WHAT DOES A STRATEGIC PLAN LOOK LIKE

AND

HOW DO YOU KEEP IT RELEVANT

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WRITING THE STRATEGIC PLAN

1. Identify the Writer of the Plan

2. Choose What to Include In the Strategic Plan

A strategic plan should be a relatively simple and succinct document that summarizes why the

For an abbreviated strategic planning process, the strategic planning document will probably be no more than three to eight pages in length and will include mission and vision statements, a summary of core strategies, and a list of long-term and short-term program and management/operations priorities. The edited notes from the retreat may serve as the appendix.

For a **moderate planning process**, the strategic planning document will probably be 8-12 pages and will include the following:

- Introduction by the president of the board (one page)
- Mission, Vision, and Values Statements (one page)
- Summary of core strategies (one page)
- List of long-term and short-term program and management/operations priorities or program and management/operations goals and objectives (four to six pages)
- Optional appendices: summary of environmental assessment, summary of client surveys, summary of any other stakeholder surveys or interviews (one to three pages)

For an **extensive strategic planning process** and/or a multi-department organization, a document that is 12-40 pages will most likely be needed. A table of contents for such a strategic planning document usually will include the following:

I. Introduction by the President of the Board
II. Executive Summary
III. Mission Statement (and Vision and Values Statements)
IV. Organization History and Profile
V. Summary of Core Strategies
VI. Program Goals and Objectives
VII. Management/Operations (Administrative) Goals and Objectives
VIII. [Possible] Appendices
A. Summary of environmental assessment: strengths, weaknesses, opportunities, and threats
B. Summary of client surveys, community interviews, etc.
C. Membership of Board and Planning Committee
D. Long-range budget projections

Such a table of contents should help writers as they begin to organize their thoughts and their material.

A detailed description of what is usually in an extensive strategic planning document

I. Introduction by the President of the Board
A one-page cover letter from the President of the organization's Board of Directors introduces the plan to readers; it gives a stamp of approval to the plan and demonstrates that the organization has achieved a critical level of internal agreement. (This introduction is often combined with the Executive Summary below.)

II. Executive Summary
In one to two pages, this section should summarize the strategic plan. The executive summary should reference the mission and vision, highlight the core future strategies and major program and administrative priorities (what the organization is seeking to accomplish), and perhaps note the process for developing the plan as well as thank participants in the process. From this summary, readers should understand what is most important about the organization. (Note: This executive summary might be published in the organization's newsletter or special mailing to supporters and participants in the planning process.)

III. Mission Statement (and Vision and Values Statements)
The mission statement, not more than one page, can stand alone without any introductory text, because essentially it introduces and defines itself. Optional vision and values statements may also be included. (See Phase 2 for examples).

IV. Organization Profile and History (note: this section may be included as an appendix instead of as a part of the main strategic planning document)
In one or two pages, the readers should learn the story of the organization --key events, triumphs, and changes over time -- so that they can understand its historical context (just as the Planning Committee needed to during the information gathering phase of the planning process). Major accomplishments for the past year should be highlighted in this section as well. Depending on how well the reader of your
strategic plan knows your history, this section may be as detailed or as short as you need it to be.

V. Summary of Core Strategies
Sometimes organizations omit this section, choosing instead to "cut to the chase" and simply present goals and objectives. The advantage of including this section is that it makes explicit the strategic thinking behind the plan and tells readers where the organization will be primarily focusing its resources over the next few years. The section might be presented as a brief listing of the organization’s core future strategies or as a narrative that covers one or two pages and includes some background and key priorities.

