

June 2011

Living Into Your Strategic Plan:  
A Guide to Implementation  
That Gets Results

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## Introduction

In the Bridgespan Group's work developing strategic plans with clients, we've often heard a collective sigh of relief when the planning process is over. It's understandable. Strategic planning<sup>1</sup> is hard work. It involves articulating the results for which the organization will hold itself accountable and the actions it will take to get there. Because it is hard work, it's tempting to think that finishing the written plan is equivalent to crossing the finish line.

But, of course, it isn't. Writing a strategic plan is only the first step towards achieving impact year after year. The next step is implementation, and often, that is where organizations stumble. In fact, when responding to the Bridgespan Group's most recent organizational diagnostic survey, staff members at more than 120 nonprofits rated their employers' capacity to implement their strategies 10 percent below their average rating for all other organizational capability areas. Respondents gave their organizations especially low marks on their abilities to break down their strategies into manageable pieces, communicate their visions and the change required to achieve them, allocate the staff and resources needed to achieve plan goals, and monitor progress and adjust course when change is needed. Those weaknesses can result in a lack of awareness of an organization's strategic priorities, and disengagement between what staff members do on a daily basis and progress on those priorities. They can also result in under-resourced priorities that are important in name only, and ultimately, disappointingly slow progress toward achieving the organization's goals.

If any of those symptoms sound familiar, this guide is designed for you. Its contents share Bridgespan clients' experiences as well as insights from other nonprofits that have excelled at building momentum as they moved from planning to implementation. To create the guide, we conducted in-depth interviews with selected leaders of these organizations and solicited input from members of [Bridgestar's LinkedIn peer networking groups](#)<sup>2</sup> for chief executive, operating, and financial officers. Our goal was to better understand how they've successfully lived into their strategic plans and to distill lessons from organizations that have moved from setting strategy to achieving impact. (A complete list of the nonprofit leaders we interviewed is included in the [Acknowledgements](#) section.)

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<sup>1</sup> For more information on strategic planning, please see the Bridgespan article, "[Zeroing in on Impact](#)."

<sup>2</sup> Bridgestar, an initiative of the Bridgespan Group, provides a nonprofit management job board, content, and tools designed to help nonprofit organizations build strong leadership teams and individuals pursue career paths as nonprofit leaders.

The organizations we interviewed share an orientation towards change. They've used practical approaches to convert their visions into tangible actions, and they've been diligent about monitoring progress and correcting course when circumstances change. It's this combination of mindset and implementation management that gets results. This guide presents their methods for implementation in six steps. Within each step, you also will find references to [templates](#) (found at the end of this guide) that illustrate the types of tools these nonprofit leaders used to lead implementation within their organizations.

### Peer-to-Peer Advice for Living into Your Plan

The nonprofit leaders we interviewed were candid about how they moved their organizations from having a plan on paper to living into their strategy. Below we synthesize key insights and learnings from their implementation experiences.

#### Use your strategy as a tool to guide decision making

It is easy to get distracted by the day-to-day challenges of running a nonprofit, and also by new problems and opportunities that may arise unexpectedly. But it's important not to let dust settle on your strategic plan. Once you've gone through the hard work of creating it, it's important to use it as a guide for evaluating opportunities to pursue and how to respond to setbacks. Your strategy will help you stay on track toward your goals only if you refer to it often and continually remind your staff and board of what you are trying to achieve, why, and how you will do so. As one CEO put it, "Having a strategic plan...is what enables you to stay the course, even in times of change."

### When Is It Time to Update Your Strategic Plan?

This guide focuses on implementing strategy. But before taking action, it's important to be confident that your strategy is as strong as it can be. In Bridgespan's experience, changes in any of the following can signal that it is time for an organization to develop a new plan:

**Funding environment:** Are you seeing major shifts in the type and level of support your traditional funders are offering? Do you have a new funder who is concerned about the viability of your organization?

**Policy environment:** Have new policies created opportunities or challenges that will dramatically affect what you can achieve as an organization?

**Competitive environment:** Are new program models emerging that create opportunities for you to serve your beneficiaries more effectively and efficiently? Have new competitors or potential collaborators entered the space in which you've been operating?

**Organizational leadership:** Do you have a new executive director or new board leadership at your helm?

Alternatively, it may simply be time to revisit your strategy if your current plan is expiring (i.e., if you are in the third year of a three-year plan). If any of these circumstances pertain to your organization, it may be useful to review Bridgespan's article "[Business Planning for Nonprofits: What it is and Why it Matters.](#)"

### **Stay flexible in your approach**

The best strategic plans provide strong direction and accountability but do not act as straightjackets. The world in which nonprofits operate is not as clean or neat as the paper on which strategic plans are written. Effective implementation means finding a balance between maintaining a consistent strategic focus and adapting to changing circumstances. Leaders with whom we spoke talked about strategic execution as an iterative process: In order to achieve their organization's [intended impact](#), they needed to be willing to adjust their course. Many organizations experienced unanticipated events that influenced their ability to advance their strategies, such as a major funder shifting its focus or significant changes in government policy. Rather than abandoning their strategies, they changed their tactics, keeping their strategic goals in focus but adapting the specific actions that they were taking based on what they had learned and what the new circumstances required. Ultimately, they mapped out new routes to their destinations.

### **Maintain constant communication**

Successful execution of your strategy requires that all of your stakeholders be acutely aware of your priorities and direction. Many, if not most, strategic plans are formulated between executive teams and boards; too often, the organization's leaders delay or neglect the crucial act of communicating the new or revised organizational vision to staff members. If your organization doesn't understand the strategy and hasn't internalized the need for change, you will lack the buy-in needed to successfully execute the plan. It's important to provide a consistent, clear, and positive message about why the new strategy is the best course of action, and to encourage staff to own its implementation. It's also important to *repeat that message*. Your communications should cover what will be different about the organization, why this change is critical to achieve the impact you seek, and how your staff can play an important role. (More tips on communicating throughout implementation are included in the [Communications Plan Template](#).)

### **Empower change champions**

Some functions will be affected by the implementation process more than others, and staff in these areas may exhibit signs of "change shock," needing time and encouragement to get on board. To address this challenge, look for opportunities to empower "change champions" who can speak to their colleagues' fears and provide compelling messages about why change is necessary. In addition, encourage staff ownership of implementation by enabling them to provide input on changes that will directly affect their individual roles.

### **Phase in implementation with a designated champion**

While some organizations struggle to get started on implementation, others try to take on too much change at once. This can backfire, particularly if your strategy calls for major shifts in the work that your staff and organization are doing. While it may be tempting to launch new efforts, hire staff, and redesign internal functions all in the first quarter of implementation, doing too much at the outset can risk under-

resourcing priorities, burning out your staff, and accomplishing less than if you sequenced the work over time. Consider how you can ramp up implementation, and first tackle changes that your organization is most ready and eager to face. Doing so will enable you to make demonstrable progress immediately, while you build a platform for longer-term changes.

In addition, it is important to have one person responsible for driving the change process forward. For some organizations, this means redefining a senior staff role to direct implementation. Others have a more junior staff member serve as a “traffic cop” to ensure implementation progresses efficiently. In the organizations we studied, the person in charge of implementation was identified early (during the strategic planning process), and they reported directly to the head of the organization, signaling that implementation was of the highest priority. While it may not be possible or necessary for your organization to dedicate a full-time staff member to manage implementation, it is critical to have someone take responsibility for coordinating efforts and maintaining momentum. It also is essential for your organization’s leadership to champion implementation as passionately as they did strategy formulation.

