

Note: This Planning Matrix is an optional tool that some may find helpful for general work or one project. It is based on an amalgam of resources that have helped some advocates, organizers, and civic engagement champions advance just systemic change in the past.

Planning Matrix

Problem or Opportunity Statement – One sentence or phrase summarizing systemic root causes of problems or opportunities.

Mission or Purpose Statement – One sentence or phrase summarizing the pursuit of just systemic change.

Vision Statement – One sentence or phrase summarizing the just systemic reality once the mission or purpose is achieved.

Justice & Equity Commitment (Explicitly including Racial Justice & Equity) – Overview of how the work will reflect justice and equity, in values, outcomes, processes, and ongoing reflections and adjustments.

Outcomes – Broad goals that, if achieved, will address the root causes of the problem or opportunity, advance the mission or purpose, help realize the vision, and model justice and equity.

Objectives – Specific sub-goals for each outcome that must be measurable. Each may include:

- **Strategies** – Plans of action and communication for objectives.
- **Timelines** – Set period of time to reach objectives.
- **Inputs & Internal Considerations** – Assets, limits, and capital (human, financial, knowledge, skills, networks, etc.) that impact objectives.
- **Outputs & External Actions** – Activities and tactics to advance objectives.
- **Targets & Decision-Makers** – Those who have the power to advance or prevent objectives.
- **Stakeholders, Allies, Proponents, Opponents, Opportunities, Obstacles, & Context** – People, groups, and circumstances that help define objectives, shape outputs and external actions, and influence targets and decision-makers.
- **Evaluation & Measurement Processes** – Quantitative and/or qualitative methods to track progress or setbacks, decide if or how to continue or adjust, and learn if or how objectives are coming to fruition.