VI. Program Goals and Objectives
In some ways the program goals and objectives are the heart of the strategic plan. The mission statement answers the big questions about why the organization exists and how it seeks to benefit society, but the goals and longer term objectives are the plan of action— the specifics of what the organization intends to do over the next few years. As such, this section should serve as a useful guide to annual operational planning and a reference for evaluation. Depending on the complexity of the organization this section may be three to fifteen pages in length, but multidepartmental institutions and very large organizations often exceed that number of pages. (See Appendix x for a sample of ASO/USA’s Program Goals and Objectives)

VII. Management/Operations (Administrative) Goals and Objectives
The management/operations functions are separated from the program functions here to emphasize the distinction between service goals and organization development goals; this section gives the reader a clearer understanding of the difference and the relationship between the two. This section directly addresses what resources are needed to support the service goals. Goals typically include: Staffing and Benefits, Resource Development, Board of Directors, Planning and Evaluation; Public Relations/Marketing; Infra-structure (includes technology, financial and information reporting, and facilities, and Networking and Collaboration. Depending on the complexity of the organization, this section usually is three to twelve pages in length, but may be longer.
Examples:

**Staffing and Benefits:**

**Goal:** To attract and retain qualified paid and volunteer staff and ensure the delivery of quality services

**Staffing Objectives:**
- Increase number of paid staff from 20 full-time employees to 35 full-time employees to support our ability to provide needed services, and increase the number of volunteer hours per year from 5,750 to 9,000
- Assess whether more complex and differing needs of clients require certain jobs that were done by volunteers to be done by paid staff

**Salaries and Benefits Objectives:**
- Assess overall salary structure and benefits package; develop and implement a plan to increase staff salaries and offer a competitive benefit package
- Analyze fringe benefits package on an ongoing basis and identify ways of meeting employees needs (such as pension plan, cafeteria approach to benefits, etc.)
- Review personnel policies annually to make sure they are in legal compliance

**Training, Evaluation, and Other Support Objectives:**
- Establish and maintain a more formalized ongoing training program for all staff and volunteers
- Implement and maintain a new staff evaluation system that establishes overall objectives for positions and specific objectives for all employees
- Expand our volunteer and paid staff appreciation program
- Develop and coordinate an agency-wide management training program to help staff build skills needs to perform their duties and interface with other departments including a cross-training program

**Volunteers**
- Supervise overall fund-raising functions and work closely with Board and manager staff to develop and implement a successful development program
- Establish and maintain a computerized donor history file and increase the personal contacts made with donors

**Board of Directors role in fund-raising Objectives:**
- Maintain a board giving policy that requires all Board members to contribute financially to the organization
- Increase the board’s participation in all aspects of fund-raising

**VIII. Appendices**

The reason to include any appendices is to provide needed documentation for interested readers. Perhaps no appendices are truly necessary (many organizations opt for brevity); they should be included only if they will truly enhance readers' understanding of the plan, not just burden them with more data or complicating factors. Most organizations at the very least will summarize strengths, weaknesses, opportunities, and threats here, and results of any client/customer surveys. Appendices can be from one to five pages, but could be considerably longer.
Writing the Strategic Plan

For an abbreviated strategic planning process, the writer(s) of the plan simply needs to use the notes from the planning retreat and summarize the key ideas on paper. If at the retreat the group decided to rewrite its mission statement, two or three individuals might collect each participants “Creating a Mission Statement Worksheet 4” and ideas generated during the retreat discussion and craft a revised statement. The newly drafted mission statement would be given to the strategic plan writer to include in the final document. The key to writing the plan is to keep it simple and short, circulate it among internal stakeholders for their comments, and then submit the final version to the board of directors for approval.

The rule of thumb for writing the extensive strategic plan is the same rule for writing the abbreviated strategic plan: keep it simple and keep it short (or as short as you can so that it provides enough guidance to develop an annual operating plan, but not so long or complex that no one reads or uses it)! The heart of the strategic planning document is the core strategies and program and administrative priorities/goals and objectives sections. The supporting data should all be contained in the strategic plan’s appendices.

