Logic Models, Theories of Change, and Strategic Plans:

How to Help Funders Understand Your Impact

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SARAH COTTON NELSON
Communities Foundation of Texas
SNELSON@CFTEXAS.ORG

SUZANNE SMITH
Social Impact Architects
SUZANNE@SOCIALIMPACTARCHITECTS.COM

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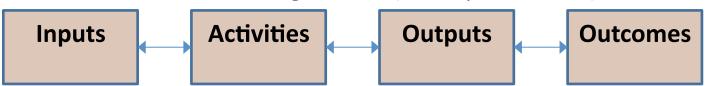   - Sample International Strategic Plans
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Logic Models
Overview of Framework

Logic Models: Overview

Basic Logic Model (developed in 1970s)

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┌──────────┐     ┌────────────┐     ┌──────────┐     ┌──────────┐
│  Inputs  │ ←→  │ Activities │ ←→  │ Outputs  │ ←→  │ Outcomes │
└──────────┘     └────────────┘     └──────────┘     └──────────┘
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What Is a Logic Model?
- A picture or a description of how the program works
- A simple representation of the program "theory" explaining what the program will accomplish
- A way to show relationships between what we put in, what we do, and results

Uses of Logic Models:
- Design programs
- Plan evaluations
- Demonstrate outcomes and impact to constituents
- Direct the efforts of staff in data collection
- Make program adjustments based on data

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Logic Models: Overview cont'd

International Use:

- Although many programs use logic models, some international programs are now using USAID's logical framework (logframe).

Some differences with basic logic model:

- Model includes information on Data Sources which is useful for evaluations.
- It omits the Activities section, requiring users to connect the dots on how the inputs and assumptions create the desired outputs.

USAID LogFrame (Developed in 1970s)

Narrative Summary	Indicators	Data Sources	Assumptions
Goal	Then Goal		
Purpose	If Purpose Then Purpose		And Assumptions
Sub-Purpose	If Sub-Purposes Then Sub-Purposes		And Assumptions
Outputs	If Outputs Then Outputs		And Assumptions
Inputs	If Inputs		And Assumptions

Note: The examples presented in this material are based on the United Way logic model.

Source: USAID; *Technical Note: The Logical Framework*; 2012.

Logic Models

case example:
a tuberculosis program

A Tuberculosis Program Logic Model

In order to accomplish our set of activities we will need the following:

Mission: To improve well-being by a collaborative effort to reduce the incidence of tuberculosis

Inputs
- Trained staff
- Health info systems
- Clinics, labs, pharmacies
- Effective organizations

Activities

Outputs

Outcomes

Context: Eroding infrastructure for public health; community mistrust of government; new diseases such as HIV/ AIDS increasing susceptibility to TB; increasing rates of incarceration creating new settings for transmitting TB; and certain strains of TB becoming drug resistant

A Tuberculosis Program Logic Model

In order to address our problem or asset, we will conduct the following activities:

Mission: To improve well-being by a collaborative effort to reduce the incidence of tuberculosis

Inputs	Activities	Outputs	Outcomes
• Trained staff • Health info systems • Clinics, labs, pharmacies • Effective organizations	• Identify TB cases • Identify contacts • Diagnose causes of local cases		

Context: Eroding infrastructure for public health; community mistrust of government; new diseases such as HIV/ AIDS increasing susceptibility to TB; increasing rates of incarceration creating new settings for transmitting TB; and certain strains of TB becoming drug resistant

Source: Community Tool Box: Developing a Logic Model or Theory of Change

A Tuberculosis Program Logic Model

We expect that once completed or under way, these activities will produce the following evidence of service delivery:

Mission: To improve well-being by a collaborative effort to reduce the incidence of tuberculosis

Inputs	Activities	Outputs	Outcomes
• Trained staff • Health info systems • Clinics, labs, pharmacies • Effective organizations	• Identify TB cases • Identify contacts • Diagnose causes of local cases	• Persons beginning treatment • Persons completing treatment	

Context: Eroding infrastructure for public health; community mistrust of government; new diseases such as HIV/ AIDS increasing susceptibility to TB; increasing rates of incarceration creating new settings for transmitting TB; and certain strains of TB becoming drug resistant

Source: Community Tool Box: Developing a Logic Model or Theory of Change

A Tuberculosis Program Logic Model

We expect that if completed or ongoing, these activities will lead to the following changes:

Mission: To improve well-being by a collaborative effort to reduce the incidence of tuberculosis

Inputs	**Activities**	**Outputs**	**Outcomes**
• Trained staff	• Identify TB cases	• Persons beginning treatment	• Curing affected persons
• Health info systems	• Identify contacts	• Persons completing treatment	• Reduction in TB rate
• Clinics, labs, pharmacies	• Diagnose causes of local cases		• Improvement of health status
• Effective organizations			

Context: Eroding infrastructure for public health; community mistrust of government; new diseases such as HIV/ AIDS increasing susceptibility to TB; increasing rates of incarceration creating new settings for transmitting TB; and certain strains of TB becoming drug resistant

