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?