## Implementation that Gets Results: Step by Step



Although the path we've outlined from strategy to implementation may seem linear, executing on your plan is actually a highly iterative process. As you progress, you may find yourself revisiting decisions you made earlier as you learn from your experiences and encounter unanticipated challenges and opportunities. The sixth step, "Revisit and Repeat" underscores the fact that you will need to go through the process annually (or potentially more frequently in times of major flux) in order to stay on track and achieve the impact you seek. (To see an example of this process in more detail, please see the [Simple Process Overview](#).)



### Step 1: Translate Strategic Goals into Actionable Initiatives

As you transition from strategic planning to implementation, your first task is to get specific about the work that needs to be done. Practically speaking, this means going through the process of translating the multi-year, high-level strategic goals articulated in your plan into specific [initiatives](#) that your organization will undertake in the coming 12- to 18-month period. Breaking down your long-term goals into timely, digestible, and definable segments will help create a detailed roadmap that aligns the day-to-day activities of your organization with the overarching mandates of your strategy.

We define initiatives as actions the organization will take to implement its strategy, based on issues, opportunities, or challenges that surfaced during the strategy development process. Initiatives are not just new organizational efforts you're taking on *in addition to* the work you are already doing. In fact, unless your plans call for an immediate expansion of your team or resources, these initiatives may involve

redesigning current programs or phasing out others in order to engage in work that is more directly aligned with your strategy.

Consider how Boys Town used initiatives to drive its strategy forward. Boys Town has a 100-year history of supporting youth and families. In 2010, the organization served over 24,000 youth through long-term, residential and in-home prevention services. In addition to its flagship residential “village” in Omaha, NE, Boys Town operates youth-care programs in 10 states and the District of Columbia, runs a national crisis and referral hotline, and operates a research hospital.

In 2007, after a period of rapid expansion and with a new executive director at the helm, the board and organization’s leadership committed to developing a growth strategy that would increase impact and improve the organization’s economics. Ultimately, that strategy centered on four goals the team believed were critical to achieving Boys Town’s intended impact (summarized below in the accompanying chart). With those goals set, Boys Town staff then defined 11 different initiatives that the organization would pursue to achieve them. Some initiatives were focused on improving and expanding programs; others were focused on building organizational capacity.

### Boys Town national goals and initiatives

	Goals	Initiatives
Programmatic	Serve more children and families through an integrated continuum of care	<ol style="list-style-type: none"> <li>1. Grow to scale in selected high priority states</li> <li>2. Pursue a broader continuum in Nebraska and Iowa</li> <li>3. Integrate NRTC and hotline into program continuum</li> <li>4. Integrate health care and youth care services into a single continuum</li> </ol>
	Improve and maintain program quality	<ol style="list-style-type: none"> <li>5. Conduct research on the intersection of health care and youth care</li> <li>6. Invest in research to build evidence base for linked youth care and health care program continuum and track outcomes</li> <li>7. Grow leading edge research and clinical capabilities with targeted investments in Boys Town National Research Hospital</li> </ol>
Organizational	Improve economics	<ol style="list-style-type: none"> <li>8. Enhance development capabilities</li> </ol>
	Align elements of organization and culture	<ol style="list-style-type: none"> <li>9. Define, prioritize, and fund supporting physical infrastructure needs</li> <li>10. Enhance advocacy and policy capabilities</li> <li>11. Clarify processes               <ol style="list-style-type: none"> <li>a) Decision making</li> <li>b) Planning and budgeting</li> <li>c) Performance measurement, incentives, and feedback mechanisms for staff</li> </ol> </li> </ol>



Once these initiatives were defined, Boys Town to developed an Action Plan for each one, identifying the person who would lead them, the team that would be involved, the actions that would be taken, the up-front investments required, and key milestones. The table below shows some of the related actions, milestones, and investments associated with Boys Town’s initiative around enhancing its advocacy and policy capabilities.

**Initiative 10: Enhance advocacy and policy capabilities**

Actions	Milestones	Up-front Investments
<ul style="list-style-type: none"> <li>Review and refine national advocacy positions required</li> <li>Hire National Advocacy and Policy Director</li> <li>Provide training to site Executive Directors on advocacy and policy approach</li> </ul>	<ul style="list-style-type: none"> <li>National Advocacy and Policy Director position filled</li> <li>Nebraska policy and advocacy team is operational</li> <li>National strategic plan for advocacy and policy developed</li> </ul>	<ul style="list-style-type: none"> <li>National Advocacy and Policy Director salary</li> <li>Search fees</li> </ul>

According to Barb Vollmer, Boys Town’s associate vice president of administrative services, developing this detailed action plan was critical. “It gave [Boys Town] clarity and initial direction,” she said. “Over the years, not everything evolved the way we thought it would, but, as a starting point, it was very important.”

**Defining Initiatives**

We recommend defining the following elements for each initiative.

**Deliverables:** What will be the results of the initiative? How will “success” be measured?

**Initiative leader and team:** Who is responsible and involved in the work?

**Key activities:** What action steps need to be undertaken to achieve the deliverable?

**Resource requirements:** What investments (people, equipment, time, finances) will be needed to carry out the initiative?

**Interdependencies:** How will the initiative affect other functions or areas of the organization? How will it affect other initiatives?

**Milestones:** What are the major events, accomplishments, or key decision points that are anticipated? How will you know if and when your initiative is on or off track?

**Performance metrics:** What will you measure to gauge progress on your initiative? How will you utilize these performance metrics to tell if your initiative is on or off track?

**Timeline:** When will the initiative begin and end? At what milestone will you judge if your initial timeline is correct?

## Templates to Guide Step 1: Translating Strategic Goals into Actionable Initiatives

The following templates, to be used in tandem, offer guidance on developing initiatives that will help your organization manage implementation. The [Initiative Overview Template](#) provides basic detail across all initiatives so that your management team can see, at a glance, the scope of the work to be done and critical interdependencies. The [Initiative Action Plan Template](#) provides detail for each initiative's team members to have clear direction and accountability for achieving results.

The *process* of defining and detailing initiatives is in some ways more important than the completed templates you produce, although this type of documentation is critical for monitoring and adjusting how you implement over time. For example, once Boys Town's leadership team defined the initiatives, each initiative's leader then developed a specific action plan to articulate, coordinate, and sequence the activities involved in that initiative. As Vollmer explained, "Initiative leaders were clear on what they needed to do and when it needed to be done. Getting people to plan forward with clear goals and anticipated contingencies brought a discipline into our organization that wasn't there before."

While it may be tempting to outsource detailed implementation planning to a consultant, it is critical for your staff to be deeply involved. They will have the most realistic sense of what can be accomplished over a certain time period and their buy-in to the deliverables and timeline is essential. In our experience, consultants can help facilitate and bring discipline to the process, but in general, they cannot be used as a replacement for staff engagement.



## Step 2: Create a Blueprint for Change

Once you've translated your strategic goals into initiatives, the next critical step is to consider your set of initiatives holistically to ensure that their scope, length, and required effort are realistic and appropriately sequenced. In essence, you need to create a blueprint for change so that leaders throughout your organization can see how their roles and their departments' work connect to others'. It's important for everyone to understand the big picture, so that it is clear why certain initiatives and changes will start before others. Creating a blueprint for change is about setting the stage to build momentum for the progress to come.