Source: Community Tool Box: Developing a Logic Model or Theory of Change

Logic Models
Sample International Logic Models

Intended impact and theory of change	Logic model	Metrics	Tools and timing
Theory of Change (in summary form, showing programmatic activities only):	**Inputs:** Staff and resources that support program participants	Participants' income, education level, prior business growth, ~20 others	Application form, interview form (administered once before entry)
Universities will market to and select underserved women SME owners with growth potential, provide a ~180 hour practical business curriculum, and work with local NGOs to provide up to 2 years of mentors and networks to all participants, and up to 1 year of business advising and help accessing capital to top 25%	**Outputs:** Business education, support services	Attendance and graduation rate, support service usage rate and satisfaction	Attendance list (during course), survey (before and 6/18/30 months after the course)
	Intermediate outcomes: Changes in business knowledge and interpersonal skills	Ability to calculate profit, increased confidence to delegate, ~25 others	Skills assessment (before and after the course), quality of business plan
Intended Impact:	**Intermediate outcomes:** Changes in business practices	Use of formal financials, evidence of delegation, ~25 others	Survey on changes in business practices and business performance (before and 6/18/30 months after the course)
Over five years, 10,000 underserved women from Africa, Asia, and Latin America will expand their businesses and create jobs	**Ultimate outcomes:** Improved business performance	Growth in revenues, jobs created	

Program Goal: Provide underserved female entrepreneurs around the world with business and management education that helps grow local economies and bring about greater shared prosperity.

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BRAC's WASH Program Logic Model

Inputs	Strategies	Outputs	Short-Term Outcomes	Intermediate Outcomes	Long-Term Outcomes
• Imams and religious leaders • BRAC facilities for training • Educational resources for teachers • Public-private partnerships • Soap Companies • Netherlands government • National Sanitation Task Force	• Census • Village WASH Committees (VWCs) • Trainings • Loans • Technical support • Community theater • Related Hadith and Quran sermons • School Brigades/ School WASH Committees	• Access to sanitation for 17.6 million • Hygiene education for 38.8 million • Safe water for 8.5 million • Reach 150 upazilas	• Census style data collection to measure: • Changes in knowledge and skills • Leadership training of 1 woman and 1 man from each VWC • Teacher training	• Increased levels of hygiene and sanitation practices • Clean water practices more commonly used	• High participation in organized groups: • VWC • RSC (Rural Sanitaiton Centers) • School Brigades • School WASH Committees • Rural Bangladesh communities value WASH principles
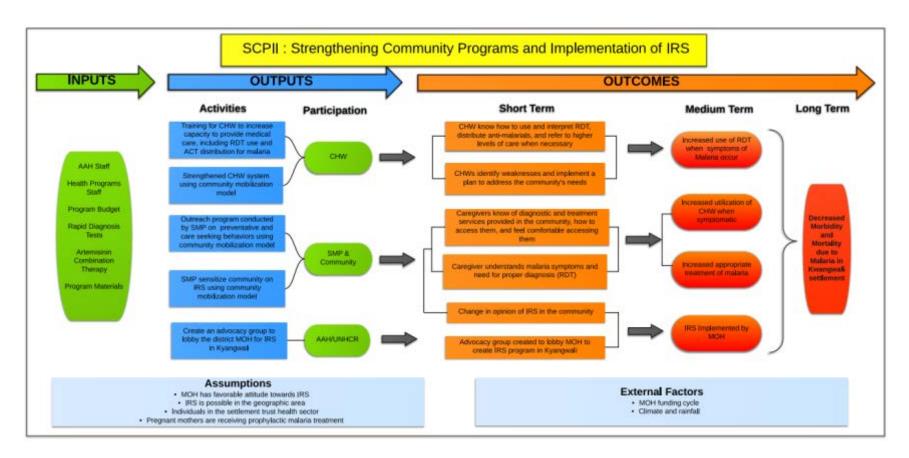
Program Goal: BRAC's Water, Sanitation, and Hygiene (WASH) program is aimed at achieving the seventh Millennium Development Goal to half the proportion of people without access to safe drinking water and basic sanitation by 2015.
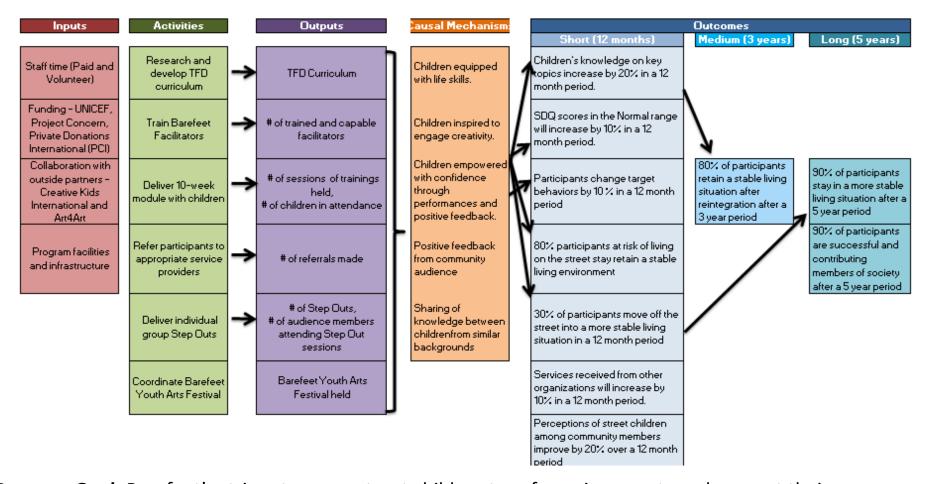
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Program Goal: The goal of the SCPII program is to reduce morbidity and mortality due to malaria in the Kwangwali settlement of Uganda.

