Working your Strategic Plan: Implementing and Monitoring Your Plan
Jeanne Allen

A Process

Strengthen

Decisions

Results

Adjustments

1 thing I already know about implementing or monitoring strategic planning

1 question that I have re: implementing or monitoring strategic planning
Takeaways
1. Discuss converting strategic plan to the operational
2. Identify board role
3. Define a monitoring process
4. Explore leadership & management

Already completed:
1. Reviewed Mission- Vision- Values
2. SWOT- Gathered data
3. Board Involvement
4. Selected 3-5 Priorities
5. Identified 2-3 Strategies/Priority
6. Written a plan
7. Board voted approve
Planning Process

1. Prepare
2. Position
3. Produce
4. Perform
5. Prove

Board Roles

1. Set STRATEGIC direction
2. OWN Planning process
3. APPROVE goals/objective
4. MONITOR execution

CEO/ED Roles

1. Prepare board & staff
2. Create operation plan
3. Evaluate
4. Regular reports to board

Key Questions... 

- What does the community want?
- What do we believe?
- Where do we want to go & how do we get there?
Mission:
To end hunger through community partnerships.

Values: Guiding our work every day
• We are all in this together
• We deliver.
• We innovate.
• We lead with our hearts.
• We believe our differences make us stronger.

Mission:
Improve the welfare of dogs living continuously chained outdoors by providing free spay/neuter, vaccinations, and fences, while bolstering connections between these dogs and their human companions through non-judgmental assistance and sharing of information designed to raise general community expectations regarding the standards of care for pets living there.

Mission:
Improve the welfare of dogs living in under-served communities as well as dogs continuously chained outdoors.

Animals are a reminder that we are all more alike than we are different and provide a unique opportunity to connect with and understand each other. If you care about animals, you must also care about people and the impact poverty and prejudice has on both.

https://beyondfences.org/
Beyond Fences knows what pets mean to all people and we don’t want a system that only cares about & serves those wealthy & privileged. Support our effort to increase access to pet wellness resources for everyone in our community.
Perform = Implementation

- Set goals
- Develop action plans
- Create buy in
- Measure results
- Make changes

Advice from nonprofit leaders

1. "It’s important to provide a consistent & positive message about why the new strategy is the best course of action."

2. "Having a strategic plan... is what enables you to stay the course, even in times of change."

3. "We must be willing to adjust the plan as needed. We change our tactics, but let the goals stand."

Planning Terminology

Mission
Goals
Strategies
Objective
Annual Plan

Year 1 2-3 3-5 “Forever”
Goal: Provide high quality programs of comfort & support for seriously ill children and their families

<table>
<thead>
<tr>
<th>Action</th>
<th>Responsibility</th>
<th>Deadline</th>
<th>Resources To Complete</th>
<th>Potential Challenge</th>
<th>Result</th>
</tr>
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Strategic Plan 2017-2020

GOALS

1. Provide high quality programs of comfort & support for seriously ill children and their families
2. Develop a leadership culture that yields a highly effective governing board.
3. To be a charity of choice.

Action Planning Questions

1. What projects do we need to carry out to achieve the goals?
2. What daily task do we continue, skip in order to function?
3. Who (dept or individual) is responsible?
4. Is the task aligned with mission or with the strategy?
Strategic Plan 2017-2020

**GOAL 1:** Provide high quality programs of comfort & support for seriously ill children and their families

**Objectives**
1. Provide exceptional programs and facilities
2. Provide a volunteer experience that inspires long-term opportunities.
3. Ensure long-term financial resources required to carry out our mission.
4. Diligently assess the need for expanded/new programs/facilities or services.
Strategic Plan 2017-2020

GOALS

1. Provide high quality programs of comfort & support for seriously ill children and their families

Objectives

3. Ensure long-term financial resources required to carry out our mission.

1. Reinstitute the Investment Committee to provide guidance and oversight.
   - Dir, Fin Q2

2. Expand promotion of NPO planned giving program
   - Sr. Dev Dir, Com Q3

3. Develop a cash mgmt analysis to better understand cash flow
   - Sr. Dev Dir, Com Q1-Q2
Strategic Plan 2017-2020

GOALS

1. Provide high quality programs of comfort & support for seriously ill children and their families
2. Develop a leadership culture that yields a highly effective governing board.
3. To be a charity of choice.

Outreach and Influence

Be an effective leader in identifying and meeting essential community needs for resources to care for our animals and people.

Programs and Services

In collaboration with others, expand our service offerings to ensure pets can remain in loving homes, while also striving for excellence in sheltering and animal protection services.

Organizational Capacity

Enhance staff, volunteer, board and financial resources as needed to achieve our goals and to support the growth of the organization.

Pair Share
1. Are we on/off track in terms of our implementation timeline?
2. If off-track, why?
3. What, if any, changes have occurred internally/externally that impact strategy execution?

**Action Planning Questions**
1. What projects do we need to carry out to achieve the goals?
2. What daily task do we continue, skip in order to function?
3. Who (dept or individual) is responsible?
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**Monitoring Plan**

**Monthly**
- Determine if actions are accomplished
- Report on % of task completed

**Are we doing**
- what we said we’d be doing?

**Quarterly**
- Review status of strategies
- Determine if adjustments needed

**Are we achieving the results that we said we’d achieve?**

**Annually**
- Assessment of annual performance
- Grade objectives based on NP performance

**What changes should we make to the plan?**
Dashboards: What to measure?

Key Performance Indicators

1. Meaningful to YOUR organization
2. Based on Strategic plan
3. Consistent basis year to year
4. Useful for setting targets

Sample Dashboard Indicators

<table>
<thead>
<tr>
<th>Fund Development</th>
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<tbody>
<tr>
<td>Months cash on hand</td>
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<tr>
<td>Board Giving</td>
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<tr>
<td>Funding Diversity: % Individual</td>
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<td>New major donors</td>
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Leadership and Management

Leadership:
- inspire, motivate & ask hard questions
- accountability

Management:
- systems & role clarity

Strategic Plan as tool of Leadership and Management
- What did we learn?
- What insights can we use next time around?

Keys to Successful Strategic Planning

1. Leadership
2. Planning committee
3. Role clarity
4. SWOT
5. Inclusive
6. Priorities
7. Change
8. Patience

What is one takeaway you have from today?