

Introduction

1	Core principles	09
2	How to use the Toolkit	10
3	What is included in each tool	12
4	When to use the Toolkit	13
5	Who should get involved	14

Stage 1

Getting the direction right

Introduction	18
1 Stakeholder analysis	19
1.1 Tool	19
1.2 Case study	20
1.3 Worksheet	22
1.4 Planning form	23
2 Engaging service users	24
2.1 Good practice guide	24
2.2 Case study	25
2.3 Worksheet	26
2.4 Planning form	27
3 Mission, vision and values	28
3.1 Tool	28
3.2 Case study	29
3.3 Worksheet	30
3.4 Planning form	31

Stage 2

Environmental analysis

Introduction	34
1 SWOT	35
1.1 Tool	35
1.2 Case study	36
1.3 Worksheet	37
1.4 Planning form	38
2 Internal healthcheck	39
2.1 Tool	39
2.2 Case study	40
2.3 Worksheet	41
2.4 Planning form	42
3 PEST	43
3.1 Tool	43
3.2 Case study	44
3.3 Worksheet	46
3.4 Planning form	47
4 Portfolio analysis	48
4.1 Tool	48
4.2 Illustration	49
4.3 Worksheet	51
4.4 Planning form	52
5 Other player analysis	53
5.1 Tool	53
5.2 Case study	54
5.3 Worksheet	56
5.4 Planning form	57
6 Strategic Group mapping	58
6.1 Tool	58
6.2 Illustration	59
6.3 Worksheet	60
6.4 Planning form	61
7 Risk analysis	62
7.1 Tool	62
7.2 Illustration	63
7.3 Worksheet	64
7.4 Planning form	65

Stage 3

Options and choice

Introduction	68
1 Ansoff Matrix	69
1.1 Tool	69
1.2 Illustration	70
1.3 Worksheet	71
1.4 Planning form	72
2 Strategic options	73
2.1 Tool	73
2.2 Case study	74
2.3 Worksheet	76
2.4 Planning form	77
3 Other player options	78
3.1 Tool	78
3.2 Illustration	79
3.3 Worksheet	80
3.4 Planning form	81
4 Force field analysis	82
4.1 Tool	82
4.2 Illustration	83
4.3 Worksheet	84
4.4 Planning form	85
5 Cost-benefit analysis	86
5.1 Tool	86
5.2 Illustration	87
5.3 Worksheet	88
5.4 Planning form	89
6 Break-even analysis	90
6.1 Tool	90
6.2 Illustration	91
6.3 Worksheet	93
6.4 Planning form	94

The Toolkit is divided up into an introductory section, sections containing all the tools and good practice guides, plus a closing section where we signpost you to other resources and ask for your feedback.

Stage 4

Planning

Introduction	98
1 Goal and target setting	97
1.1 Good practice guide	97
1.2 Case study	98
1.3 Worksheet	99
1.4 Planning form	100
2 Writing a strategic plan	101
2.1 Good practice guide	101
2.2 Case study	102
2.3 Worksheet	104
2.4 Planning form	105
3 Budgeting	106
3.1 Good practice guide	106
3.2 Case study	108
3.3 Worksheet	109
3.4 Planning form	110

Stage 5

Implementation

Introduction	112
1 Change management	113
1.1 Good practice guide	113
1.2 Case study	114
1.3 Worksheet	116
1.4 Planning form	117
2 Performance management	118
2.1 Good practice guide	118
2.2 Case study	119
2.3 Worksheet	121
2.4 Planning form	122
3 Project management	123
3.1 Good practice guide	123
3.2 Case study	125
3.3 Worksheet	127
3.4 Planning form	128

Stage 6

Evaluation

Introduction	130
1 Assessment and reporting	131
1.1 Good practice guide	131
1.2 Case study	132
1.3 Worksheet	134
1.4 Planning form	135
2 Outcome assessment	136
2.1 Good practice guide	136
2.2 Illustration	137
2.3 Worksheet	139
2.4 Planning form	140

Resources

1 Communication and involvement tools	143
2 Index of contributors	147
3 Signpost to other resources	150
4 Further support	158
5 Toolkit feedback	160
6 NCVO Third Sector Foresight Network	160