For multi-department organizations, overall strategies and overarching program and management/support goals and objectives for the entire organization should be developed first. Then, each department manager or director would be responsible for developing goals and objectives for his or her department, making sure that the departmental plan was consistent with the overall organization plan. The prime writer or writers of the extensive strategic plan would then incorporate those department plans into the overall strategic planning document.
**Should Strategic Plans Include Year by Year Objectives?**

If the board and staff insist on a plan that includes year by year objectives, the format might look like this:

**Sample Goal with 3 Year Objectives**

<table>
<thead>
<tr>
<th>Goal: Increase the graduation rate of girls in high school</th>
<th>Year 1 Objectives</th>
<th>Year 2 Objectives</th>
<th>Year 3 Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete study of current services available in the city for high school girls. Develop a program to offer enhanced support to girls from ABC High School.</td>
<td>Implement pilot project for at least 10 girls from grade 9.</td>
<td>Continue pilot project. By year end evaluate progress and decide whether to continue.</td>
<td></td>
</tr>
<tr>
<td>Continue to offer after-school tutoring program for 20 girls from grade 9 – 12.</td>
<td>Ongoing</td>
<td>Ongoing</td>
<td></td>
</tr>
<tr>
<td>Initiate job training program for at least 5 girls, in collaboration with Jobs Training Institute.</td>
<td>Increase number of girls served to at least 15.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update tutorial materials for all grades.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Mentor Program: Match at least 60% of participating girls up with mentor.</td>
<td>ongoing</td>
<td>ongoing</td>
<td></td>
</tr>
<tr>
<td>Sponsor “Bring Your Daughter to Work” Program</td>
<td>ongoing</td>
<td>ongoing</td>
<td></td>
</tr>
</tbody>
</table>
Alternative Formats for Strategic Plans

As stated above, strategic plans usually have all of the following components: introduction by the president of the board; executive summary; mission statement (and vision and values statements); organization history and profile; core strategies. In addition, most strategic plans also have a section that includes a detailed narrative of program goals and long term objectives, and management/operations (administrative) goals and long term objectives. There is no rule, however, that says that you have to follow any one format.

Some organizations use a columnar format to describe their goals and long term objectives, rather than an outline narrative. The columnar format allows the reader of the plan to easily see the connection between goals, sub-goals, and objectives. The inclusion of the commentary column allows the reader of the strategic plan to have a greater understanding of why the goal is important. The inclusion of either background, historical data, or a summary of the future emphasis or focus of the goal helps the reader to put the goal in some context.
Example:

**SUPPORT SERVICES** – **GOAL:** Ensure that families have a safe place to express their feelings and to lessen their sense of isolation.

<table>
<thead>
<tr>
<th>A. SUPPORT GROUPS: Goal: Ensure a structured yet informal support group process that encourages families to seek support and offer support</th>
<th>Commentary: Support Groups are the heart of SFCD. Support groups are the primary places where families meet and connect. Support groups continue to receive the highest rating from parents/caregivers who have used them. We have also found that although all families who have children with different disabilities have much to share -- there are some disabilities or issues that are so prevalent, that it is critical to provide a group focusing on that specific disability, or that issue. In addition to parents/caregivers, children with disabilities, as well as their siblings benefit from having a safe place to share their feelings/experiences. In response to these needs, we offer support groups such as the sibling group. <strong>We want to continue the support groups that we have and also be flexible and expand to meet new needs in San Francisco.</strong> We are trying to create as much accessibility as possible by providing groups in different communities, in different languages and with child care.</th>
</tr>
</thead>
</table>
| 1. Use the expertise of a Mental Health Coordinator to provide support to group leaders, and maintain an infrastructure to ensure the support groups success.  
2. Increase numbers of support group participants by enhancing our ability to address their needs through assessment and evaluations.  
3. Provide a group in Bay View and/or Western Addition.  
4. Improve the linkage of group members to Support for Families vision, services and activities.  
5. Plan and implement a support group initial orientation. |

