**How to create a planning triangle**

**1 Write your overall aim**

Start at the top of the triangle, with your overall aim.

Your overall aim should:

* identify your target group – who you want to create change for in the longer term. This might be different to the group you work with. For instance, if you support parents to improve parenting skills, the target group for your overall aim will be their children.
* say where your target group is based – do you want to see change in a city or region, across the country, or internationally?
* identify the change you want to see happen for your target group. Think about a long term problem or issue that your target group faces – then turn this negative statement into a positive statement of change (your overall aim).

Your overall aim **should not:**

* describe the work you are doing. Make sure you are describing changes by using words like ‘increase’, ‘improve’, ‘more’, ‘better’, or ‘reduce’. You can use ‘maintain’ or ‘prevent’ if a situation would get worse without your intervention.
* use woolly language, e.g.‘empower’ or ‘access’. Instead, think about what you are empowering people to do, or why their ability to access something is important. For example, a group might be working with young people on a local estate to increase access to positive activities, because without anything positive to do young people become involved in antisocial behaviour. Instead of ‘to increase local young people’s access to positive activities’, their overall aim would be better written as ‘to reduce antisocial behaviour on the local estate’.

Example overall aims include:

* to improve the quality of life for older people living with macular degeneration in England
* to maintain biodiversity in Northumberland
* to reduce child poverty in England.

**2 Write your specific aims**

Your specific aims are short to medium-term changes you hope to bring about as a result of your work. They have to be achieved to support progress towards your overall aim.

To help define your specific aims, it can be helpful to think about the barriers that stand in the way of your overall aim being achieved. For example, if your overall aim is to increase sustainable living among local communities in Devon:

|  |  |
| --- | --- |
| **barriers might include** | **‘flip’ the barriers into statements of positive change to become your specific aims, such as** |
| the local government does not invest enough in sustainable transport options | to increase local government investment in sustainable transport options |
| sustainability initiatives are being carried out by individuals, but not by communities | to increase the number of community sustainability initiatives |
| local people do not understand how to live more sustainably | to improve the awareness of local people around sustainable living |

Your specific aims should:

* articulate changes, using phrases such as ‘to increase’, ‘to improve or ‘to reduce’
* describe who experiences the change
* be expressed clearly and concisely – could someone who doesn’t work for your organisation understand them?

Your specific aims should not:

* describe the work you will deliver
* be too numerous – include between three and five specific aims as a rough guide.

**3 Write your objectives**

Your objectives are things that you will do to achieve your specific aims. Consider what types of activity are most likely to help you achieve them. For example, if your specific aim was ‘to improve the skills and work experience of ex-offenders’, an objective might be ‘to provide one-to-one support around writing CVs and job searches’.

Your objectives should:

* describe what you do, using phrases that focus on delivery instead of on change – for example, you might use ‘to provide’, ‘to run’, ‘to offer’ or ‘to organise’
* link to at least one of your specific aims – it can be useful to draw lines on your triangle to show which objective(s) link to which specific aim(s). You may have one or more objectives supporting each specific aim, and objectives might support multiple specific aims.

Your objectives **should not:**

* be too numerous – aim for a maximum of six objectives to keep your triangle easy to read and understand. You can describe broad areas of work rather than outlining all the specific things you do.

Articulating your objectives may lead you to think about internal processes that need to be in place so you can deliver your work (for example, fundraising, staff training, recruitment or marketing). The triangle is focused on outward-facing work that you provide in order to achieve your specific aims, so it doesn’t include these internal processes.

**4 Check your triangle tells a clear and realistic story**

Your triangle should present a clear narrative of how your organisation makes a difference in the short to medium term, and the longer term.

Check that it is:

* logical: there should be logical links between the three sections of your triangle. Consider whether someone outside your organisation would be able to follow the story of how your work will create change.
* realistic and achievable: to the best of your knowledge (from your research or previous experience), will achieving your specific aims contribute to your overall aim? Will delivering your objectives achieve your specific aims? If you have an objective that doesn’t link to a specific aim, perhaps it is not strictly necessary or you are missing a specific aim? If you have a specific aim that doesn’t have any objectives linked to it, are there other types of work you need to consider delivering?
* clear: your completed triangle should be useful for describing the value of your work both internally and to the outside world. Make sure that it is free from jargon and acronyms.

**5 Review your triangle with others**

Once you have created your triangle, review it to see where it could be improved. Try to do this with others to get different perspectives and to strengthen the story it tells. You could involve colleagues, managers, trustees, beneficiaries or partners, for example. Check that the story the triangle tells is recognisable based on their experiences.

**6 Use your triangle**

Now you’ve created your triangle, don’t forget to use it. A triangle can help you to communicate succinctly about your work and the change it makes, and to plan your project or feed into your organisation’s strategy.

If you want to go on to evaluate your work, you can use your triangle to help you develop a monitoring framework.

Adapted from https://knowhow.ncvo.org.uk/how-to/copy\_of\_how-to-create-a-planning-triangle