Barefeet Logic Model

Inputs	Activities	Outputs	Causal Mechanisms	Outcomes		
				Short (12 months)	**Medium (3 years)**	**Long (5 years)**
Staff time (Paid and Volunteer)	Research and develop TFD curriculum	TFD Curriculum	Children equipped with life skills.	Children's knowledge on key topics increase by 20% in a 12 month period.		
Funding – UNICEF, Project Concern, Private Donations International (PCI)	Train Barefeet Facilitators	# of trained and capable facilitators	Children inspired to engage creativity.	SDQ scores in the Normal range will increase by 10% in a 12 month period.		
Collaboration with outside partners – Creative Kids International and Art4Art	Deliver 10-week module with children	# of sessions of trainings held, # of children in attendance	Children empowered with confidence through performances and positive feedback.	Participants change target behaviors by 10% in a 12 month period	80% of participants retain a stable living situation after reintegration after a 3 year period	90% of participants stay in a more stable living situation after a 5 year period
Program facilities and infrastructure	Refer participants to appropriate service providers	# of referrals made	Positive feedback from community audience	80% participants at risk of living on the street stay retain a stable living environment		90% of participants are successful and contributing members of society after a 5 year period
	Deliver individual group Step Outs	# of Step Outs, # of audience members attending Step Out sessions	Sharing of knowledge between children from similar backgrounds	30% of participants move off the street into a more stable living situation in a 12 month period		
	Coordinate Barefeet Youth Arts Festival	Barefeet Youth Arts Festival held		Services received from other organizations will increase by 10% in a 12 month period.		
				Perceptions of street children among community members improve by 20% over a 12 month period		

Program Goal: Barefeet's strives to move street children to safe environments and prevent their disengagement from the community in Zambia.

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Theory of Change (ToC)
Overview of Framework

Theory of Change (ToC): Overview

Theory of Change (developed in 1990s)

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┌─────────────────────┐
│  Long-term Outcome  │
│      (Vision)       │
└─────────────────────┘
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Pre-condition — Pre-condition — Pre-condition

Pre-condition — Pre-condition — Pre-condition

Pre-condition

Pathway to Change

What Is ToC?:
- A roadmap that plots the desired change and what needs to happen to get there
- An outcome-based, causal model (if-> then statements)
- Not a standardized model and various types exist
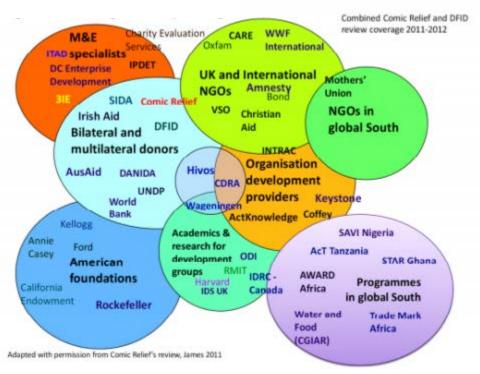
Uses of ToC:
- Strategic Planning -Map change processes and outcomes
- Monitoring and evaluation - Articulate expected outcomes
- Description - Communicate their program externally
- Learning - Use as a thinking tool to develop theories

Source: Act Knowledge: Project Superwomen, Guided Example of Theory of Change

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Theory of Change (ToC): Overview

Various Agencies Using ToC

Graphic Source: Vogel, I.

International Use:
- Use of ToC has increased among international NGOs, government, bilateral and multilaterals agencies.
- ToC is being used as a system-thinking tool, incorporating the activities of various players within a certain country.
- Development agencies and organizations are mainly using ToC for evaluation purposes, but increasing its use for program design and implementation.