<table>
<thead>
<tr>
<th>B. PEER MENTOR PROGRAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOAL: Provide opportunities for families/family members to gain support from another individual, who has had personal experience with the disability world, is culturally/linguistically a good match, has been trained by Support for Families and will provide follow up. This is known as &quot;Peer Support&quot;, Mentoring, &quot;Family to Family&quot; or &quot;Parent to Parent&quot;</td>
</tr>
<tr>
<td>Commentary: Parent-to-parent offers families’ support from an individual who has shared a similar experience. Individual peer support is important because not everyone benefits from the group experience. Many families are very private about their experience and being a part of a group may be overwhelming and sometimes even threatening. Also, by offering individual support, an individual can connect with a family when it is convenient for them, or when the need arises, as opposed to group attendance, which has a pre-set schedule. <strong>We have developed a model that works really well and would like to expand this model to include siblings and children with disabilities as mentors.</strong></td>
</tr>
</tbody>
</table>
| 1) Maintain the cultural diversity of trained mentors.  
2) Provide mentor training in Chinese and Spanish.  
3) Increase the numbers of mentor matches to an average of 10 a month.  
4) Increase the annual participation of the mentor support group to 20 participants.  
5) Maintain the quality of Mentors and continue Mentor training.  
6) Explore the possibility of expanding the model to include youth. |

Another option is to write each goal with both long range, and short range objectives. This helps to tie the strategic plan directly to the annual operating plan.

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Example: Tying Strategic Plan Program Goals Directly with an Annual Operating Plan

Program Goal: Performance program

Commentary: Schola Cantorum seeks to presents the highest quality performances possible for a community-based choral ensemble. Through our concert series we showcase the rich diversity of choral music genres and styles as well as choral masterpieces from the music tradition. We seek to challenge, inspire and entertain both our singers and audiences through a balanced program of familiar and lesser-known/new works, and to continue to promote the writing of new choral music through commissions and premieres.

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Continue to raise the artistic &amp; professional level of invited guest artists and outside orchestras and ensembles</td>
<td></td>
<td>Identify guest artists for '99-2000 season</td>
<td></td>
<td>Jan - Feb '99</td>
<td>MD</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Continue to allow for higher guest artist fees in FY2000</td>
<td></td>
<td>March '99</td>
<td>ED to submit guest artists budget for approval by the board</td>
<td></td>
</tr>
<tr>
<td>Continue to present four - five concerts per year, but be open to adding additional/run-out performances</td>
<td>Balance time constraints of singers with need to develop/expand audiences</td>
<td>Research possibilities for run-out &amp; community performances in 1999-2000 season</td>
<td></td>
<td>by June '99</td>
<td>MD, ED &amp; MM</td>
<td></td>
</tr>
<tr>
<td>Continue to commission new choral works and arrangements</td>
<td></td>
<td>Plan commission for 1999-2000 season</td>
<td></td>
<td>July - Oct '98</td>
<td>MD</td>
<td></td>
</tr>
</tbody>
</table>
Examples: Tying Strategic Plan Administrative Goal Directly with an Annual Operating Plan