During this step, you should consider how different initiatives will affect each other, as one phase of change may need to be completed or a milestone reached before another step can be taken. Also, reflect on how initiatives affect different parts of your organization. In most cases, implementation will put competing demands on operations and other internal functions such as human resources, technology,

and fundraising. Involving the heads of these departments in the integration process will be helpful, and may lead you to postpone or accelerate some initiatives, or even add resources, if possible. Leaders we interviewed found that these conversations across initiatives, functional areas, and programs built a sense of team cohesion, and helped staff break out of project and departmental silos.

The process of coordinating and integrating initiatives can be challenging because it requires making trade-offs as you determine which initiatives must begin before others. However, recognizing and making these trade-offs up front is important to the successful implementation of your strategic plan. There is only so much work that your staff or organization can handle. To your staff, some projects will be exciting while others might be resisted. By engaging in a purposeful process of integration, you can ensure that critical choices are framed by your strategy rather than by staff interests or other pressures.

Gary Grellman, the chief financial and operating officer of Goodwill Industries of San Francisco, San Mateo, and Marin Counties (Goodwill) believes that creating a blueprint to integrate initiatives across existing organizational functions is the most critical piece of implementing a strategy successfully. Goodwill provides job training and educational services to adults with significant barriers to employment, as well as operating a national chain of used clothing stores. The organization's strategy required several major programmatic and organizational initiatives, each managed by a member of its management team. During the process of creating a blueprint for the strategy, each member fleshed out his or her initiative. Then Grellman created an "Accountability Matrix" to get a visual sense of how the initiatives would be executed over time and by whom. According to Grellman, this process helped Goodwill "achieve clarity in terms of ownership, to make it clear who would help drive goals to reality." As he recalled, "This was the first step in moving away from operating in a siloed fashion to working together in a more collaborative and integrative fashion."

Importantly, when Goodwill first drafted this holistic picture, it became clear that there were too many initiatives being launched simultaneously, and that the same people were responsible for carrying out most of the work. Goodwill's leadership also realized their sequencing was off, and some initiatives needed to be completed before others could be started. Based on this, its executive team rationalized Goodwill's set of initiatives, prioritizing the most important efforts first, such as sales technology, and postponing others until later, such as human resources systems.

## **Templates to Guide Step 2: Creating a Blueprint for Change**

An integrated [Implementation Timeline](#) can enable your management team to gain a holistic view of how various initiatives relate and depend on each other. The [Initiative Overview](#), discussed above, also can provide a concise picture of everything your organization is undertaking.

As you create your blueprint, you may realize that you have to narrow the set of initiatives you plan to take on. You also may find that you need to revisit your first thoughts about sequencing your initiatives. You will need to update your [Initiative Action Plans](#) and [Overview](#) if, for example, some of the initiatives you thought would launch in the first year of your implementation are pushed back to the second year. In the case of Goodwill, which was upgrading its clothing stores, this process resulted in front-loading all of the initiatives related to implementing new point of sale and supply chain management systems, which were critical to the success of the other store initiatives they were undertaking. That decision meant delaying other investments of time and money, such as the improvement of their human resources information systems. This sort of adjustment is a normal part of the implementation planning process and is just one example of the kind of continuous refinement you can expect to make as you live into your plan and execute your strategy.

### Questions to Consider: Integrating Initiatives

- Do any initiative timelines need to be shifted due to interdependencies or pinch points? Does one initiative need to reach a milestone or finish before another can start or continue?
- Are your timelines realistic considering current workloads?
- Do you have sufficient financial resources to complete the initiatives?
- If planned progress is made on each individual initiative, is the organization on track to achieve its strategic priorities? Are any critical pieces or phases missing?



## Step 3: Mobilize the Team

Effective implementation hinges on getting your staff on board with the strategy. Executing on your plan undoubtedly will require that your staff do things differently, and helping them make those shifts can be difficult. For the purpose of mobilizing your team, it is useful to focus on two key elements for success: 1) communicating a compelling case for the change required, and 2) aligning individual staff member's performance goals to your organization's strategic priorities.

Communicating your strategy with your team is essential because your staff needs to know where the organization is going in order to move along with it. Start by articulating a powerful vision for a better organizational future by painting a convincing picture of an organization that your staff can believe in and will work to build. *What outcomes do you envision for the people or causes you serve?* Communicate your excitement for those outcomes, and for what your organization can and will achieve. Make sure your

team members understand that they play a critical role in achieving progress on the strategy. Involve members of, at least, your management team, if not your entire staff, in considering what it will take to change your formal structures, cultural norms, and procedures to support the strategy. Convey empathy and understanding about the impact the changes will have on them, but couple it with a clear message that change is both important and inevitable.

As Jumpstart's Chief Executive Officer (CEO) James Cleveland emphasized, "The real key to implementation is that we embed the strategy in every conversation we have as an organization." Jumpstart is a national organization that helps preschool children in low-income neighborhoods develop the skills they need to be ready to start school, setting them on a path for lifelong success. At the completion of its strategic planning process, Cleveland led an organization-wide video chat to launch the strategy. His objective was to articulate a vision that clarified where the organization was going, generate excitement for the new vision, and help his staff understand that there was no option but to move forward. The speech was recorded so that those who couldn't attend could listen to it later.

### Questions to Consider: Ongoing Communications

- Who are your organization's major audiences? (i.e., staff members, board members, management team, etc.)
- What information do they need about your strategy to support implementation?
- What is the best format for reaching them (i.e., email, newsletters, regular meetings, retreats)?
- Who needs to deliver the message for greatest effectiveness?
- When do they need information, initially and ongoing, as implementation progresses?

To communicate the major shifts the organization would be making, Jumpstart used a framework for each programmatic and organizational change, describing: 1) what Jumpstart does now; 2) what they propose for the future; and 3) supporting data. This helped Jumpstart's staff and board understand where they were headed and why, as well as what they needed to do differently in the future. In almost every organization we researched, the leader gave a similar landmark speech to communicate the strategy and position their organizations for implementation.

Equally important are ongoing communications reminding staff of strategic priorities, the changes required to achieve them, and "strategy wins" as they occur. Jumpstart acknowledges successes through monthly newsletters emailed to all staff, which includes a dedicated space for strategy updates from the CEO. Other organizations do similar things, keeping the strategy at the forefront and celebrating achievements to maintain focus and momentum. A [Communications Plan](#) can help you stay focused on delivering the most important messages at the right times as you implement your strategy. It's also important to be aware that there is often a "disconnect" between what a senior manager believes has

been communicated and what staff and other stakeholders have heard. (For more information, please see [“Beware Your Leadership Blind Spots.”](#))

Beyond communication, mobilizing your staff to execute on the strategy requires creating alignment between what they understand their jobs to be and their roles in implementation. This will be easier to do if you’ve involved your staff in defining the initiatives (see [Step 1: Translate Strategic Goals into Actionable Initiatives](#)) and in creating the roadmap (see [Step 2: Creating a Blueprint for Change](#)) that they will be following. Organizations that successfully execute on their plans use their strategies as the primary lens through which they view all of the work in their organizations. Just as you’ve done at the initiative level, encourage your staff to prioritize the activities they are engaged in, elevating important strategic tasks and de-prioritizing others. As a result, your staff will see implementation-related activities as their core responsibilities, rather than additional tasks on top of the work that they are already doing. It may not be entirely possible to do this, especially if staff members have ongoing roles and responsibilities that don’t fit neatly within a strategic priority or initiative. To help them prioritize strategically relevant tasks, the key is to streamline and simplify other activities where possible. Linking individual performance goals to initiative milestones can help facilitate this shift, ensuring your organization’s performance review process rewards accomplishments that support implementation.

