii. ***Which are the most practicable***
    - ***are easy to introduce operationally?***
    - ***are least likely to be disruptive?***
  - iv. ***Which most reflect the core values of the nonprofit?***
  - v. ***What are the risks do we face, both in making these changes, and to the organization generally: what might go wrong internally? what external threats might affect us? what will do to reduce or eliminate these effects?***
- f) As a result of the decisions to make these changes, what are our new goals for (e.g.) the next three years in terms of people/situations we want to affect and the changes we want to see in them?
- g) What are our objectives in terms of the changes we will make in order to achieve these goals, in the main areas of the organization?

- Programs
- Securing Resources
- Developing and Recruiting People
- Systems and Processes
- Structure and Procedures
- How People Behave and Work
- External relationships with other organizations in same field and people and organizations with a critical interest.

**5. What will we do to make the differences happen?**

**a)** What are the critical steps that we need to take in order to achieve these goals over the period of the plan in the following areas:

- Programs
- Securing Resources
- Developing and Recruiting People
- Systems and Processes
- Structure and Procedures
- How People Behave and Work
- External relationships with other organizations in same field and people and organizations with a critical interest.

**b)** Who is responsible in the organization for each of these critical steps?

**c)** How will we know we are succeeding in each of these areas?

**d)** What resources will we raise and spend in each of these areas during each year of the plan?