

Instructions

Each year, this short, two-part worksheet can be completed by the Board and staff team individually or as a group. The responses to worksheet prompts assist the Board and staff team in evaluating progress and planning for the next year.

Part 1 What can be celebrated?

- One or more outcomes from the Strategic Plan fully completed.
- One or more outcomes from the Strategic Plan partially completed.
- The organizational team surpassed expectations with any outcomes.
- The organizational team is excited about current accomplishments.
- An outcome from the Strategic Plan is now obsolete because of fluid changes in the organization or the sector.

Take Action

Literally take a marker and cross-out those outcomes in the Strategic Plan that are no longer needing your team's brain space. With the Board and staff team, draft language about these accomplishments for celebrating in the website, annual report, and thank you letters to donors.

Part 2 Targets for the year ahead

- Outcomes in the Strategic Plan that need to be accomplished match-up with major events, activities, or agenda items already planned for the year ahead.
- Outcomes in the Strategic Plan that need to be accomplished align with the personal and professional goals of specific Board and staff members. Can these members be the year-long champion for accomplishing an outcome?
- Outcomes in the Strategic Plan that need to be accomplished align with open positions currently being recruited/hired for. Can the new Board or staff member be the year-long champion for accomplishing an outcome?
- Outcomes in the Strategic Plan that need to be accomplished require funding allotment and should go before the Board for an immediate planning session.
- Of the outcomes that were attempted last year, there were roadblocks. (What can be done?)
- Based on what was learned from engaging the Strategic Plan last year, some of the outcomes need to be adjusted (e.g. increase benchmark).

Take Action

With the Board and staff team, literally plan the ways that some Strategic Planning outcomes will be met by existing major events, activities, or agenda items. Include details of this alignment between accomplishing those outcomes and existing calendars items.

Hold one-on-one meetings with current Board and staff members who you know are eager to build skills and champion certain Strategic Planning outcomes. Together, brainstorm what qualifies as "championing" and get buy-in. Make a fun and exciting announcement of the new champion and what is entailed in championing through the organizational newsletter, weekly email from the Executive Director, etc.

With the Board and managers, decide which job descriptions should be updated with components that reflect Strategic Planning outcomes that need to be accomplished. Also collaborate with the Board team on the needed funding for any outstanding outcomes.