Funding provided by U.S. Embassy Belmopan

New (or revised) NGO Development Plan Toolkit

Muthusami Kumaran, Ph.D. Associate Professor of Nonprofit Management, University of Florida

The purpose of a systematically assembled Development Plan is to have a strong foundation for a successful and sustainable NGO. Completing a Development Plan may seem daunting, but if the leaders of an NGO strive to carefully follow various steps covered in this Toolkit, the Plan will provide a blueprint for vital management functions of the organization.

Note: An example of a completed Development Plan by a graduate student in my course "Nonprofit Organizations" is provided as a separate pdf document for your reference.

Formatting Notes:

1. Include a cover page with yout new or existing NGO's name, logo & a tagline

2. Include table of contents with required sections and page numbers

3. Organize development plan according to the sections below

4. You may use appendices if needed, and include them in the table of contents

5. Make sure the final document appears professional.

SECTION 1: RATIONALE FOR STARTING THE NEW NGO

1. The Issue Statement: NGOs exist to provide certain services to address specific need(s). Think carefully about the issue your new NGO will address and/or the need it will serve. Describe the conditions that lead to the issue, extent of the issue, severity of the issue, and their consequences (include geographic area and population affected)
2. The Needs Assessment: demonstrate the need of specific services to address the issue in the community
3. Who else is addressing the issue and what are their outcomes? (other NGOs, government, private organizations, etc.)
4. What will happen if the issue is not addressed?
5. What is missing or needs to be done differently?
6. Describe specific needs that your new organization will address

SECTION 2: ORGANIZATIONAL CONCEPT

1. Mission statement (statement of purpose for the NGO)
2. Vision statement (ideal vision of the organization)
3. Core values statement (what brings people together to work, volunteer and serve the organization)
4. Uniqueness of your organization within the context of the issue addressed and population served

SECTION 3: GOVERNANCE

Governance is the process of collective decision making by the Board of an NGO to pursue its mission.

A. Board Development

1. Broad roles of the Board in fulfilling the organizational mission
2. Ideal characteristics of Board members (expertise, values, interests, skills, etc.)
3. Duties and responsibilities of the Board
4. Potential new Board member recruitment strategies and orientation

B. Description of the Board

1. Size of the Board (number of members, terms, term limits, etc.)
2. Board meetings - frequency, quorum for voting, draft agenda items for the first meeting
3. Officers of the Board and Position Descriptions
4. Committees of the Board and their Functions

C. Executive Director and Relationship to the Board

SECTION 4: GOVERNING DOCUMENTS

1. Articles of Incorporation
2. Bylaws (policies & procedures by which the NGO's Board operate)
3. Application of Determination of Exemption

SECTION 5: PROGRAM PLANNING AND EVALUATION

A. Program Plan

1. Target audience and demographic/socioeconomic characteristics
2. Program goals - at least three goals
3. Program objectives - at least two objective for each goal
4. Program strategies and details (location, methods of delivery, frequency, etc.)
5. Resources needed (funding, staff, volunteers, space, equipment, etc.)
6. A logic model for each objective* (your assignment must have at least six logic model pages, one per objective)

B. Program Evaluation Plan

1. Structure of process and outcome evaluation
2. Identification of evaluation team

3.   Target audience for evaluation
4.   Evaluation questions
5.   Methodology, data collection, and analysis
6.   Evaluation reporting

SECTION 6: HUMAN RESOURCES MANAGEMENT

1.   Paid staffing needs (refer to your program plan in assignment #3)
2.   Job position descriptions (requirements, qualifications, experience, duties, etc.)
3.   Recruitment process and strategies
4.   Relevant personnel policies*
5.   Training and retention

SECTION 7: FINANCIAL STATEMENTS

1.   Annual Budget for first fiscal year
2.   Statement of Financial Position
3.   Statement of Activities
4.   Statement of Cash Flow

SECTION 8: FUND RAISING

1.   The case statement for support
2.   Potential sources of revenue
3.   Fundraising goals for the first fiscal year
4.   Modes and methods of fundraising

SECTION 9: VOLUNTEER MANAGEMENT

A.   Need for volunteers

B.   Recruitment

1.   Job Descriptions
2.   Requirements
3.   Application
4.   Screening Tools

C.   Orientation and Training

1.   Alignment to mission and organizational culture
2.   Clarification of expectations for volunteers and organization
3.   Orientation and training procedures (frequency, resources needed, supervision, training on specific activities etc.)

D.   Evaluation of volunteers

E.   Recognition of volunteers

SECTION 10: MARKETING AND COMMUNITY RELATIONS

A.   Marketing Plan

    1.   Segmentation and target audience
    2.   Marketing goals and objectives
    3.   Branding
    4.   Evaluation

B.   Community Relations

    1.   Key messages
    2.   Delivery methods (annual reports, quarterly reports, electronic bulletins, etc.)
    3.   Working with the media

SECTION 11: ETHICS, TRANSPARECY, AND ACCOUNTABILITY

    1.   Code of Ethics and adherence
    2.   Transparency measures (funding, operations, staff, etc.)
    3.   Accountability measures – to funders, members, clients, etc.

SECTION 12: RISK MANAGEMENT

A.   Identification of Major Risk Areas

    1.   Governance-related risk
    2.   Administration-related risk (financial management, HR, etc.)
    3.   Operations-related risk

B.   Risk Treatment and Mitigation Strategies

    1.   Governance-related risk
    2.   Administration-related risk (financial management, HR, etc.)
    3.   Operations-related risk