According to Peter Long, CEO of the Blue Shield of California Foundation, one of the most effective things he has done to mobilize his organization’s staff around the strategy has been to align individual performance goals with organization-wide and department-level goals. This process started with the CEO setting and taking responsibility for organization-wide goals. Next, each program director developed goals for their own departments and then iterated on these with the full leadership team. Ultimately, the leadership team honed a final set of department-level goals that supported the organization-wide goals.

The directors then worked with their direct reports to develop individual performance plans that supported their department’s goals. According to Scott Travasos, the foundation’s chief financial officer (CFO), this signaled a fundamental shift in the way the organization’s staff operated. Previously, individual performance goals were activity-based and not necessarily aligned to organization-wide objectives. Today, all staff members have specific, measureable goals that are directly tied to the strategy and are used in their annual performance reviews. According to Long and Travasos, the transparency of this goal-setting process has helped improve alignment and accountability across the organization. They look forward to assessing impact and alignment at different levels of the organization at the end of the year.

### **A Template to Enable Step 3: Mobilizing Your Team and Communicating Plans**

The [Individual Objectives](#) template will help you create objectives for staff members that align with your organization’s strategy. Once you’ve defined individuals’ roles in the implementation process, it’s important for managers and their direct reports to refer to these objectives over time, and build them into

staff members' annual work plans and objectives. Organizations that are rigorous about aligning organizational strategy to individual work plans ensure that managers use them in monthly check-ins, semi-annual check-ups, and annual performance reviews to assess if individuals are achieving their planned objectives. If progress on implementation is slower than anticipated, such checkpoints are opportunities for your staff to identify gaps in their capabilities and skills where they may need additional support or training. Checkpoints also highlight areas where staff members are dependent on others' actions to accomplish objectives so that they can proactively collaborate and identify barriers that may be slowing progress down if not properly addressed. By drilling down from the strategy to individual staff members' objectives—outlined in performance reviews—you can create incentives and rewards that will help you stay on track as you implement and overcome challenges as they arise.



## Step 4: Align Finances to Support Implementation

In addition to staff time, implementing your strategy likely will require shifting finances or acquiring new resources to support strategic goals. For organizations with small amounts of unrestricted financial support, aligning resources to the strategy may require fundraising aggressively to support your strategic priorities and initiatives so that funding restrictions don't slow down your progress.

You may find, as the Cristo Rey Network did, that your new strategic focus will position you to raise funds more successfully. The Cristo Rey Network is a network of 24 high schools created to provide a top-quality, college-preparatory education to economically disadvantaged students. In 2008, Bridgespan worked with Cristo Rey to develop a strategic plan that shifted the organization's focus from growth to improving quality, so that all of their students graduate from the network's high schools ready to succeed in college. According to Robert Birdsell, president and CEO, "For the first six months of implementation, we had to shift funds within our organization to support the strategy, but since then it has been fully funded. Having a very clear strategy and focus gave us a project to sell to funders."

### Questions to Consider: Aligning Financial Resources

- Given your strategic goals, what programs should be continued, modified, or discontinued?
- Are key initiatives getting the resources they need to succeed?
- Does your overall budget reflect your strategic priorities in terms of spend across initiatives and across the organization?
- If you are anticipating a tighter budget year ahead than when the plan was crafted, what principles will your management team use to make tough calls?

For all organizations, living into a strategy requires taking a hard look at how to allocate resources and the changes needed given agreed goals. The approach that Children and Families Commission of Orange County (CFCOC) used provides some helpful guidance on how to align resources to new priorities. CFCOC is a grantmaking organization that utilizes revenues from a sales tax on tobacco products to support education, health, and child development programs for young children. Its leaders developed a new strategy guided by four principles: 1) prioritize resources for the children most in need; 2) direct more resources to children's early learning needs; 3) evaluate children's outcomes versus program outputs; and 4) invest a greater percentage of funds in catalytic versus sustaining activities.

Guided by these principles, CFCOC's leaders determined they needed to make significant changes to what the organization funded. CFCOC used a simple rubric to assess its current programs and grants against its new strategy, considering each on a few dimensions, such as: Is the program targeted to those in most need? Is the program critical to ensure strong outcomes? And, is the program critical to maintain community and/or political support? Based on this assessment, CFCOC's leaders determined whether the organization should keep, modify, or discontinue each program. CFCOC then mapped out how it would make the change over a two-year period, so that by the end of that period, the majority of its funds supported projects directly aligned with the adjusted strategy.

During implementation, CFCOC has continued to use these principles to guide decision making on whether they should keep, modify, or discontinue each program or grant, but the organization also has had to weigh a number of other factors. The declining funding environment in which it has been operating has made these decisions more complex. Given that CFCOC achieves its impact by funding others, a key practical consideration for CFCOC has been its grantees' level of readiness to shift their focus or maintain critical services despite less support. As described by Mike Ruane, executive director of CFCOC, "Implementation is always some variation of the absolute recommendation... It requires adjustment because of gaps in readiness and conditions that change... It should not be an all or nothing game of 'should we follow the strategic plan or not.' Every step you make is progress."

You probably will need to make a number of important decisions regarding resource allocation during implementation, some of which you couldn't anticipate fully as you set your strategy. One approach CFCOC used to ensure that these decisions are consistent with its longer-term strategy was to bring these issues to its governing board on a quarterly basis. Doing so has helped the organization balance its big-picture goals with its day-to-day work.

#### **A Template to Guide Step 4: Aligning Finances to Support Implementation**

Each initiative you undertake has to be adequately resourced over time. That's why it is so critical to develop a resource plan for your initiatives. This [Initiative Resource Planning Template](#) can help your staff think constructively about the costs associated with implementing a strategy. Since many initiatives



require different parts of the organization to work together, they may not be owned by one single department or have a natural champion during the budgeting process when tough decisions and trade-offs get made. However, if you dive into detailed departmental budgeting without considering the resource requirements of your initiatives, you risk underfunding them. One way organizations guard against this challenge is by beginning their annual budgeting process with a focus on the strategy, building in enough time to adjust across several versions and scenarios. There is no magic to this step; strategically-focused budgeting requires a series of tough conversations about what you can and must do to achieve your most important goals, with a commitment to follow through with the necessary resources.



## Step 5: Monitor Progress

Organizations that are effective at strategic implementation have strong processes in place for systematically measuring and evaluating progress towards their goals. Those processes help them remain focused as they execute their strategies, learning and adjusting as they go.

One simple mechanism that many organizations use to monitor progress is the quarterly review. A quarterly review meeting provides an opportunity to bring together all of the people who are leading strategic initiatives. It offers an opportunity to update each other about progress, share lessons learned, identify any dynamics that affect the strategy, and determine what must change about their approach. Once a year, perhaps in the quarterly meeting that occurs before you dive into your budgeting process, it may be useful to do a more extensive annual review of progress against your strategy.

### Templates to Guide Step 5: Monitoring Progress

In order for these quarterly and annual reviews to be effective, we've found a few things are necessary. For example, you need to articulate critical [milestones](#) and [performance metrics](#) for each of the major initiatives that you are undertaking as an organization. This is an opportunity to celebrate progress and achievements, as well as a time to highlight areas where you are off track and why. (For more information on measuring to improve performance, see Bridgespan's article "[Measurement as Learning](#).")

