Overall Strategic Plan

For New Nonprofits

- I. Executive Summary
- 1-2 page overview of entire plan's key points

ADVICE: Lead the Executive Summary with a strong mission statement that conveys your core purpose. Spotlight major accomplishments and impressive metrics that will capture donor attention.

- II. Organization Overview
- Mission statement articulating purpose
- List of core values
- Brief history and milestones
- Populations served and demographics
- Current programs and accomplishments
- Past impact and measurable outcomes
- SWOT analysis
- Future growth plans

ADVICE: Put extra emphasis on the mission statement to make sure it clearly conveys your purpose and passion. Select key accomplishments, awards, and statistics to showcase that directly align with donor priorities. Highlight programs that match donor interests.

- III. Goals
- 3-5 long-term goals
- Short-term goals aligning to long-term

ADVICE: Demonstrate how the long-term and short-term goals address specific community needs and trends that donors will care about. Show the logical connections between long and short term goals.

IV. Strategies and Activities

- Detail on current programs
- New program implementation plans
- Program communication strategies

ADVICE: Thoroughly describe specific programs and interventions that closely match donor priorities. Include powerful statistics, measurable outcomes, and client success stories that will resonate with donors.

V. Partnerships and Collaborations

- Inventory of current partnerships
- New partnership opportunities

ADVICE: Namedrop partners and collaborators that will pique donor interest and attract attention. Emphasize shared values and goals between your organization and partners.

VI. Personnel

- Board and staff list
- Staff org chart
- Volunteer needs

ADVICE: Introduce senior leadership profiles that highlight relevant expertise and impress donors. Provide organizational chart to showcase key staff capabilities. Highlight volunteer engagement and contributions.

VII. Finances

- Budget overview
- Deficits or events affecting budget
- Funding needs and sources

ADVICE: Convey financial efficiency, accountability and transparency. Articulate your greatest funding needs tied directly to strategic goals and growth plans.

VIII. Monitoring and Evaluation

- Program metrics and measures
- Data collection procedures
- Progress reporting schedule

ADVICE: Emphasize your commitment to rigorously measuring outcomes and impact. Link metrics and KPIs directly to strategic goals and donor priorities.

- IX. Conclusion and Call to Action
- Summary of key goals and strategies
- Inspiring conclusion
- Call to action for stakeholders

ADVICE: Close with an inspiring vision for change in the community and a clear call to action for donors to get involved. Reiterate shared values and commitment to community impact.

For Existing Nonprofits

- I. Executive Summary
- Snapshot of key plan elements
- Showcase impressive metrics

ADVICE: Lead with exciting mission and history. Spotlight major accomplishments and outcomes aligned with donor priorities.

- II. Organization Overview
- Background on founding and evolution
- Expand on mission, values, purpose
- Highlights of past accomplishments
- Success stories showing impact

ADVICE: Share compelling history that sets context. Showcase mission-focused outcomes over time, emphasizing donor alignment. Bring stories to life.

- III. Organizational History
- Details on founding, key milestones
- Growth in clients, reach, staff
- Evolution of business model and capabilities

ADVICE: Feature milestones that make donors confident in track record. Demonstrate expanding community benefit over time.

IV. Past Performance

- Metrics, results over past 3-5 years
- Progress made on past strategic plans
- Success benchmarked against peers

ADVICE: Quantify past outcomes aligned to donor priorities. Show steady improvement. Reference recognitions and awards. Convey commitment to learning.

V. Case for Support

- Client success stories
- Testimonials from community
- Powerful examples of ongoing need

ADVICE: Personalize need through compelling stories. Show diversity in populations and geographies served. Demonstrate stewardship of stories shared.

VI. Current Programs

- Details on existing core programs
- Populations served, outcomes achieved
- Benefits to community delivered

ADVICE: Thoroughly describe current programs doing work donors care about. Quantify benefits and highlight innovations.

VII. Facilities/Assets

- Locations, technology platforms
- Specialized equipment or assets that set apart
- Investments supporting efficiency

ADVICE: Convey maturity and higher capacity through holdings. Note investments that improve service and stewardship.

VIII. New Strategic Goals

- Ambitious long-term goals

- Short-term goals supporting them

ADVICE: Demonstrate evolution of goals while staying true to mission. Explain rationale for new directions to inspire donors.

- IX. Funding Needs and Requests
- Specific funding amounts requested
- Highest priority needs and gaps
- New initiative descriptions

ADVICE: Make direct funding asks aligned to strategic goals. Breakdown uses of funds and expected ROI. Be transparent about gaps.

- X. Leadership Continuity
- Long-tenured staff and board bios
- Celebrate low turnover
- Mountain of expertise represented

ADVICE: Long tenure conveys stability amidst growth. Highlight diverse experiences and passion of leadership team.

Individual Program Plans

- I. Program Overview
- Official name of the program
- 2-3 sentence summary of purpose and activities
- Overview of how activities achieve purpose
- Target population details

ADVICE: Choose a program name that conveys purpose. Summarize in inspiring language. Highlight activities donors will care about. Spotlight target demographics that will resonate.

- II. Alignment to Goals
- Explain alignment to org's strategic goals
- Clarify specific objectives addressed

ADVICE: Demonstrate direct linkage between program goals and organization's broader strategic goals. Show how program addresses organization's objectives.

- III. Need and Intended Impact
- Describe community need addressed
- Outline intended impact

ADVICE: Bring any statistics and data on community needs and problems to life with human stories and examples. Make the case for support. Vividly convey the change and impact sought.

IV. Implementation Plan

- Description of program operations
- Step-by-step implementation plan
- Resources required

- Budget overview

ADVICE: Emphasize efficiency, expertise, and capabilities to implement the program successfully. Break budget down into greatest needs and funding gaps.

V. Partnerships

- Current partners and roles
- New partners to engage
- Partnership development plans

ADVICE: Identify partners that will interest donors and convey shared goals. Highlight partner contributions and amplifying effect.

VI. Personnel

- Staffing requirements
- Volunteer recruitment and roles

ADVICE: Note experienced staff who will elevate confidence in success. Quantify volunteer needs and highlight opportunities for donor involvement.

VII. Communications Plan

- Key messages
- Channels and outreach strategies

ADVICE: Tailor messages and stories to inspire donors. Spotlight communications channels that provide donor visibility.

VIII. Fund Development

- Current funding secured
- Additional funding needed

- Fundraising plans and timeline

ADVICE: Be specific about funding gaps and amounts needed from donors. Show clear ROI. Describe tactics to steward and recognize donors.

- IX. Measurement and Evaluation
- Metrics tied to goals
- Data tracking procedures
- Reporting schedule

ADVICE: Link metrics directly to donor priorities like lives impacted. Convey commitment to sharing progress and honoring investment.

- X. Sustainability Plans
- Strategies for ongoing viability
- Plans to improve and expand

ADVICE: Demonstrate good stewardship of donor funds. Share vision for long-term positive change through program growth and innovation.