# Outline of an Organizational Plan

(***Note:*** This is a detailed outline of how one might present an organizational plan. We’ve added every possible item that *might* be included. Feel free to omit sections that aren’t relevant to your organization.)

1. **Introduction/Overview of Plan**

Reasons and process for planning. Who was involved in planning activity? How was consensus reached? Key themes that emerged in planning.

1. **Executive Summary of Plan**

Pull out a few (three to five) key themes that have emerged in the planning process.

Briefly describe the content outlined below.

1. **Brief Organization History**
2. **Mission Statement**
3. **Vision of the Organization**

* How the organization is distinct from others in its field of service
* How its field of endeavor is changing
* How it is responding to changing conditions

1. **Values and Operating Principles**

* Societal value of the organization’s work
* Values embedded in the organization’s approach to providing services
* Inclusiveness values, such as diversity and accessibility
* Relationship of the organization to others in its field
* How the organization’s values are enacted through its policies

1. **Summary of Goals Looking Forward** (Not every plan will identify goals in every one of these areas.)

* Program goals
* Personnel goals
* Public relations and marketing goals
* Fundraising and earned revenues goals
* Facilities goals
* Financial management goals
* Board governance goals

1. **Key Strategic Areas of Development, Growth, or Change Identified in Planning**

Your plan may focus on several of the areas identified below (and likely not on all of them or your plan will be too ambitious).

1. Programs and Services
2. Description of program one, outline of goals, and list of strategies for achieving goals
3. Description of program two, outline of goals, and list of strategies for achieving goals
4. Description of program three, outline of goals, and list of strategies for achieving goals
5. Organization Administration, Finances, and Leadership

A. Personnel

1. Description of work environment, distribution of tasks, workload, and compensation
2. Goals for personnel
3. Professional development of staff
4. Strategies for achieving goals

B. Public relations and marketing

1. Target audiences
2. Goals for increasing public participation in programs
3. Elements of message to be communicated
4. Strategies for reaching target audiences with message
5. Resource development
6. Fundraising goals to support strategic plan and strategies for achieving those goals
7. Earned revenues needed to support strategic plan and strategies for achieving those goals
8. Financial management
9. Current financial management staffing and systems
10. Current financial policies and procedures
11. Strategies for strengthening financial systems
12. Facilities and other assets
13. Goals for facilities and major equipment
14. Policies for maintenance, upgrades, and renovation
15. Strategies for achieving goals
16. Board of directors and advisory boards
17. Role of board of directors
18. Current composition of board of directors
19. Board policies and training
20. Board giving and fundraising
21. Strategies for recruitment, training, and revising policies
22. **APPENDICES**
23. Projected budgets for the coming three years
24. Organizational chart
25. Detailed outline of programs
26. Community partners
27. Facilities development master plan