



Introduction to Tools for Strategic and Operational Planning

These tools were developed and used by Ken Phillips and his colleagues with many clients and classes. They are designed to assist nonprofit organizations, community associations, and groups in formation to draft their own plans and strategies.

How to get detailed worksheets for your planning process?

They are right here. I encourage you to download these detailed versions of the worksheets from my book *Strategic Planning and Culture for Nonprofits: Clear and doable steps to create motivating plans and the supporting culture you need for success*. They are essential tools for your strategic planning and they are available on this site.

They will guide you, your staff, and other planning participants as you work to create your new plans. By following the guidance in this book and using these tools, the outcome will be an inspiring strategic plan and dynamic operational plans that empower your organization to build on past achievements, correct weaknesses, and move forward with challenging and stretching plans. Plus, you and your team will create strong core values and a vibrant organization culture that supports your strategic plans and, ultimately, contributes to making a better world.

We are intentionally making these worksheets available free and in word format so you can download them, share them electronically or in print with your planning group, and use them interactively and expansively in the planning meetings.

Smaller NGOs and community groups can simplify these tools, so the planning process can be completed in several half-day meetings or several evening sessions.

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I. Preliminary Preparation – What to Know before You Begin

Three detailed guides for planning your planning

1. What Needs to Be Done in Your Strategic Plan? A Checklist for NGOs
2. How to Prepare for Your Strategic Planning Retreat? A Checklist for NGOs
3. Agenda for a Three-Day Strategic Planning Retreat for NGOs: A Template

II. Research and Analysis before the Planning – A Toolkit for Reality

Introduction: Worksheets for Strategic Planning and Culture for Nonprofits

Guidance and ten worksheets for research tasks to base planning on reality

1. History
2. Lessons Learned from Reports and Evaluations
3. Survey Findings from Various Stakeholder Groups
4. Competitor Research – Short format
5. Current Donors Assessment – Preliminary
6. Department Director Reports
7. Confidential Interviews
8. Last Strategic Plan
9. Competitors Research – Long format
10. Preparation

III. Developing Innovative Inputs for Your Plans – A Toolkit for Innovation

Guidance and four worksheets for work in innovative thinking for planning

11. Landscape We Face
12. Dreams We Have
13. Stakeholders Assessment – Comprehensive format
14. Desired Long Term Results

IV. Drafting Your Strategic Plan – A Toolkit for Creating New Strategic Directions

Guidance and eleven worksheets for planning to establish your strategic directions

1. Key Issues To Be Addressed
2. Vision
3. Mission
4. Core Values – Short format
5. SWOT
6. Critical Issues
7. Strategic Goals
8. Key Organization Strategy – Short format
9. Strategic Positioning
10. Credibility or Trustworthiness Statement
11. Organization Culture – Short format

V. Drafting Detailed Operational Plans – A Toolkit for Operational Success

Guidance and seven worksheets for operational planning to lead you to operational success

12. List of Department Objectives
13. Operational Plans – Detailed
14. Benefits for Stakeholders
15. Organization Development Issues
16. Revenue Schedule

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17. Organization Structure
18. Next Steps

VI. Change vs Status Quo Activity

Understanding What to Change and What to Keep
A great learning experience for staff and volunteers

VII. Strong Values and Energizing Culture – “Must Do” for All Nonprofits These Days

Guidance and eight worksheets for strong values and energizing culture for success

1. Strengthening Our Core Values – What We Stand For
2. National Cultures – Introduction to Organization Culture
3. Current Culture – Initial Assessments of Our Current Behavior
4. Consensus about Our Current Culture – How We Behave Now
5. Our Desired Culture – How We Will Behave for Success
6. What Might Prevent Us from Achieving Our New Culture – Barriers
7. What Should We Do about the Barriers We Have Identified – Solutions
8. Cheerleaders and Culture Champions – Leaders for the Change

VIII. Developing the Right Strategies for Fundraising Success

1. Strategy Review
2. Twenty-Five Proven Strategies for Fundraising Success
3. A Story from My Own Work
4. Preparation to Develop Your Fundraising Strategies
5. Selection of the Right Strategies for Your Organization
6. Worksheets to Develop Your Strategies
 - I. Fundraising Strategies: Selection
 - II. Donors, Partners, and Other Stakeholders
 - III. Statement of Each Fundraising Strategy
 - IV. Objectives and Tactics for Each Strategy

For best use, please refer and use the lessons and advice contained in *Strategic Planning & Culture for Nonprofits: Clear and doable steps to create motivating plans and the supporting culture you need for success*, available on Amazon Books in both paperback and e-book.



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NGO Futures LLC - Working together through strategy, teamwork and leadership