



## Operational Planning Overview

There are three basic components, which make up all operational plans.

Goals  
Objectives  
Action steps

### Organizing the Plan

Once you have completed a strategic planning process the next step is to operationalize the strategic plan. A simple way to organize the process and the resulting annual plan is to delineate among the three aspects of the organization included in all institutional planning: program, organization and development.

**Program** includes all services the organization provides in the community (cultural, educational, social or human, etc.):

- Identify specific program goals including service programs, workshops and training, advocacy and other programs and series provided by your organization and/or identified in the key documents.
- Other

**Organization** refers to staff and board composition, growth, development and management:

- Recruitment and donor development (identify specific donor growth goals and methods of obtaining new members, i.e. direct mail, phone banks, major donor, grants, events, donor renewal etc.)
- Volunteer and Leadership Development (identify specific training, volunteer orientation, leadership, accountability goals)
- Staff (identify hiring goals, professional skills development/training goals, personnel policy goals, performance evaluations goals)
- Administration and Planning (identify specific accounting, office systems, computers and equipment, office space, strategic planning, management infrastructure goals)
- Other

**Development** includes the organization's external image and contacts, including marketing, public relations and fundraising:

- Fundraising (identify specific methods and target goals the organization will use to fundraise, i.e., direct mail, grants, major donor, donor renewal, events, phone banks, acquisition etc. and specific ways to increase Board member and activist involvement, changes or new fundraising projects for the organization)
- Media (identify specific public relations activities such as press conferences, development of relationships with reporters who are assigned to health/political/education issues etc. and marketing strategies use of brochures, training materials, videos, etc.)
- Communications (Identify the goals for the number of newsletters, publications, videos, brochures to be developed and how they will be distributed)
- Coalition Building (Identify the specific goals associated with coalition building including who, what, when, how and the purpose/mission of the coalition)
- Other

### About Beth Applegate, Principal Consultant

**Beth Applegate** is the principal of Applegate Consulting Group (ACG), an organization development (OD) practice that assists national and international nonprofit organizations, government agencies and socially responsible for-profit corporations with developing human and organizational capacity and building a more just and equitable society. Our work is inextricably linked to advancing democratic processes and humanistic values. Beth Applegate can be reached at [Beth@applegateonline.com](mailto:Beth@applegateonline.com).