

## **The One-Page Strategic Plan**

*Accepted for Publication in 2008 by Advancing Philanthropy*

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Have you ever asked someone the mission of their organization? You'll frequently hear them respond, "We have a copy of that around here somewhere!"

Or maybe you asked about a strategic plan and heard this: "Yes, we have one, but it's so long, we never look at it." As a strategic planning consultant, I have indeed asked these questions, and heard all these answers and more. They always make me wonder, as about the proverbial tree falling in the forest: What impact do mission and strategic goals have if no one in the organization can name (and even find) them?

Now let's imagine a different scenario. Picture an organization where every individual can name the strategic opportunities and threats facing it. And everyone can articulate the organization's mission, vision and values too... and from memory! And they can state their organization's top five initiatives in the coming five years and the success metrics by which they'll be judged. And do the same for the coming year, as well as for the coming quarter. Lastly, everyone can identify how what they are personally doing right now relates to all of the above. Imagine how productive such a highly aligned organization would be. What has to happen to bring this about?

Fortunately, there is a way, and it's a simple yet powerful idea: the one-page strategic plan. You would start by condensing all the great work found in the typical 30-page strategic plan into a single page (okay, we'll cheat and use both sides). Doing so:

- Forces us to distill the plan to its essence, requiring great discipline;
- Makes that essence widely available in a form that is easy to read and review;
- Builds a bridge between the big picture, the five-year view, the one-year view, the quarterly view, and what everyone will be doing on Monday morning.

This idea for the one-page strategic plan is inspired by the highly successful work of Verne Harnish with fast-growth companies, where focus and execution can mean the difference between brilliant success and flaming failure. The one-page strategic plan starts with a standard template that you customize to the unique needs of your organization. You can download a Word editable copy at <http://www.peoplesworth.com/OnePageStrategicPlanTemplate.doc>

If you already have a wonderful (yet lengthy) strategic plan, use it to complete your template. If you don't, you may yet need to make one. The one-page strategic plan is no substitute for extensive, deliberative strategic planning – it simply makes the results more accessible, and therefore more powerful.

Here are the basic elements, starting with the big picture and working backwards toward Monday morning:

<b>Opportunities</b>
<b>Threats</b>

Your one-page strategic plan lists the top five opportunities that everyone should know because any of them could dramatically improve the organization’s performance over plan. Similarly, the one-page strategic plan lists the top five threats that could dramatically undermine the organization’s performance.

Example: Golden Tones, a senior chorus, has “Aging Baby Boomers” on its short list of opportunities, and “Longtime members passing on” on its short list of threats.

<b>Mission</b>
<b>Vision</b>
<b>Values</b>

Your one-page strategic plan identifies your organization’s key guiding ideas, which typically include its mission, vision, and values. These are the critical few ideas that help people say yes to the right things and no to the rest. The mission classically answers two (and only two) key questions:

1. Why do you exist (your ultimate aim or result)?
2. Who do you serve (your primary beneficiary or customer)?

For example, the Massachusetts Audubon Society says it simply: “To protect the nature of Massachusetts.” The late Peter Drucker, noted management theorist, used to say he preferred a mission that fits on a tee-shirt. The Audubon’s would have pleased him.

The plan also defines your vision - what you aspire to be or do some distance (five to thirty years) down the road. To understand better why and how this works, read Jim Collins’ inspiring work on BHAGs (Big Hairy Audacious Goals) set by great organizations in his book *Good to Great*.

For example, Big Brother Big Sister of Central Massachusetts has a vision to “Never say ‘no’ to a child in need of our services in our MetroWest communities, contributing to better schools, brighter futures, and stronger communities for all.” They’re not close to fulfilling this vision yet, but they’re on their way.

Lastly, your plan articulates your values – what you care about that you never compromise, no matter what else changes.

For example, The Children’s Room, a support center for grieving children, spells out the four essential principles guiding its work with grief and healing. Another example would be The Fuller Museum of Craft which shares its definition of craft, and how it is different from art.

<b>Five-Year Targets</b>
<b>Five-Year Impact Goals</b>
<b>Five-Year Infrastructure Goals</b>

Your one-page strategic plan enumerates key targets for success in five years, including both activity and outcome measures. Activity measures indicate your level of effort, e.g., how many people you serve. Outcome measures indicate your level of impact, e.g., how those people are helped. Together these targets answer the question: When you are successful, how will you know?

Example: A Suitable Image, a resource for women’s wardrobes and appearance coaching, aims to serve 425 women per year over five years, and targets a rate above 65% of those women served still employed after six months.

The plan defines your top five goals over five years in terms of program impact – how your organization will change the lives of your principal beneficiaries (remember the mission?) for the better. Similarly, it defines the top five “back office” goals that will most enhance organizational infrastructure (and thereby better achieve your mission) over five years.

An example here would be the Massachusetts Audubon Society which defines key deliverables in each of their top three impact areas: advocacy, conservation, and education. Major infrastructure goals include technology, development, and staff development. Then there’s Bunker Hill Community College which defines key deliverables in impact areas such as student success goals and civic engagement and leadership. Its infrastructure goals have included funding, technology, and curricula.

To give further focus, you can define the Top One of Five in each category throughout the one-page strategic plan. The work of the preceding three segments gives us one side of our single page! The other side brings us back to Monday morning.

<b>One-Year Targets</b>
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<b><i>One-Year Impact Goals</i></b>
<b><i>One-Year Infrastructure Goals</i></b>

This segment of the template repeats the earlier structure, focusing now on targets, impact goals, and infrastructure goals for a one-year time frame. An organization’s one-page strategic plan posts its overall goals here, whereas each of its departments can instead insert their own goals, thus specifying their unique contribution to the whole.

For example, the start-up Massachusetts Nonprofit Network, a statewide association of nonprofits, aims to deliver specific policy wins, and concrete member services, to its members in its first year. Its first year infrastructure goals include developing the board, hiring an Executive Director, and mobilizing a development strategy.

<b><i>Quarterly Targets</i></b>	<b><i>Monthly Targets</i></b>
<b><i>Quarterly Impact Goals</i></b>	<b><i>Monthly Impact Goals</i></b>
<b><i>Quarterly Infrastructure Goals</i></b>	<b><i>Monthly Infrastructure Goals</i></b>

The next two segments of the template repeat the earlier structure yet again, focusing this time on the quarterly and monthly time frame (or weekly, if you prefer, which brings you back to Monday morning). As before, the organization may post its top-level quarterly targets and goals in an overall plan but expect each department to define its own, which will likely mean more to the average employee.

You have now condensed the typical thirty-page strategic plan into a one-page document. Everyone in the organization can easily read it and review it. The organization will want to reset its goals and targets at least annually. Each department will want to reset their goals and targets at least quarterly. Each individual will want to reset his or her goals and targets at least monthly, if not weekly.

The brevity and ease of use of the one-page strategic plan means that its goals and targets can provide the focus for annual, quarterly, monthly, weekly, and yes, even brief daily meetings. Once people know what they are trying to accomplish, they welcome regular feedback on their progress. The one-page strategic plan makes the organization’s guiding ideas, success metrics, and key initiatives transparent, and therefore accessible, and finally, highly useful.

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