ASP NONPROFIT CENTER FOR EXCELLENCE

FIRST MONDAYS DISCUSSION

TOPIC: The Intersection of Strategic Plan Assessment and Quality Improvement

DATE: MONDAY, DECEMBER 5, 2016
First Mondays December 5, 2016
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Please click here to access the recorded discussion.

Discussion Background:

Organizations create strategic plans to define their future direction. Their commitment to implementation of plan tactics keeps them focused and on track. These are important, but it is the third step, regularly assessing and discussing plan progress and making improvements as needed, that ensure the relevance and quality of their programs. The First Mondays discussion in December will focus on the intersection of plan assessment and quality improvement and how organizations weave these ideas into their operations.

Discussion Questions:

- How does your organization conduct strategic plan assessment? (Frequency, process including who is involved, etc.)

Calendar assessment process; quarterly or twice a year; include dates for completion of plan assessment, internal review and distribution of assessment reports/scorecards; engage staff and board committees; report to full board

Data from ASP research on NP strategic planning suggests that the more successful organizations do assessment and reporting quarterly

Suggest more frequent informal assessment of one-year action plans; review monthly; share results using Stop lights; balanced scorecards, WePlanWell system scorecards. Noted that assessment and reporting on high level outcomes can be challenging to get a read on more frequently than quarterly—3 months frequently not enough time to “move the needle.”

Encourage boards to have a strategic discussion at every board meeting; could be plan assessment could be higher level review of what is happening in the environment; consultants can provide questions to help “nudge” this discussion.

- How do you report results of plan assessment? (Who sees it, how often?)

Divide & Conquer approach: divide pieces of the plan out to different board committees and key staff (Program/Services; Marketing/Communications; Fundraising/Finance) those committees in collaboration with staff do deeper dive assessment and bring highlights of assessment to the full board. This approach engages committees at deeper level in the mission of the organization.

Important for board members to be involved in committees to truly understand how well org is operating; clarity about what org is measuring and why; allows board to engage with staff in addition to the ED—builds relationships, takes pressure off ED; assessment drives agenda for board meetings

Org’s process of assessment and the measures being used to track progress should be part of the board orientation.
• How does plan assessment tie into organization-wide quality improvement efforts?

QI should be presented as the drive for continuous improvement; during assessment, especially for volunteer driven organizations, it’s important to recognize what went well with an effort, not simply what needs to be done better. This builds culture of quality improvement.

Once people have worked out how they’re going to handle assessment, it’s helpful to codify a specific policy and procedure for guiding plan assessment, reporting and making plan changes. Can specifically include this QI policies/process into this.

Can build specific quality assessment goals into outcome measures, e.g. Make at least 2 changes/updates to implementation tactics or outcome measures annually as a result of insights gained through plan assessment.

• How often does plan assessment result in changes to the content of your plan? What typically inspires changes? What process/policies do you follow for making/approving changes?

Assessment almost always results in changes to plan.

If doing good SP assessment, problems/challenges/opportunities that could impact how plan is implemented will inevitably become apparent.

The most effective plan assessment is done at both the micro and macro level; micro—plan tactics; Macro: plan strategies, outcome measures AND changes in the environment. Part of plan assessment must be to keep eyes on the horizon and to pay attention to “disrupters.”

• Do you gather feedback from the constituents you serve as part of plan assessment? What tools, processes do you use to accomplish this? How often do you do it? How do you use the feedback to inform plan changes?

Do annual surveys with constituents; interviews/focus groups in conjunction with other events

Questions: what’s missing, what has changed in their lives, what’s not important, work to identify if there’s a match between what org is doing; what needs are;

Solicit feedback from board members from entities who serve the constituency.

Establish Advisory Councils with constituents; some Councils are used on an ad hoc basis for advice/input; others meet more formally. Good practice to regularly provide information about the organization, its plans and news on an ongoing basis.

Tried to get constituents on board/advisory unsuccessful; switched to conducting more activities in the community as a way to gather feedback from community about programs/services. Resulted in changes to make the approach the organization was taking more culturally appropriate

Quality Improvement begins with an effective needs assessment at the start of the planning process. Ask:

What gives rise to this initiative/program? What does the community/constitution need? Understanding this is fundamental to conversations about quality improvement
• What are the most significant things you have learned about your programs/services and/or organization as a result of plan assessment and what changes did you make to improve the quality/effectiveness of your work?

Fundraising—incremental changes to goal outcomes: from $15,000 to $100,000.

Led to changes in activity—how they did things—small changes led to big impact.

Suggested future topic: What quality improvements can be made to the strategic planning process—how to make it more effective/efficient? How to evaluate the process to make it more robust and make plan itself more robust?