According to Boys Town's Vice President of Program Fidelity Shann McKeever, Boys Town's quarterly strategic review meetings are critical junctures for assessing performance data and identifying tactics "about what we need to do differently to change the plan moving forward." Continuous monitoring and evaluation has enabled the organization to make smart adjustments in a timely fashion. As Boys Town's Vollmer explained, "It feels to me like we are more prepared when things go off plan, and we have the methodology to deal with those things when they occur."

Beyond knowing if implementation is on schedule, another important element of these monitoring meetings is to determine whether you are on track to achieve your goals. In our work with clients, Bridgespan often creates *dashboards*—tools that tell you at a glance if you are making planned progress toward achieving your strategic priorities, both in terms of timeline and anticipated results. You may find it useful to have several versions of a dashboard, including [one for your management team](#) and [one for your board](#). Dashboards also can be useful in ongoing communications with staff beyond your management team, helping to reinforce your strategy and highlight progress.

We've seen dashboards take a variety of formats. The formatting of the dashboard is less important than the thought required to determine useful, available measures of progress and realistic targets. As you develop your dashboard, it's important to keep in mind that dashboards don't populate themselves. That means that you will need to have someone responsible for keeping track of the data, as well as a process in place for updating and reviewing the dashboard on a monthly or quarterly basis. Given this, we've found that fewer measures are better. While you may think you need 20 different performance metrics related to growth, it's generally best if you can boil down the number of metrics in each area to a critical few.

### Questions to Consider: Progress Meetings

#### Quarterly meetings

- Are you on track in terms of your implementation timeline?
- If you are off-track, determine why.
  - Did you underestimate the challenges involved in making progress on a particular issue?
  - Did you have the right staff involved in the process?
  - Did those who were responsible have enough capacity to make expected progress?
  - Did this initiative get de-prioritized due to more pressing concerns?
- What, if any, changes have occurred internally or externally that are affecting strategic execution? What speed bumps are being encountered and how should you course correct?
- Was your timeline realistic? Do you need to update the timeline given changing conditions?
- Do your priorities have sufficient resources?

#### Annual reviews

- What are the most important strategic issues facing your organization this year?
- What significant changes (internal or external) have occurred since you set the strategy and what are the implications for your priorities going forward?
- Given your longer-term strategy, what must you achieve this year?



## Step 6: Revisit Your Strategy and Repeat the Process

Organizations that are most effective at implementation over time continually revisit their strategic plans, viewing their strategies as anchors, not constraints, to what they can achieve. As you implement in years two, three, four, or five of your strategy, it is a good idea to repeat all of the steps described above. On an annual basis, the first two steps (Translate and Create) may take less time and effort if you are simply updating the initiatives established at the outset of your implementation process. As Sam Cobbs, executive director of First Place for Youth, explained, “Having a strategic plan and objectives that are well articulated makes the process a whole lot easier. There isn’t a lot that is up for debate. Everything we do has to lead to those objectives that were articulated in the plan.”

In 2008, Bridgespan had the opportunity to help First Place for Youth develop a new strategic plan. The organization’s mission is to help foster youth make a successful transition to self-sufficiency and responsible adulthood. The organization uses a rigorous “game-planning process,” whereby it revisits its strategic plan, sets annual goals, connects those goals to its budget, and defines individual performance objectives. The process begins in January, six months before the beginning of its fiscal year. As Cobbs said, “It sounds like its year-round planning, but it is only intensive for a couple of months; the time between mid-January and mid-April is the busiest time for us.”

### A Template to Guide Step 6: Revisiting Your Strategy and Repeating the Process

Creating a calendar to help you stay on top of this important cycle may help. This [Annual Implementation Timeline](#) is a starting point for thinking about the flow of implementation activities over the course of a year as you implement for results.

Establishing this type of annual planning cycle can help align your entire organization around core priorities. As Cobbs said of his organization’s reaction to a clear planning cycle, “There is palpable excitement about the game-planning process. This is what people are talking about, what is ringing through the halls as everyone is setting their plan for the coming year.” Unifying the organization around the strategy is particularly critical given the turnover that most organizations experience. As Cobbs explained, “There isn’t a board member [today] who was on my board when we went through the strategic planning process [three years ago]. Of my senior staff, only two were present.”

Being purposeful about implementing a new strategy is never easy, but the result is well worth the effort. Grellman of Goodwill Industries described the benefits his organization has experienced from planning for implementation, saying, “It has further fostered the integration of our strategic goals into the everyday

work across the organization, allowed us to leverage what we know now (which is far more than a year ago), forced us to look at external macro-trends and assess how they impact our strategies, and it has given us the opportunity to further sharpen our focus.”

Ultimately, focusing on implementation as much as strategy development is what helps organizations achieve better results. The improved outcomes your organization can achieve by executing its strategy well, year after year, can create a better future for the people and places you serve. When done right, effective implementation can be the difference between simply good intentions and truly great impact.

## Acknowledgements

The authors would like to thank the following people who provided input to this guide, sharing their experiences, processes, tools, and templates their organizations use to live into their plans.

- Robert Birdsell, President and CEO, Cristo Rey Network
- James Cleveland, Chief Executive Officer, Jumpstart
- Sam Cobbs, Executive Director, First Place for Youth
- Dan Daly, Executive Vice President and Director of Youth Care, Barb Vollmer, Associate Vice President of Administrative Services, and Shann McKeever, Associate Vice President of Program Fidelity, Boys Town
- Gary Grellman, Chief Financial and Operating Officer of Goodwill Industries of San Francisco and San Mateo Counties
- Peter Long, Chief Executive Officer, and Scott Travassos, Director of Finance and Operations, Blue Shield Foundation of California
- Stanley Pollack, Executive Director, Teen Empowerment
- Bob Rath, Chief Executive Officer, Our Piece of the Pie
- Mike Ruane, Executive Director, and Christina Altmayer, Consultant, Children and Families Commission of Orange County

## Glossary

### **Dashboard**

A performance evaluation tool that provides a high-level overview of the progress of key activities and initiatives towards annual objectives and strategic priorities

### **Deliverables**

The expected results or outputs from each key activity or strategic initiative

### **Initiatives**

Major efforts required to make progress toward the strategic goals

### **Intended Impact**

Specifies the social change you are trying to achieve, for whom, and over what time period

### **Interdependencies, Sequential**

Processes that rely on the deliverables from one key activity or stage of work before they can proceed

### **Interdependencies, Simultaneous**

Connections between different key activities and initiatives that require matching resources or concurrent work across different organizational units

### **Key Activities**

Major tasks to be completed in carrying out an initiative

### **Milestones**

The major events, accomplishments, deliverables, and/or decisions within each strategic initiative

### **Strategic Goals**

Multi-year objectives established and embedded in your strategic plan

### **Performance Metrics**

Empirical variables selected to provide insight into the results of activities and initiatives

### **Work Plan**

The unique set of key activities, deliverables, and milestones for an individual, program team, or organizational unit