Logic Models vs. Theory of Change

Logic Models	Theory of Change
• Graphically summarizes the program's outcomes, inputs, and activities	• Links outcomes and activities to explain why the desired change is expected
• Starts with what the organization's activities are and leads to outcomes	• Starts with outcomes and identifies causal factors and processes
• Tends to be relatively simplified	• Tends to be complex and many types of models exist
• Is useful for illustrating a summary of the program	• Is useful for rigorous planning and evaluation
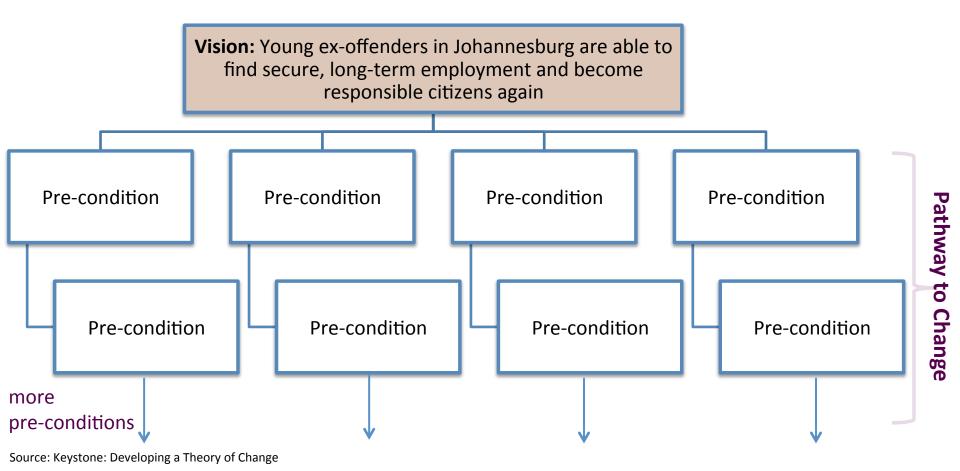
Theory of Change (ToC)
case example:
Khanya Youth Training Project

Khanya Youth Training Project ToC

Providing job training for ex-offenders in South Africa

What is the long-term social change we want to help bring about?
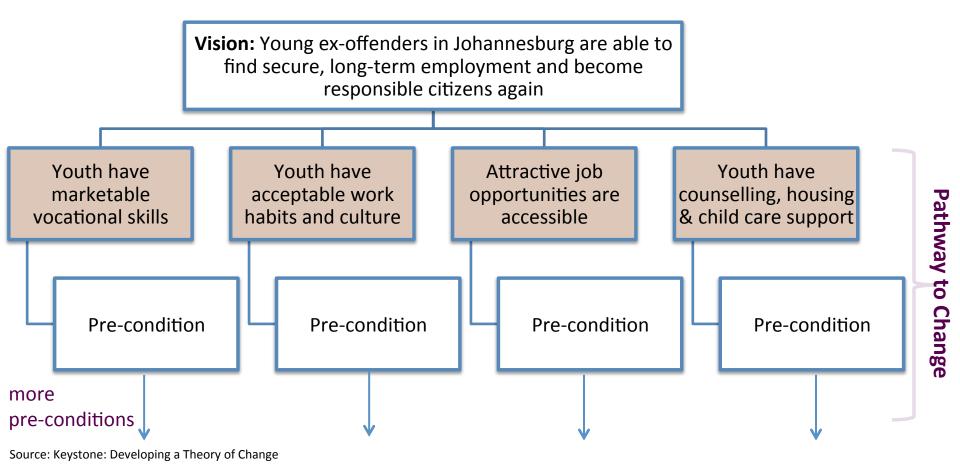
Vision: Young ex-offenders in Johannesburg are able to find secure, long-term employment and become responsible citizens again

| Pre-condition | Pre-condition | Pre-condition | Pre-condition |

| Pre-condition | Pre-condition | Pre-condition | Pre-condition |

Pathway to Change

more pre-conditions

Khanya Youth Training Project ToC

Providing job training for ex-offenders in South Africa

What needs to happen for this change (or vision of success) to come about?
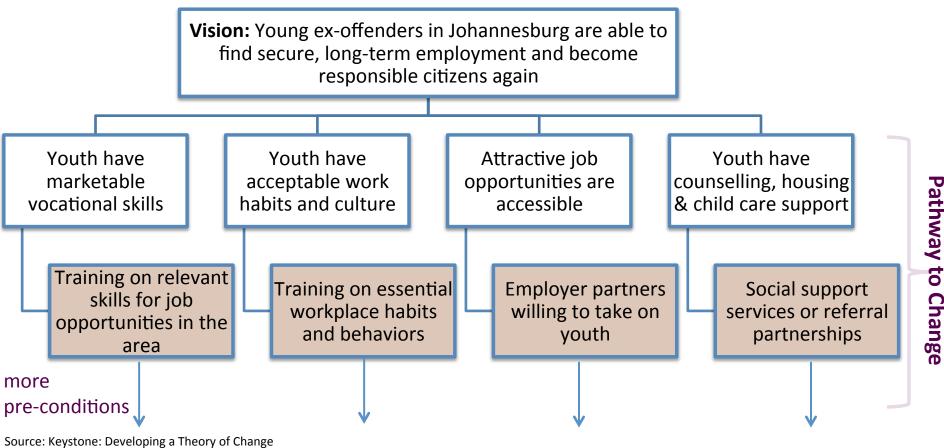
Vision: Young ex-offenders in Johannesburg are able to find secure, long-term employment and become responsible citizens again

Youth have marketable vocational skills	Youth have acceptable work habits and culture	Attractive job opportunities are accessible	Youth have counselling, housing & child care support
Pre-condition	Pre-condition	Pre-condition	Pre-condition

Pathway to Change

more pre-conditions

Source: Keystone: Developing a Theory of Change

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Providing job training for ex-offenders in South Africa

What needs to happen in order to achieve the pre-conditions?