6. Staffing and Benefits: To attract and retain qualified paid and volunteer staff for all services and activities

<table>
<thead>
<tr>
<th>What do we want to have accomplished in the next 5 years?</th>
<th>Intermediate Milestones</th>
<th>What do we want to accomplish this upcoming year?</th>
<th>Measures of Success; Feedback and Evaluation Mechanisms</th>
<th>Who Responsible</th>
<th>By When?</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1. Staffing</td>
<td></td>
<td>6.1.1. Increase number of paid staff from 8 FTE employees to 15 FTE to support our ability to provide needed services</td>
<td>Hire a new Client Services Director and Client Services Specialist; Hire PT Technology Specialist and PT Clerical Worker</td>
<td>Jan Doe</td>
<td>By mid Year</td>
</tr>
<tr>
<td>Increase number of paid staff from 8 FTE employees to 15 FTE to support our ability to provide needed services</td>
<td>Hire staff for new program that will begin in next 18 months.</td>
<td>6.1.2. Develop revised job descriptions for all staff</td>
<td>All job descriptions by revised by end of fiscal year.</td>
<td>Clare Wilson</td>
<td>By beginning of new fiscal year</td>
</tr>
<tr>
<td>6.2. Salaries and benefits</td>
<td></td>
<td>6.2.1. Assess overall salary structure and benefits package; develop and implement a plan to increase staff salaries and offer a competitive benefit package</td>
<td>Revised salary range schedule and personnel policies approved by the Board.</td>
<td>Board Personnel Task Force with consultant</td>
<td>By year end</td>
</tr>
<tr>
<td>6.2.1. Bring salaries up to par with similar agencies and offer health, vision, and dental to all.</td>
<td>Offer new medical benefits package within 2 years.</td>
<td>6.2.2. Revise personnel policies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.2.2. Review personnel policies annually to make sure they are in legal compliance</td>
<td>Start Retirement Program (non-employer match) by year 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources Required:</th>
<th>Resources Required:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Optional)</td>
<td>(Optional)</td>
</tr>
<tr>
<td>15 FTE in terms of current dollars:</td>
<td>11 FTE in terms of current dollars:</td>
</tr>
<tr>
<td>$675,000</td>
<td>$495,000</td>
</tr>
<tr>
<td>Benefits:</td>
<td>Benefits:</td>
</tr>
<tr>
<td>$135,000</td>
<td>79,200</td>
</tr>
<tr>
<td></td>
<td>Consultant</td>
</tr>
<tr>
<td></td>
<td>$5,000</td>
</tr>
</tbody>
</table>

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Writing the SP and Keeping It Relevant
Source: Adopted from Strategic Planning for Nonprofit Organizations – A Practical Guide and Workbook, by Allison and Kaye Wiley and Sons, Spring 2004
Revised Edition (John)
Another format option is to eliminate the long term program and administrative goals sections and only show core future strategies with detailed list of priorities:

**Strategy: Increase our visibility**

Background/Commentary: Prior to and during the strategic planning process, staff and Board members discussed the importance of Lambda Legal developing and implementing a strategic marketing program to advance its mission and fundraising goals. Marketing strategies will play a critical role in helping Lambda Legal continue to position itself as a leader on LGBT, HIV and AIDS issues. An effective marketing program will strengthen Lambda Legal in at least four ways. First, it will increase Lambda Legal’s visibility, strength and credibility with the broader public as a civil rights spokesperson and change agent. Second, it will help make Lambda Legal the “go to” organization for the media, for clients needing legal assistance, and for groups inside and outside our community who need a legal/civil rights partner on LGBT or HIV matters. Third, it will increase our capacity to educate and mobilize the LGBT and HIV communities to act in their own behalf to secure their rights. Fourth, it will increase Lambda Legal’s fundraising capacity, which in turn will secure and increase our program capacity.

**Priorities:**

1. Hire an experienced marketing director and implement an intentional marketing strategy.

2. Broaden and deepen Lambda Legal’s identity as the leading legal/civil rights LGBT organization.

3. Integrate marketing considerations into all aspects of Lambda Legal’s work in a strategic and responsible manner.

4. Ensure sufficient staffing and other resources to allow for implementation of Lambda Legal’s marketing strategy.

The bottom line for the strategic planning document format is: use whatever format will easily communicate to internal and external stakeholders what you intend to accomplish and how you will accomplish it.

3. **FINAL STEP -- Approval of the Strategic Plan and Next Steps**
STRATEGIC PLANNING MAGIC TRICKS... REVEALED

REACHING CONSENSUS:
THE OFFICIAL STORY—
EVERYONE WORKED AS A
TEAM TO DETERMINE WHAT
WAS BEST FOR THE
ORGANIZATION!