## Implementation that Gets Results

	Step 1: Translate Strategic Goals	Step 2: Create a Blueprint	Step 3: Mobilize the Team	Step 4: Align Finances	Step 5: Monitor Progress	Step 6: Revisit and Repeat
<b>Key roles</b>	<ul style="list-style-type: none"> <li>Executive Team (e.g., CEO, ED, COO, CFO) sets overall priorities</li> <li>Initiative team leaders develop Initiative Action Plans</li> </ul>	<ul style="list-style-type: none"> <li>Implementation Lead compiles Initiative Timeline</li> <li>Management Team (e.g., Executive Team plus program and functional directors) reviews timeline</li> </ul>	<ul style="list-style-type: none"> <li>Executive Team working with Board of Directors</li> <li>Management Team sets communication priorities, leads critical internal and external communications</li> </ul>	<ul style="list-style-type: none"> <li>Management and Executive Teams set goals, review budgets</li> <li>Finance Team coordinates allocations</li> <li>Budget owners develop budgets aligned with strategy</li> </ul>	<ul style="list-style-type: none"> <li>Management and Executive Teams supervise the process</li> <li>Evaluation, performance management, or initiative leads update initiative status</li> </ul>	<ul style="list-style-type: none"> <li>Executive Team and Implementation Lead manage process of reviewing and updating annual goals, aligning organization to achieve them</li> </ul>
<b>Relevant tools</b>	<ul style="list-style-type: none"> <li><a href="#">Initiative Overview</a></li> <li><a href="#">Initiative Action Plans</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Initiative Implementation Timeline</a></li> <li><a href="#">Initiative Overview</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Communications Plan</a></li> <li><a href="#">Staff Performance Goals</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Initiative Resource Plan Template</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Management-Level Dashboard</a></li> <li><a href="#">Board-Level Dashboard</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Annual Implementation Timeline</a></li> </ul>
<b>Questions to consider</b>	<p><b>Defining initiatives:</b></p> <ul style="list-style-type: none"> <li><b>Deliverables:</b> What will be the results of the initiative?</li> <li><b>Initiative leader/ team:</b> Who is responsible and involved in the work?</li> <li><b>Key activities:</b> What will the team do to drive the initiative?</li> <li><b>Resources:</b> What investments (people, equipment, time, finances) will be needed?</li> <li><b>Interdependencies:</b> How will the initiative impact other functions or initiatives?</li> <li><b>Milestones:</b> What major events, accomplishments, or key decision points are anticipated?</li> <li><b>Performance metrics:</b> How will you gauge progress?</li> <li><b>Timeline:</b> When will the initiative begin and end?</li> </ul>	<p><b>Integrating initiatives:</b></p> <ul style="list-style-type: none"> <li>Do any initiative timelines need to be shifted due to interdependencies or pinch points? Does one initiative need to reach a milestone or finish before another can start or continue?</li> <li>Are timelines realistic considering current workloads?</li> <li>Do you have sufficient financial resources to complete the initiative?</li> <li>If planned progress is made on each individual initiative, is the organization on track to achieve the strategic priorities? Are any critical pieces or phases missing?</li> </ul>	<p><b>Communicating:</b></p> <ul style="list-style-type: none"> <li>Who are your organization's major audiences?</li> <li>What information do they need about your strategy to support implementation?</li> <li>What is the best format for reaching them?</li> <li>Who needs to deliver the message?</li> <li>When do they need information as implementation progresses?</li> </ul> <p><b>Aligning staff:</b></p> <ul style="list-style-type: none"> <li>Do staff have specific, measurable goals that support department/organizational goals?</li> <li>Are staff receiving feedback on performance related to these annual goals?</li> </ul>	<p><b>Aligning financial resources:</b></p> <ul style="list-style-type: none"> <li>Given your strategic goals, what programs should be continued, modified, or discontinued?</li> <li>Are key initiatives getting the resources they need to succeed?</li> <li>Does your overall budget reflect your strategic priorities in terms of spending across initiatives and the organization as a whole?</li> <li>If you are anticipating a tighter budget year ahead than when the plan was crafted, what principles will your management team use to make the tough calls?</li> </ul>	<p><b>At quarterly review meetings:</b></p> <ul style="list-style-type: none"> <li>Are you on/off track based on your timeline?</li> <li>If off-track, why?</li> <li>What, if any, changes have occurred that are affecting execution? How should you course correct?</li> <li>Was your timeline realistic? Do you need to update it given changing conditions?</li> <li>Do your priorities have sufficient resources?</li> </ul> <p><b>At annual review meetings:</b></p> <ul style="list-style-type: none"> <li>What important strategic issues are you facing this year?</li> <li>What changes have occurred; what are the implications for your priorities going forward?</li> <li>Given longer-term strategy, what must you achieve this year?</li> </ul>	<p><b>Setting an annual game plan:</b></p> <ul style="list-style-type: none"> <li>What opportunities have you experienced over the previous year?</li> <li>Given your longer-term strategy, what must each department/initiative team achieve this year?</li> <li>What financial resources are needed to support departmental and initiative goals?</li> <li>How should individuals' annual objectives and work plans be updated to reflect strategic priorities?</li> </ul>

# Initiative Overview Template

How to use this template	
<b>Why</b> would you use this template?	Use this template to translate your strategic priorities into detailed, 12-18-month initiatives and concisely view their high-level characteristics, resources required, and timelines
<b>When</b> would you use this template?	When you are translating strategic goals into actionable initiatives

Strategic Priority	Initiative	Outcomes	Lead	Team members	Resources required	Interdependencies	Start date	End date
<i>List priorities from strategic plan</i>	<i>Define major initiatives (may be multiple for each strategic priority)</i>	<i>List the anticipated outcomes for each initiative</i>	<i>Designate person who will own initiative</i>	<i>List names of people who are responsible for driving the initiative forward</i>	<i>Briefly explain financial and other resources needed to implement initiative</i>	<i>Explain dependencies on organizational support functions (i.e., HR, IT, finance, other) or other initiatives</i>	<i>Estimate general timeline for the project (Quarter/Month)/YYYY</i>	
<b>Strategic Priority 1</b>  <i>EXAMPLE: Grow to scale with programs in selected high priority states</i>	1.1 EXAMPLE: Assess and segment sites into four categories	<ul style="list-style-type: none"> <li>Each state is placed into four categories</li> <li>Decision made on which sites to exit; and these sites are exited</li> </ul>	<ul style="list-style-type: none"> <li>George W</li> </ul>	<ul style="list-style-type: none"> <li>Sally O</li> <li>Billy C</li> <li>Hillary J</li> <li>Danny K</li> </ul>	<ul style="list-style-type: none"> <li>New IT system: \$TBD</li> <li>Full-time manager</li> <li>Staff support at sites</li> <li>Time spent on planning and implementation</li> <li>Additional resources for high-priority sites</li> </ul>	<ul style="list-style-type: none"> <li>Human Resources to realign site staff</li> <li>IT to implement new performance management system</li> <li>Finance to shift resources and budgets</li> <li>Communications to announce developments</li> </ul>	Q1 2011	Q2 2011
	1.2 EXAMPLE: Assemble support teams and prepare supports for each category	<ul style="list-style-type: none"> <li>Support teams are established</li> </ul>	<ul style="list-style-type: none"> <li>Sally O</li> <li>Hillary J</li> </ul>	<ul style="list-style-type: none"> <li>Jenny C</li> <li>Mark N</li> <li>Michelle K</li> <li>Kirk W</li> </ul>			Q1 2011	Q3 2011
	1.3 EXAMPLE: Engage in long-term strategic planning with high priority sites	<ul style="list-style-type: none"> <li>First long-term strategic plan is complete</li> </ul>	<ul style="list-style-type: none"> <li>Billy C</li> <li>Danny K</li> </ul>	<ul style="list-style-type: none"> <li>Katie G</li> <li>Duncan A</li> <li>Lucas P</li> <li>Mark D</li> </ul>			Q2 2011	Q2 2012
<b>Strategic Priority 2</b>	2.1							
	2.2							
<b>Strategic Priority 3</b>	3							



# Initiative Action Plan Template

How to use this template	
<b>Why</b> would you use this template?	For each initiative, use this action plan template to describe the context for the initiative, assign staff roles, and estimate anticipated outcomes, milestones, resources required, and interdependencies with other departments/functions
<b>When</b> would you use this template?	After strategic priorities have been translated into initiatives, as you detail what each initiative will entail

**Initiative #: Name of Initiative Here**

**1. Related Strategic Priority**

Select the organizational priority or priorities that this initiative will help to achieve

- SP #:
- SP #:
- SP #:

**2. Initiative Context and Expected Results**

Describe the project, why it was developed, expected results, and how its success will be assessed.