Vision: Young ex-offenders in Johannesburg are able to find secure, long-term employment and become responsible citizens again

Youth have marketable vocational skills	Youth have acceptable work habits and culture	Attractive job opportunities are accessible	Youth have counselling, housing & child care support
Training on relevant skills for job opportunities in the area	Training on essential workplace habits and behaviors	Employer partners willing to take on youth	Social support services or referral partnerships

Pathway to Change

more pre-conditions

Source: Keystone: Developing a Theory of Change

Theory of Change (ToC)
Sample International ToCs

Oxfam Raising Her Voice ToC
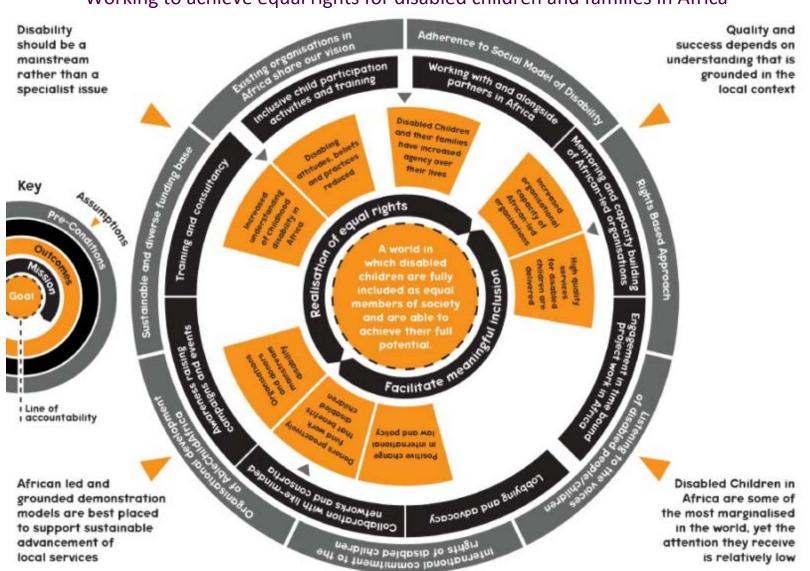
Promoting the rights of poor women to engage in governance systems
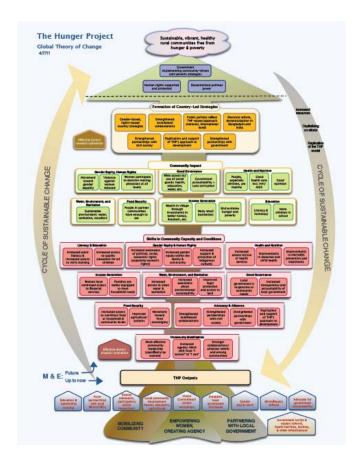
Working to achieve equal rights for disabled children and families in Africa

The Hunger Project ToC

Empowering women and men to end their own hunger

Refer to Full Diagram for Details

Vision
- Sustainable, vibrant, healthy rural communities free from hunger & poverty

Pre-conditions (Primary)
- Government implementing community-driven anti-poverty strategies
- Human rights supported and protected
- Decentralized political power
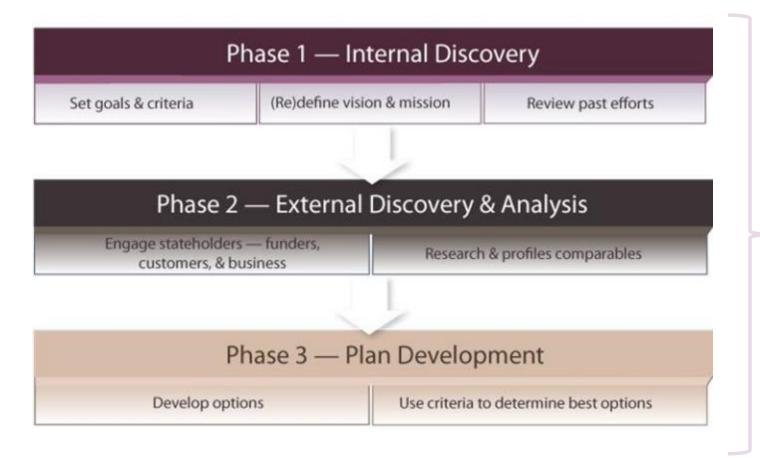
Pre-conditions (Secondary)/ Strategies
- Formation of Country-Led Strategies
- Community Impact
- Shifts in Community Capacity and Conditions

