

## Elements of an Organization Planning Process

- Review of organization's mission statement.
- Review of organization's vision, values.
- Evaluation of progress toward its goals.
- Self-evaluation of the Board.
- Examination of the external and internal environments of the nonprofit.
- Gathering of input from staff, committees, and constituents.
- Assignment of responsibilities to committees by the Board.
- Adoption of an annual budget.
- Assignment of responsibilities to committees by the Board.
- Development of work plans in pursuit of the objectives.
- Norms for how work gets done and decisions get made by the Board.
- Reporting on goals and accomplishments to the nonprofit's constituency.

## Your Organization Three Years From Now...

Daydream about your organization and what you want it to look like three years from now. What do you want for the nonprofit? Work through the following topics to get a clearer picture of where you want to be.

**Constituency** — Whom will you be serving? Will that population be different from today's? How? Who will be your members and supporters? How will they be different from your present constituency? Why?

**Program/Services** — What activities, services and programs will you be carrying out three years from now? What will the mix of those services look like? Why?

**Workforce** — What kind of staff will the organization have, both paid and volunteer? What will they be doing? What kind of qualifications and training will they have? How much will they be paid?

**Financial Resources** — What will your budget be? Where will the money come from? Describe the organization's financial situation.

**Physical Resources** — What will your office be like? Where will you be located? What equipment will you have? Will you own property?

**Community Collaboration** — Describe the relationship you will have with other organizations. With whom will you be working? How do you want to be working with them? What networks will you be connected to?

**Governance** — Describe the board of directors you want for the organization. What will be the composition? How will your constituency be involved? Who will have a part in decision making? How will the board be working together? Is it different from today? Why?

**Marketing/Public Relations** — How will you be getting your message across in the community? Who will you be targeting with that message?

**Management** — Describe how the organization will be managed? What will you be expecting of your executive director?

## Mission Statement

**Does your mission statement — your reason for existence — meet the following criteria?**

- Is it results-oriented and not activity oriented?
- Does it clearly state the business your organization is in and wants to be in the future?
- Is it realistic — is the scope of the statement appropriate to your organization, its goals and objectives?

■ Is it excelsior for which the organization exists, allowing for techniques or programs to change as circumstances vary?

■ Is it outward or client-oriented, as opposed to organizationally or inwardly bound?

■ Will the statement provide boundaries or a focus for organizational planning?

■ If the statement were printed in the newspaper, would everyone in the community understand the nature of the organization?

## Considerations in Making a Planning Calendar

A well organized and thorough annual planning calendar must include the following:

- When the fiscal year begins.
- When the regular Board meetings are scheduled. If special accommodations are required, these should be arranged for well in advance of the actual meeting, and the requisite tasks should be included in the calendar.
- When major funding proposals are due. A flow sheet so progress can be tracked will help reduce deadline stresses.
- When Board members are elected.
- When the annual meeting takes place. Be sure to include and schedule event planning details as thoroughly as possible.
- When other special events or activities are scheduled.
- Who will be responsible for making sure the calendar is revised as necessary and the schedule deadlines are being met?

## Developing Goals and Objectives

People and organizations often get bogged down in semantics over what a goal is supposed to look like, what an objective is, and how to distinguish the two. Goals say what you want to accomplish. Objectives say how you intend to go about accomplishing your goals. Work plans say who will do what, by when, using what resources, to meet objectives and accomplish goals. What really matters is simply that the planning group agrees on what criteria goals and objectives should meet for your organization at this time. The following are a list of characteristics of good goals and objectives:

### *Good goals should...*

- Be a statement of **end**, not of means.
- Reflect what you **want**, not what you're doing.
- Be **realistic** enough to be implemented within the organization's resources.
- Show some "stretch."
- Describe achievement that is **measurable**.
- Be **qualitative** as well as measurable.

### *Good objectives specify...*

- A particular intended **outcome**.
- A **time frame** in which the outcome will be reached.
- **Methods** by which the outcome will be pursued.
- A minimum of **acceptability**.

## Additional Resources:

*Strategic Planning Workbook for Nonprofit Organizations* Contact: A.H. Wilder Foundation Publishing Center (800) 274-6024 or visit [www.wilder.org/pub](http://www.wilder.org/pub)

*Drucker Foundation Self-Assessment Tool for Nonprofit Organizations* Contact: Jossey-Bass Publishers (415) 433-1740 or visit [www.josseybass.com](http://www.josseybass.com)

*Strategic Planning for Nonprofit Organizations* Contact: National Trust for Historic Preservation (202) 588-6296 or visit [www.nthp.org](http://www.nthp.org)

*Strategic Planning for Public and Nonprofit Organizations* Contact: Jossey-Bass Publishers (415) 433-1740 or visit [www.josseybass.com](http://www.josseybass.com)

*Getting Started on Strategic Planning* Contact: Jossey-Bass Publishers (415) 433-1740 or visit [www.josseybass.com](http://www.josseybass.com)

*Handbook of Practical Program Evaluation* Contact: Jossey-Bass Publishers (415) 433-1740 or visit [www.josseybass.com](http://www.josseybass.com)

*The Board Member's Guide to Strategic Planning: A Practical Approach to Strengthening Nonprofit Organizations* Contact: Jossey-Bass Publishers (415) 433-1740 or visit [www.josseybass.com](http://www.josseybass.com)

*The Budget-Building Book for Nonprofits: A Step-by-Step Guide for Managers and Boards.* Contact: Jossey Bass Publishers (415) 433-1740 or visit [www.josseybass.com](http://www.josseybass.com)

*Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations* Contact: Jossey Bass Publishers (415) 433-1740 or Visit [www.josseybass.com](http://www.josseybass.com)

*Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook.* Visit [www.wiley.com](http://www.wiley.com)

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