**3. Team**

<b>Initiative lead:</b>	Name, Title, Department/Region
<b>Team members:</b>	Name, Title, Department/Region Name, Title, Department/Region Name, Title, Department/Region
<b>Proposed start date:</b>	MM/DD/YY
<b>Proposed end date:</b>	MM/DD/YY

**4. Resources Required**

<b>Financial and other resource implications:</b>	Describe additional hires or other major costs associated with implementing initiative
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**5. Initiative Work Plans and Interdependencies**

Objectives	Outcomes	Lead	Due Date / Milestones	Interdependencies
List by objectives for initiative in chronological order of estimated completion	List the expected outcomes for each objective	Designate the person who will own initiative	MM/YYYY	List requirements from departments/ functions within the organization (i.e., fundraising, training, HR, evaluation, etc.) needed to achieve each objective

# Initiative Implementation Timeline

How to use this template	
<b>Why</b> would you use this template?	Use this template to integrate your initiatives together over time, noting key activities, milestones, and interdependencies with other initiatives and other departments/functions
<b>When</b> would you use this template?	When you are developing an integrated picture of initiatives' timelines and interdependencies

■	Key Activity
X	Milestones

Initiative	Objective	Key Activities and Outcomes	Lead / Team	Q1		Q2		Q3			Q4			FY				Interdependencies									
				J	F	M	A	M	J	J	A	S	O	N	D	Q1	Q2		Q3	Q4							
<b>1) List each initiative from Step 1 planning here</b>																											
<i>1.1 Describe a specific objective of the initiative</i>		<i>List from action plan</i>																									
List key activities sequentially here <b>Mark deadlines, deliverables, and decisions with milestones</b>																											
<i>1.2 EXAMPLE: Prepare supports for each high priority site</i>		<i>Sally O / Hillary J</i>																									
Identify the supports that will be required by each site Define the specific capabilities needed by each team Select teams <b>Support teams are established</b> Clearly define support process for each category of site Prepare any tools, frameworks, etc. to be used in planning/support Refine and improve the support/planning process based on experience		Sally O Hillary J Sally O / Hillary J Sally O Hillary J Hillary J																									
<i>1.3</i>																											

# Communications Plan Template

How to use this template	
<b>Why</b> would you use this template?	Use this template to identify key audiences who need to be aware of your strategic and implementation plan, and define the tools, formats, timelines, and content for each
<b>When</b> would you use this template?	When you are preparing for the launch of your strategic or annual plan and to manage ongoing communications

Intended Audience	Communications process				Content to be covered		
	Communications tool	Date	Format	Lead	Initiative 1	Initiative 2	Initiative 3
<b>Board of Directors</b>	<i>List type of communications tool (e.g., meeting, email, forum, etc).</i>	<i>MM/YYYY</i>	<i>Describe form and venue of delivery</i>	<i>Designate leader for each tool</i>	<i>List issues to be covered within each related initiative</i>		
<b>Executive Team</b> (i.e., CEO/ED, CFO, COO)							
<b>Management Team</b> (i.e., Executive Team plus program/functional directors)	<i>EXAMPLE: Meeting of 100 managers, presentation by CEO</i>	<i>June 2011</i>	<i>In-person presentation</i>	<i>CEO</i>	<i>Review outcomes and objectives</i>		
<b>All Staff</b>	<i>EXAMPLE: Emailed video and presentation to all staff</i>	<i>May 2011</i>	<i>Video</i>	<i>CEO, COO, and Chairman</i>	<i>Launch strategy</i>		
	<i>EXAMPLE: Managers to hold sessions</i>	<i>July 2011</i>	<i>In-person discussion</i>	<i>Division heads</i>	<i>Detailed work planning</i>		
	<i>EXAMPLE: Monthly newsletter with stories on progress</i>	<i>Monthly, starting July 2011</i>	<i>Email</i>	<i>COO</i>	<i>Monitoring, performance measurement, and recognition of progress</i>		
<b>External Community</b>							

## Individual Strategic Objectives

How to use this template	
<b>Why</b> would you use this template?	Give this template to individual staff members to create their own annual work plans, outlining their contributions to different initiatives, listing key activities, and staff interdependencies
<b>When</b> would you use this template?	When you are setting annual goals for individuals and in staff performance reviews

Name	
Position	
Department	

Strategic Priority	Initiative	Key Activities	Annual Objective	By When	Team
SP #	<i>Insert name of initiative</i>	<i>Briefly explain your role in carrying out each initiative or strategic priority, where applicable</i>	<i>Define individual's goal related to the initiative or strategic priority</i>	<i>Indicate date or quarter in which the objective should be completed</i>	<i>Indicate team members who are working with you to complete the activity</i>
Strategic Priority 1	1.1				
	1.2				
	1.3				
Strategic Priority 2	2.1				
	2.2				
Strategic Priority 3	3.1				
	3.2				
	3.3				
	3.4				

# Initiative Resource Planning Template

How to use this template	
<b>Why</b> would you use this template?	Use this template to estimate the true cost of each initiative through listing the related capital expenditures, startup/ ongoing costs, and potential savings
<b>When</b> would you use this template?	As you are preparing for your annual budgeting process

**Initiative #: Name of Initiative Here**

1. Capital Expenditures (CapEx)			
Line Item	Estimated Cost	Purchase Period	Notes/Description
List all capital expenditures (e.g., fixed assets that depreciate over time)		Estimate when costs will be incurred (MM/YYYY)	Add any additional notes here
<b>Subtotal: Capital Expenditures</b>	\$ -		

2. Startup Costs			
Line Item	Estimated Cost	Timing	Notes/Description
List all startup costs (e.g., one-time or time-limited costs related to beginning the initiative, like hiring consultants, etc.)		Estimate when costs will be incurred (MM/YYYY)	Add any additional notes here
<b>Subtotal: Startup Costs</b>	\$ -		

<b>Total CapEx and Startup Costs:</b>	\$ -		
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3. Ongoing Costs			
Line Item	Estimated Cost	Begin Date	Notes/Description
List all ongoing costs that continue over the course of completing the initiative (e.g., staff costs); assumes cost will be annually occurring after begin date		Estimate when costs are due to begin (MM/YYYY)	Add any additional notes here
<b>Subtotal: Ongoing Costs</b>	\$ -		

4. Estimated Savings			
Line Item	Estimated Savings	Savings Period	Notes/Description
List any estimated savings that may be accrued through increased revenue (e.g., higher ticket sales) or reduced costs (e.g., less staff); may include one-time or ongoing savings		Estimate when savings are due to begin and end (MM/YYYY)	Add any additional notes here
<b>Subtotal: Estimated savings</b>	\$ -		