HOW IT WAS REALLY DONE—
YOU ARE GETTING
SLEEPY... YOU ARE PUTTING
INSIDE YOUR
PERSONAL
AGENDA AND STRIVING FOR
Consensus...

WRITING THE PLAN:
THE OFFICIAL STORY—
WE SYSTEMATICALLY
ANALYZED ALL
THE DATA WE'D
GATHERED AND
FORMULATED IT
INTO A PLAN.

HOW IT WAS REALLY DONE—
I'VE SHUFFLED
ALL OF YOUR
SHREDDED DATA
INTO THE HAT.
NOW, ONE TO
THE MAGIC WAND
AND...

IMPLEMENTING THE PLAN:
THE OFFICIAL STORY—
AFTER INTENSIVE
PROPOSAL WRITING,
WE FOUND THE
NEEDED FUNDING
TO IMPLEMENT
THE PLAN.

HOW IT WAS REALLY DONE—
I'LL GAIN
YOU THE MONEY
YOU NEED TO
DO EVERYTHING
YOU CONSIDERED,
INCLUDING
ENDING WORLD
HUNGER!

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1. Managing the Transition: The Changes Required for Success

Now that the strategic plan has been approved, the work of implementing it begins. The starting place for that implementation should be on identifying the changes—the skills needs, and the systems and structures and organization culture changes, that bridge the gap between the old way of doing things and the new ways things need to be done.

Often, when strategic plans are not used to guide decision-making or implemented successfully, it is not the plan itself that was flawed or had “failed”, it was the failure of board and staff to take responsibility for its implementation. And, many times, that responsibility fails to happen because they have not recognized—or taken ownership of—the changes that need to be made to support a new vision.

There are three “levels” of changes that need to be looked at:

1) Skills—what new skills will board and staff need to successfully implement the strategic plan.

   Example: One organization's core strategy focused on becoming less dependent on government funding. Both the board and staff needed to increase their skills in such areas as individual solicitation, grant-writing, etc.

2) How might the current structures and systems (such as accounting decision-making, and communication systems and structures) need to change in order to support the new vision.

   Example: One agency set as a major priority greater delegation of authority of departmental and program managers. However, the accounting system that was in place was not designed to produce user-friendly reports that monitored budgeted to actual expenses for programs; the outdated system monitored expenses and revenue by funding source. The financial staff needed to make the accounting system meet the needs of the agency, not simply the funder.

3) How might the “organization’s culture” (mindset) need to change to support new core strategies. Organization culture is “the behaviors that mirror the practiced values and beliefs of the organization and its members.”

   Example: One of the core future strategies for a multi-site social service agency focused on ensuring that the strategic direction set for the organization was supported by the appropriate organizational infrastructure. Infrastructure changes included optimizing operational processes and patient service delivery methodologies to provide integrated and seamless delivery of service. It also included improving facilities and IT systems to meet the expected increase in demand for the organization’s services. In order to successfully implement this strategy, management needed to work with staff to change from a “site centered” mindset to a “client centered” mindset.
Creating an Annual Implementation Plan to Support the Strategic Plan

Characteristics of a Useful Annual Operating Plan
There are three important characteristics of a useful annual operating plan:

1. An appropriate level of detail -- enough to guide the work, but not so much detail that it becomes overwhelming, confusing, or unnecessarily constrains flexibility
2. A format that allows for periodic reports on progress toward the specific goals and objectives
3. A structure that allows a user to easily see that it is consistent with the priorities in the strategic plan

The appropriate level of detail depends on how much authority or latitude staff have to use their judgment in pursuing objectives. Jack Welch, CEO at General Electric, says he doesn't even want to know about any decisions which cost less than $25 million to implement. Below this expenditure level, his staff has the authority to use their own judgment in pursuing corporate objectives. Few nonprofit staff will have quite this much authority! Typically, more detail is useful when a program is new, staff is inexperienced, or actions in one program area have extensive implications for the operation of other programs. In general, the more concise the operating plan, the easier it is to implement and the easier it is to monitor. So, provide only as much detail as is appropriate!