Strategic Plans
Overview

Phase 1 — Internal Discovery

| Set goals & criteria | (Re)define vision & mission | Review past efforts |

Phase 2 — External Discovery & Analysis

| Engage stakeholders — funders, customers, & business | Research & profiles comparables |

Phase 3 — Plan Development

| Develop options | Use criteria to determine best options |

Grounded in the **Theory of Change/ Logic Models**

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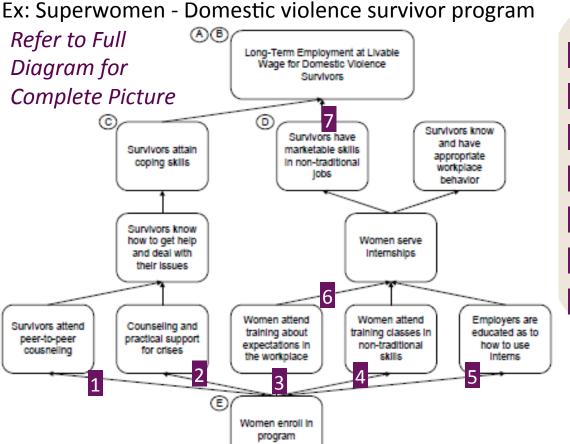
Key Qualities of a Basic Strategic Plan

- Serves as a unifying document or a **compass** for the organization with a 3-5 year horizon

- Defines a **future vision** encumbered by past or **current realities**, stretching the organization to transform itself over time

- Contains a compelling vision, well-articulated mission, and clearly stated **strategies** and **objectives**

- Identifies **actionable steps** to achieve the objectives

Strategic Plan Components

- **Organizational Assessment:** An objective determination of internal & external factors that impact the organization
- **Vision:** A description of the desired future, ideal state
- **Mission:** A brief description of the organization's purpose. Why do we exist? What do we really do?
- **Values:** The principles on which an organization is built
- **Strategies and Goals:** Broad areas of activity such as 1) Services, 2) Facilities, 3) Public relations, 4) Staff Development, 5) Board Development, 6) Fundraising
- **Objectives:** Series of time-limited, measurable activities that roll up to the goal areas (include measurable outcomes)
- **Action Steps/ Implementation Plan:** Day to day activities necessary to achieve specific objectives

How ToC is linked to Strategic Planning

Ex: Superwomen - Domestic violence survivor program

Refer to Full Diagram for Complete Picture

Intervention Points

1. Group sessions
2. Counseling & crises support (housing evictions or courts)
3. Job readiness classes
4. Training & experiential learning in electrical, plumbing, bldg maintenance
5. Partnership with potential employers
6. Placement for internships
7. Placement for full-time jobs

Informs **Strategies, Goals,** and **Objectives**
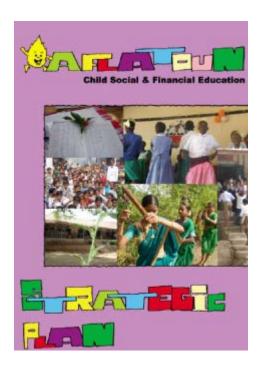
Note: Logic Models capture inputs, activities, and outcomes so they link directly to Strategies, Goals and Objectives of the strategic plan.

Source: Act Knowledge: Project Superwomen, Guided Example of Theory of Change

Strategic Plans
case example:
Aflatoun

Aflatoun provides low-income children with social and finance education program

Refer to Plan for Details

Scenario:

In 2006, Aflatoun's education programs were in **10 countries**. By 2010, they aimed to reach **75 countries** (1 million children) through a network of affiliates.

Vision 2010

Three Pillars

Concept: Become a thought leader in Child Social Financial Education

Program: 75 countries, 1 million children by 2010

Network: Build a movement with 400 partners

Strategic Plan Highlight: Aflatoun ('08 – '10)

Vision 2010
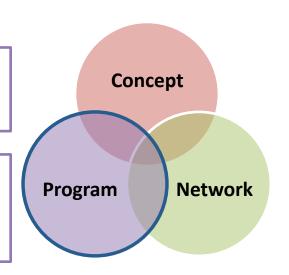
- Implement quality Aflatoun programs in 75 countries, reaching one million children by 2010.

Strategy

- Facilitate and support the quality implementation of Aflatoun programs by developing a relationship with partners and providing technical assistance and services.

Objectives

- Increase number of countries with implementing partners
- Contextualize and refine program materials
- Implement quality assurance system
- Refining of the training methodology
- Facilitate cooperation between implementing partners and other stakeholders

Concept

Program   Network
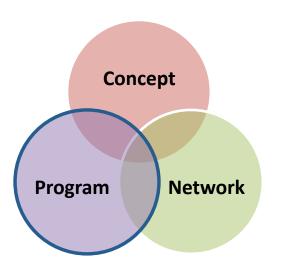
- Example for Program Pillar - Plan highlights similar info for two other pillars.

