


Learning Collaborative
Nonprofit Basics:

BUILDING A WORK PLAN

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MISSION & VISION

as a Call to Action

- **Mission:** Organization's Purpose
who you serve, how you serve, and what you do everyday
- **Vision:** Organization's Impact Guiding Star
your dream for changing the world




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Nonprofit CHALLENGES

What challenges
do you face in
bringing mission
to action?




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STRATEGIC PLAN

Created By Board & Leadership
frames mission, vision, and values. Includes a in-depth review of stakeholder needs; org opportunities, challenges, strengths, and weaknesses to create a plan grounded in context

Big Picture Priorities Over Several Years
Clarifies overarching goals and strategies for growth and/or sustainability over a period of time (typically 2-5 years). Serves as a roadmap to determine which efforts will keep org driving towards mission & vision.

Defines What Success Looks like
Includes defined objectives to help track progress towards goals.






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WORK PLAN

**A visual overview of putting
organizational goals into action**

- Sets the strategy for achieving a goal
- Describes objectives & tactics for reaching your goal
- Establishes a budget
- Defines team responsibilities
- Sets project timelines & milestones
- Defines expected deliverables

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GOALS & STRATEGIES

- **GOALS:**
the end result you seek
- **STRATEGY:**
the approach you will take to achieve your goal



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OBJECTIVES & TACTICS


OBJECTIVES: the accountability markers you will use to track progress toward your goal



TACTICS: specific tools or techniques you will use to execute on a strategy



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BUDGET & RESOURCES

BUDGET:

- What funds will pay for these activities? Are there restrictions on how the funds can be used?
- What costs are associated with carrying out the work to accomplish the goal: staffing costs, supplies, venues, food, operations costs?
- Any expected income from the activities?

ADDITIONAL RESOURCES:

- Are there other resources you will need to carry out this plan? People, expertise, access?



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ROLES & RESPONSIBILITIES

TEAM MEMBER ROLES:


- What are the expected duties of each member of the team?
- What tasks are assigned to whom?
- How will you communicate, collaborate, and stay on track as a team?



Taking the time to get very clear on responsibilities up front will pay off as you execute your work plan




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MAPPING YOUR TIMELINE

• **Considerations:**

- Task Sequence Needs
- Team Availability
- External Timing Factors
- Expected Challenges
- Realistic Deadlines (when self-created)



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DELIVERABLES

Internal Process Deliverables: help internal process move forward	External Process Deliverables: help external process move forward
Internal Project Deliverables: meets an internal project end goal	External Project Deliverable: meets external product end goal



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Case Study: The Emerging Changemakers

Strategic Goals

- 1) Raise market rate salary funds to hire first paid staff member by end of year
- 2) Recruit 3 new Board Members with legal, finance, and policy expertise by June 30th
- 3) Build website with detailed service menu and client portal by April 30th



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The Emerging Changemakers Work Plan

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|--|---|
| Goal:
Raise market rate salary funds to hire first paid staff member by end of year | Strategy:
Cultivate private donor relationships |
| Objectives: <ul style="list-style-type: none"> Board will host a summer fundraiser event with a target of net \$20,000 raised Each Board Member will get (from donors) or give (themselves) an additional \$5,000 by Dec. | Tactics: <ul style="list-style-type: none"> Reach out to Board Networks Donor cultivation meetings with engaged constituents Research donors who give to like-minded causes |



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The Emerging Changemakers Work Plan

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|--|--|
| Budget & Resources:
\$4500 for marketing, donor meetings, venue/supplies/costs for event | Roles: <ul style="list-style-type: none"> Event Lead, Communications Lead, Donor Tracking |
| Timeline: <ul style="list-style-type: none"> Q1: Donor outreach mapping & networking activities Q2: Event planning and outreach Q3: Donor Event & Fall engagement planning Q4: Final outreach activities to meet target | Deliverables: <ul style="list-style-type: none"> Board Network Map Donor Prospects List Event Evaluation Annual Report on Donor Engagement and Successes for the Year |



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Your Turn: Goal #2

- | | |
|--|----------------------|
| Goal: <ul style="list-style-type: none"> Recruit 3 new Board Members with legal, finance, and policy expertise | Strategy: |
| Objectives: | Tactics: |
| Budget & Resources: | Roles: |
| Timeline: | Deliverables: |



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Your Turn: Goal #3

- | | |
|---|----------------------|
| Goal: <ul style="list-style-type: none"> Build website with detailed service menu and client portal by April 30th | Strategy: |
| Objectives: | Tactics: |
| Budget & Resources: | Roles: |
| Timeline: | Deliverables: |



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IMPACT OPPORTUNITY

- Reflections:**
- What opportunities do you see for your org in using a work plan like this?



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QUESTIONS?



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Your Assignment:
Create a Workplan using
template for 3 Organizational
Goals before we meet next



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Questions?



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