The format of an annual operating plan is important. A confusing format belies confused thought, and inevitably leads to confused implementation. There are two questions to ask yourself about your annual operating plan format:

1. Can everyone who needs to use the plan make sense of what it says?
2. Are the objectives and action steps written and organized in a way that makes it easy to monitor?

Develop a User-Friendly Annual (Work) Plan

Two sample operating plans are shown below. The first is for a government agency, the second is for a fictional development effort at a nonprofit agency.
### Annual Operating Plan for a Government Agency

**Overall Commerce Agency Goal 1:** Increase economic development capacity to foster job creation and business investment at the local level by facilitating statewide development of local and regional organizations.

**Enterprise Zone Unit Goal 7.2:** Enhance the application of the tax incentive programs by (1) completing the designation process for approval of new zones and by (2) offering suggestions for the improvement of the programs of those previously approved.

<table>
<thead>
<tr>
<th>Task</th>
<th>Measure</th>
<th>Staff</th>
<th>Date</th>
<th>9/03</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Select and train scoring team for final Enterprise Zone application</td>
<td>Select two sets of five scorers</td>
<td>AB/PM</td>
<td>Dec 2002</td>
<td>Done</td>
</tr>
<tr>
<td>2. Print and distribute scoring materials and final applications</td>
<td>Distribute materials to scorers</td>
<td>AB/PM</td>
<td>Sept 02-Dec 02</td>
<td>Done</td>
</tr>
<tr>
<td>3. Conduct technical review</td>
<td>Complete six technical reviews</td>
<td>AB/PM</td>
<td>Sept 02-Jan 03</td>
<td>Done</td>
</tr>
<tr>
<td>4. Conduct substantive review</td>
<td>Complete six substantive scorers</td>
<td>PGN</td>
<td>Oct 02-Feb 03</td>
<td>Done</td>
</tr>
<tr>
<td>5. Tabulate results of scoring team</td>
<td>Compile two sets of results</td>
<td>PGN</td>
<td>Oct 02-Feb 03</td>
<td></td>
</tr>
<tr>
<td>6. Announce winners of competition</td>
<td>Two press releases and two e-mails</td>
<td>JW and PM</td>
<td>Feb 02</td>
<td></td>
</tr>
</tbody>
</table>
**Example of Successful Action Plan**

**Annual Goal:** (same as strategic plan goal): Acquire a stable, broad base of financial and non-financial resources to support our museums’ programs.

**Long Term Objective 1:** (same as strategic plan objective): Double the amount of foundation or corporate support that we receive.

**Annual Operating Plan Objectives:** (what needs to be accomplished this year to support long term objective):
1. Secure $25,000 for the new children’s art program by end of calendar year
2. Maintain foundation and corporate contribution levels at least at current level.
3. Raise at least total $150,000 unrestricted revenue from new foundation and corporate sources.

**Feedback Mechanisms:** (check-in mechanisms to ensure that the work is being accomplished):
- Director of development will provide a monthly status report of all proposals pending, accepted, or declined.

**Resources Required:**
- ½ FTE Development Associate; $5,000 to produce annual report

**Detailed Action Plan:** (What activities need to happen, who is responsible for making sure they happen, and by when; status report updated quarterly).