Objective measures and timeline included in the plan

Strategic Objectives Implementation Plan (Program Pillar)

Programme initiatives	2008	Deliverable	2009	Deliverable	2010	Deliverable
Increase number of implementing partners • Increase # of countries with implementing partners	• Research, screen and contact potential partners • Regional meetings • Sign partnership • Assist with implementation	• 150 countries • 100 countr. • 75 countr. • 20 countr. • 2000 Afla-toun clubs	• Continued	• All countries • 39 countr. • 29 countr. • 22 countr. • 4000 clubs • 500 micro-enterprises	• Continued	• 39 countr. • 29 countr. • 22 countr. • 4000 clubs • 500 micro-enterprises
• Increase number of partners in non-formal education	• As above	• 3 pilots	• Continued	• 5 pilots	• Continued	• 10 pilots
Refine programme material • Contextualise workbooks to different regions	• Contextualization workshop • Adapt workbooks	• French • SE Asia • 6 new regions				
• Refine training material	• Partner feedback on manual • Secretariat adjusts manual	• Revised training and games manual • Contextua-lized guidebooks	• Partner feedback on contextualisation • Revise contextuali-sation guidebook	Revised contextuali-sation guidebook	• Revise Partner Manual based on partner feedback	Revised/con-textualised Partner Manual
Implement quality assurance system	• Develop partner questionnaire • Send and collect and synthesise questionnaires	• QA report • Tailored support to partners	• Develop partner questionnaire • Send and collect and synthesise questionnaires	• QA report • Tailored support to partners	• Develop partner questionnaire • Send and collect and synthesise questionnaires	• QA report • Tailored support to partners
Evaluate and improve training methodology	• Collect feedback from partners and consult experts	• Refined training method	• Continued	Refined training method	• Continued	Refined training method
Facilitate cooperation between partners and other stakeholders	• Facilitate scale up by partner cooperation and involvement of the government and Financial Institutions • Set-up children participation task force (CPTF) • Twinning between partners	• Multiple partners in • 25% countr. • 30% FI involved • 8 countries scaled up • CPTF established • 5 twinning events	• Continued • Hold CPTF meeting	• 30% countr. >1 partners • 35% FI inv. • 17 countr. scaled up • 10 twinning events • CP innovated and adjusted	• Continued	CSFE in curriculum • 10% local • 2% national • 40% countr. >1 partners • 40% FI inv. • 21 countr. scaled up • 15 twinning events • Int. children's

Concept

Program   **Network**

- Example for Program Pillar - Plan highlights similar info for two other pillars.