<b>Total Annual Operating Cost (less Savings):</b>	\$ -		
--	------	--	--

## Management-Level Performance Dashboard

How to use this template	
<b>Why</b> would you use this template?	Use this template with your management team to assess progress on the outcomes and targets set during Steps 1 and 2 to achieve your organization's initiatives
<b>When</b> would you use this template?	At your monthly program , operational, and quarterly reviews

Strategic Priority	Initiative	Outcomes	Lead	Annual Target	Actual Progress	Status
	List initiatives from Step 1	List the expected outcomes for each initiative from Step 1	List initiative owner here	Include target goal set during planning progress	Include most recent status on initiative	Code in color
Strategic Priority 1	1.1 EXAMPLE: Assess and segment sites into four broad categories	• Each state is placed into one of four categories	• George W	• All sites completed by Q2 2011	• Completed by Feb 2011	Green
		• Decision made on which sites to exit	• George W	• Closure sites determined by Q3 2011	• In negotiation about potential closure sites	Light Green
	1.2 EXAMPLE: Assemble support teams and prepare supports for each category	• Support teams are established	• Sally O • Hillary J	• Four support teams set up by Q3 2011	• Three of four support teams established • Working on plan for serving struggling sites	Yellow
	1.3 EXAMPLE: Engage in long-term strategic planning with high priority sites	• First long-term strategic plan is complete	• Billy C • Danny K	• Finalized strategic plans completed by Q2 2012	• One plan finished, all other plans 50% completed	Orange
Strategic Priority 2						
Strategic Priority 3						

## Board-Level Performance Dashboard

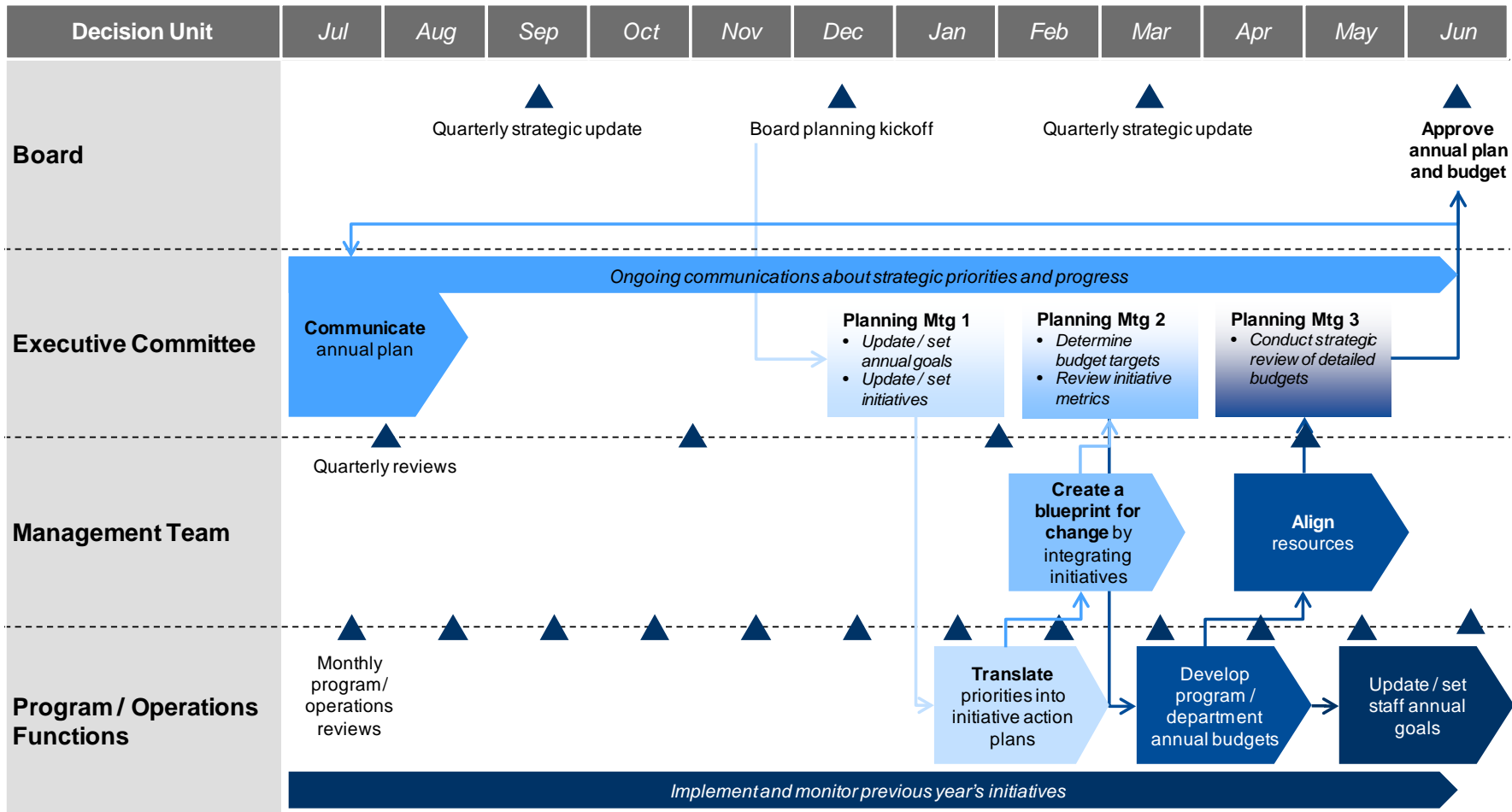
How to use this template	
<b>Why</b> would you use this template?	Use this template with your board to assess progress and potential next steps on the high-level milestones for each initiative
<b>When</b> would you use this template?	At board meetings, including quarterly and annual reviews of strategy and implementation

Strategic Priority	Status	Initiative Milestones	Lead	Proposed Next Steps
<b>Strategic Priority #</b>				
<i>List strategic priority here</i>	On Track	List initiatives and their accompanying metrics from Steps 1 and 2 here	List initiative owner here	Propose appropriate next steps for the Board to discuss and approve
	Needs Attention			
	Off Track			
<b>Strategic Priority 1</b>				
<i>EXAMPLE: Grow to scale with programs in selected high priority states</i>	On Track	1.1 <i>EXAMPLE: Assess and segment sites into four categories by Q2; identify which sites to exit by Q3</i>	• George W	• Finish determining compensation packages and sales for closed sides
	Needs Attention	1.2 <i>EXAMPLE: Assemble support teams and prepare supports for each broad category by Q3 2011</i>	• Sally O • Hillary J	• Determine approach and resources required to improve struggling sites
	Off Track	1.3 <i>EXAMPLE: Engage in long-term strategic planning with high priority sites by Q2 2011</i>	• Billy C • Danny K	• Hire consultant to assist with unfinished strategic plans
<b>Strategic Priority 2</b>				
	On Track			
	Needs Attention			
	Off Track			
<b>Strategic Priority 3</b>				
	On Track			
	Needs Attention			
	Off Track			

Step 6: Revisit and Repeat

Annual Implementation Timeline

- Step 1: Translate goals into initiatives
- Step 2: Create a blueprint for change
- Step 3: Mobilize your team
- Step 4: Align finances
- Step 5: Monitor progress



Note: Timeline assumes July-June fiscal year