<table>
<thead>
<tr>
<th>Action steps for securing $25,000 for new children’s art program</th>
<th>Responsible personnel</th>
<th>Time frame or status as of by when</th>
<th>Status as of 3/31/03</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Develop proposal to describe program</td>
<td>Selena Garcia, Program Director</td>
<td>January 1, February 1</td>
<td>1-Done: It looks beautiful!</td>
</tr>
<tr>
<td>2. Research possible funders and develop Proposal* (*designated list of at least ten prime mover) prospective funders</td>
<td>Susan Seeker and Pam</td>
<td>February 1, 2/15</td>
<td>Completed 1/25/03</td>
</tr>
<tr>
<td>3. Arrange interviews with each prospect</td>
<td>Pam Proposal</td>
<td>February 15</td>
<td>3/1/03</td>
</tr>
<tr>
<td>4. Submit at least Pam Proposal three proposals</td>
<td>April 15</td>
<td>Three proposals submitted as of 3/31</td>
<td></td>
</tr>
<tr>
<td>5. Follow up on Pam Proposal proposals</td>
<td>Two weeks after submission</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Cash the checks!</td>
<td>Pam Proposal</td>
<td>As soon as the money arrives!</td>
<td></td>
</tr>
</tbody>
</table>
ENSURING A PLAN'S RELEVANCE

Monitoring the Strategic Plan: Update of Core Strategies

- For EACH core strategy (or goal), staff notes accomplishments, nonaccomplishments, and any changes in the environment since the last strategic planning meeting. At either a board meeting or at a combined board/staff planning retreat, additional comments should be added to the initial perceptions.
- If necessary, make changes in core strategies/goals and long-term and short-term priorities.

<table>
<thead>
<tr>
<th>STRATEGY or GOAL</th>
<th>VIII. STAFF PERCEPTIONS</th>
<th>IX. ADDITIONAL COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regarding this strategy, what have we accomplished to date in the plan? What have we not yet accomplished?</td>
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<td></td>
</tr>
<tr>
<td>What are our organization's strengths and core competencies today in relation to this strategy?</td>
<td>What are our organization's strengths and core competencies today in relation to this strategy?</td>
<td></td>
</tr>
<tr>
<td>What are the main opportunities for our organization in the current landscape?</td>
<td>What are the main opportunities for our organization in the current landscape?</td>
<td></td>
</tr>
<tr>
<td>What are the our organization’s weaknesses? What threats is the organization currently facing in relation to this strategy?</td>
<td>What are the our organization’s weaknesses? What threats is the organization currently facing in relation to this strategy?</td>
<td></td>
</tr>
<tr>
<td>Are we still on track?</td>
<td>Are we still on track?</td>
<td></td>
</tr>
<tr>
<td>Does this strategy make sense?</td>
<td>Still make sense?</td>
<td></td>
</tr>
<tr>
<td>Issues that still need to be addressed? New or changed priorities?</td>
<td>Issues that still need to be addressed? New or changed priorities?</td>
<td></td>
</tr>
</tbody>
</table>

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Writing the SP and Keeping It Relevant

Source: Adopted from Strategic Planning for Nonprofit Organizations – A Practical Guide and Workbook, by Allison and Kaye

Revised Edition (John Wiley and Sons, Spring 2004)
SUMMARY OF STRATEGIES and GOALS, MEASURABLE OUTCOMES, and PROGRESS TO DATE

1. Invest in our capacity to support programs, in terms of staffing, infrastructure, and governance

Commentary: Our capacity to grow programs and continue to maintain quality services is limited by the extent to which we have invested in our infrastructure. While we have made progress in recent years in terms of facilities, administration, financial systems, and human resources, there is still a need to build a strong enough infrastructure to support current and new programs.

1.1. Staffing: Increase our capacity to recruit and retain the level of talent needed to provide services and further our mission

<table>
<thead>
<tr>
<th>Staffing Goals</th>
<th>Progress to Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1. Improve salaries so they are more competitive</td>
<td></td>
</tr>
<tr>
<td>1.2. Improve benefits package</td>
<td></td>
</tr>
<tr>
<td>1.3. Provide all staff with agency assisted professional development</td>
<td></td>
</tr>
<tr>
<td>1.4. Ensure sufficient program and administrative staff</td>
<td></td>
</tr>
<tr>
<td>1.5. Establish process to review salary and benefit structure on an ongoing basis</td>
<td></td>
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</tbody>
</table>