**Strategy Planning Worksheet**

*The following questionnaire has been designed to procure basic information about your organisation and its functions. Compiling all relevant information in a single document will help you to complete the business planning accurately and in a timely manner.*

**Section 1: General Information**

1. **Describe your organization’s model, your target group and your current reach?**

*Example:*

**Atma’s model**: Expertise in capacity building of Education NGOs through consultancy, skilled volunteers, trainings and workshops.

**Target group**: Educational NGOs

**Current reach:** 21 NGOs in Mumbai

1. **What are your organization’s main programmes what is their purpose/goal? Give a brief description of each programme.**

*Example:*

**Programme name**: Atma Partnership Programme

**Goal:** To create high impact educational NGOs

**Objective/s:** To strengthen partners in 10 key organizational development areas; to build capacity of leaders and their teams through trainings and workshops.

**Description:** The programme offers 3 core services:

* *Consultancy:* Strategic planning and capacity building with NGO leaders across 10 organizational development areas.
* *Skilled volunteers:* Implementation of projects determined by priority areas.
* *Trainings and workshops:* Capacity building within the leadership and team through internal and external trainings.

1. **How do you evaluate your programmes and how often? What measures do you use to evaluate your programs?**

*Atma Example:*

**Annual Partnership Review:** Partners complete survey rating Atma’s services and projects undertaken during year.

**Project Management:** Project monitoring and evaluation through Salesforce.

1. **What are your success indicators? Has there been a change in your success indicators in the past few years? If so, explain how and why.**

*Atma Example:*

**Quarterly Plans**: If all projects planned for each partner are completed.

**Outcomes Map:** Ifafter completion of a project partner has moved to next level.

**Education Outcomes:** If learning outcomes of beneficiaries have increased.

**Change:** Yes, originally we gauged success only on outputs created for partners. However, we realized that we had to look at the long term changes within the partner organizations and how these impact the children and youth they work with.

1. **Briefly describe few success stories of your NGO.**

*Atma Example:*

* Grew from 5 to 21 partners and reaches out to over 30,000 children through our partners.
* 70% of Atma’s current partners have increased their fundraising capacity since the start of Atma’s intervention.
* 25% of Atma’s current partners have doubled the number of children they reach.

1. **How does your organization ensure accountability?**

*Atma Example:*

* **Board:** Quarterly reports for board members and board meetings.
* **Staff:** Annual performance appraisals and weekly meetings.
* **Partners:** Annual survey and project reviews.
* **Volunteers:** Mid-term and exit reviews and weekly meetings.
* **Donors:** Publication of annual reports and audited financial reports and regular updates through newsletter.

**Section 2: Financial Information**

1. **What was the operating budget of your organization in 2012-2013, 2013-2014 and 2014-15? Give a breakdown of your operating budget for each year.**

**2012-2013**

*Example:*

**Total:** 30L

**Partnership Programme:** 12L

**Volunteer Programme:** 4L

**Admin:** 14L

**2013-2014**

**2014-2015**

1. **What/who have been your main sources of funding in 2013-14? What programmes have you used the funding for?**

**2013-2014**

*Example*

|  |  |  |
| --- | --- | --- |
| **FUNDER** | **AMOUNT (Rs)** | **PROGRAMME/S** |
| Individuals | 12,00,000 | Volunteer Programme and Admin |
| HDFC Bank | 3,00,000 | Partnership Programme |
| Biguine | 9,00,000 | Partnership Programme |
| Mumbai Marathon | 5,00,000 | Admin |
| Investments | 1,00,000 | Admin |
| **TOTAL INCOME:** | **30,00,000** |  |