Strategic Plans
Sample International Strategic Plans

Strategic Plan 2013 - 2016

Registered UK Charity no. 326859   www.ablechildafrica.org

AbleChildAfrica
Working with disabled children and young people in Africa

Able Child Africa advocates for equal rights for disabled children in Africa

Refer to Plan for Details

How we did: what we have accomplished from our last strategy

| Strategic Objectives 2007-2012	Effect change in policy and practice so that the rights of young disabled people are mainstreamed across Africa, nationally and locally.	Support African led models for ensuring that young disabled people are included in the development of their communities.	Develop AbleChildAfrica so that it can effectively support and initiate activities to achieve its mission.	Develop child-focused policies and systems which enable both us and partners to ensure full participation, accountability and child safety.
The Plan	➢ Collect information & resources about childhood disability. ➢ Support our partners to carry out rights based advocacy work. ➢ Build the capacity of disabled youth to advocate for their rights. ➢ Work to persuade and support mainstream development agencies to include young disabled people.	➢ Develop 4 new partnerships with African-led organisations addressing childhood disability. ➢ Continue to support Uganda Society for Disabled Children. ➢ Build the capacity of all partners. ➢ Provide financial support to partners & monitor its impact. ➢ Provide learning & networking opportunities for partners.	➢ Launch AbleChildAfrica. ➢ Diversify our funding base. ➢ Grow income to £1.8m by 2012. ➢ Build the capacity of our Board. ➢ Provide an information signposting service & opportunities for shared learning across African led organisations.	➢ Ensure our work is directly informed and monitored by young disabled people. ➢ Develop systems to monitor the impact of our work. ➢ Transparently report on the use and impact of donated funds. ➢ Create a child protection policy.
What We Did	Our programmatic work over the previous strategic period focused on developing meaningful partnerships with African led organisations and working alongside them to improve the lives of disabled children in their local communities. Where partners held advocacy as a key priority, we joined with them to hold local Governments to account to their stated commitments. We also began participating in like-minded networks and consortia to leverage our collective power and advocate for change in international policy and legislation.	We are proud to have established 4 new partnerships, while simultaneously maintaining USDC as a long standing and valued partner. We have leveraged direct financial support and held networking meetings in 2008 & 2010. We also provided bespoke mentoring to significantly improve the capacity of each of our partners. In particular, we supported the development of their strategies, organisational policies & procedures, sustainable fundraising, financial management, good governance procedures and M&E systems.	Unfortunately, the launch of ACA in 2007 coincided with the global economic downturn, which slowed growth over the last strategic period. Despite this, we have developed and sustained new partnerships and have increased our income, albeit not to the level originally intended. We have diversified our funding by building relationships with new donors and by establishing Friends of AbleChildAfrica. We are proud of our Board development, in particular the wide range of skills and expertise represented and the active engagement of Trustees across all areas.	We developed a robust child protection policy in 2007 & updated this policy again in 2012. We also require rigorous child protection controls as a condition of partnership with AbleChildAfrica. We developed and implemented all necessary organisational policies, procedures and controls and are particularly proud of our risk management systems, including the proactive development of an Anti-Bribery Policy. We developed and utilised M&E systems to monitor the use and impact of funds. Our annual accounts and regular updates on our work are made available on our website.
Going Forward	➢ We plan to: ➢ Continue collaborating with like-minded organisations & networks. ➢ Further develop our advocacy work as a strategic priority (see obj. 3). ➢ Influence key organisations to mainstream disability in their own work streams. ➢ Continuing building the capacity of disabled children and their families to act as agents of change in their own lives and communities.	➢ We plan to: ➢ Continue working with and through our existing partners, long term. ➢ Deliver time bound projects. ➢ Continue building the capacity of African led organisations. ➢ Further develop and improve our partnership model. ➢ As resources allow, develop 1-2 additional partnerships. ➢ Diversify our ways of working to have a wider impact across Africa.	➢ We plan to: ➢ Further diversify sources of funding. ➢ Increase public fundraising through new corporate partnerships & growth of Friends of AbleChildAfrica. ➢ Strengthen existing relationships with loyal supporters ➢ Develop relationships with new grant making donors. ➢ Maintain a strong and dynamic Board.	➢ We plan to: ➢ Further develop our child participation work as a strategic priority (see obj. 2). ➢ Create a youth advisory panel. ➢ Retain the high priority on safeguarding children in all we do. ➢ As part of the current strategic review we have developed a Theory of Change & further improved our M&E framework, both will be utilised over the next strategic period.
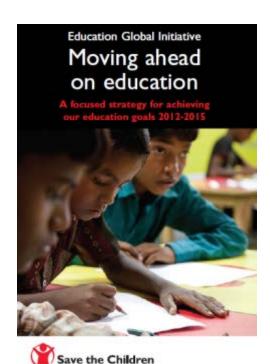
Describes the original plan, what they did, and plan going forward for the four strategic objectives from the previous five year period.

Education Global Initiative
Moving ahead on education
A focused strategy for achieving our education goals 2012-2015

Save the Children

Risk	Risk level	Impact	Risk mitigation strategy
Decline in donor funds prevents Save the Children from continuing to expand its education programmes	Medium	High	Continue to mobilise resources from a variety of public and private donors. Use evidence from successful programmes to make the case for funding for Save the Children education programmes across all members
Increase in natural disasters and emergencies has a negative impact on our education programmes	Medium	High	Ensure that Save the Children is prepared to support education in emergency situations as part of our dual mandate role
Inadequate technical capacity to support high-quality education programmes	Medium	Medium	Strengthen the professional network across all Save the Children members. Ensure the quality of senior level professional appointments
Increase in conflict and/or decline in quality of governments has a negative impact on children's learning	Medium	Medium	Build the capacity of civil society organisations and other partners to support education in conflict situations. Advocate for governments to give priority attention to the provision of good quality education
Governments and other stakeholders fail to give adequate attention to the importance of ECCD	Low	Medium	Continue to advocate for the importance of support for ECCD. Develop evidence on innovative interventions that work for ECCD
Governments and other stakeholders fail to give adequate attention to the importance of improving the quality of education	Low	Medium	Continue to advocate for measures to improve the quality of learning environments. Develop evidence on the impact of improving learning outcomes
Decline in member engagement and support for education	Low	High	Continue to build members' ownership of, and support for, the Education Global Initiative
Competition between Save the Children global initiatives for scarce resources	Low	Medium	Actively seek opportunities for collaboration across the global initiatives and emphasise the inter-sectoral nature of our interventions

Identifies potential risks that may prevent the organization from achieving the strategic objectives, along with the mitigation strategies .
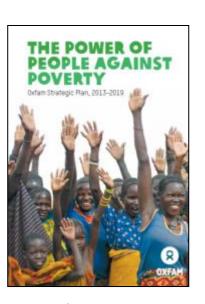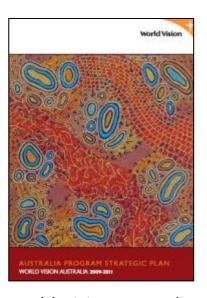
Refer to Plan for Details

CYF International Plan
2013-2016

Oxfam Plan
2013-2019

Red Cross Australia
xxxx-2015

World Vision Australia
2009-2011

Less rigorous analysis, more brochure-like plans

All plan examples demonstrate most of the key qualities of a basic strategic plan (refer to previous slide for these qualities). Some are stronger in certain sections than others.

Sources

Sources Cited

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