

Building an Actionable Work Plan

Sharon K. Barker, CFRE

VP & COO

Housing & Community Development Network of New Jersey

Strategic Plan

- ▶ A strategic plan defines what an organization should do within the near (one to five year) future, why and how.
- ▶ Strategic planning assumes nonprofit organizations operate in a constantly changing environment that must be monitored and adjusted to in terms of strategic directions and activities

Strategic Planning Methods

- ▶ Plan to Plan - typically the CEO takes the lead in preparing the organization for strategic planning
- ▶ Determine if you are handling this internally or hiring a consultant
- ▶ Undertake SWOT analysis (whether individually or as a group) with both board and staff. May include outside groups
- ▶ Review the Mission & Vision
- ▶ Generate strategies, goals, and objectives (make sure they are in line with the mission)
- ▶ Monitor the plan - Identify specific outputs and outcomes that can be used to show progress

Work Plan OR Operational Plan

- ▶ Also known as an action plan converts the strategic goals and objectives in a strategic plan into annual plans
- ▶ An operational or work plan incorporates the strategic goals and their related objectives and strategies
- ▶ Identifies specific action steps:
 - ▶ With timeline
 - ▶ Budget requirements
 - ▶ Responsible people
 - ▶ Evaluation process

Creating S.M.A.R.T. Goals

- ▶ **S**pecific
- ▶ **M**easurable
- ▶ **A**ttainable
- ▶ **R**ealistic
- ▶ **T**imely

SPECIFIC: A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the six “W” questions:

- ▶ Who: Who is involved?
- ▶ What: What do I want to accomplish?
- ▶ Where: Identify a location
- ▶ When: Establish a time frame
- ▶ Which: Identify requirements and constraints
- ▶ Why: Specific reasons, purpose or benefits of accomplishing the goal
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- ▶ EXAMPLE: A general goal would be, “Get in space.” But, a specific goal would be, “Join a health club and workout 3 days a week.”

MEASURABLE:

Establish concrete criteria for measuring progress toward the attainment of each goal you set.

- ▶ When you measure your progress you:
 - ▶ Stay on track
 - ▶ Reach your target dates
 - ▶ Experience achievement

- ▶ To determine if your goal is measurable, ask question like:
 - ▶ How much?
 - ▶ How many?
 - ▶ What difference will it make?
 - ▶ How will I know when it is accomplished?

ATTAINABLE: When you identify goals that are most important to you, you begin to figure out ways you can make them come true.

- ▶ You develop the attitudes, abilities, skills and financial capacity to reach them
- ▶ You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals
- ▶ You can attain most any goal you set when you plan your steps wisely and establish a time frame that allows you to carry out those steps
- ▶ Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because your goals shrink, but because you grow to match them

REALISTIC: To be realistic, a goal must represent an objective toward which you are both willing and able to work.

- ▶ A goal can be both high and realistic
- ▶ Use data from previous projects to determine goal
- ▶ Be sure every goal represents substantial progress
- ▶ A high goal is frequently easier to reach than a low one
- ▶ Some of the hardest jobs you ever accomplished actually seem easier simply because they were a labor of love

TIMELY: A goal should be grounded within a timeframe

- ▶ You need a timeframe or there is no sense of urgency
- ▶ Your goal is probably realistic if you truly believe that it can be accomplished
- ▶ Ask yourself what conditions need to exist to accomplish this goal

Using Your Plan

- ▶ Strategic Plan should be a living and constantly updated document
- ▶ Strategic Action Plans should be part of staff work plans
- ▶ Staff Meetings or department/team meetings should include report out on activities and progress
- ▶ Include Strategic Plan Reporting as part of each Board Meeting Agenda

Tools You Can Use

- ▶ Review Handouts:
 - ▶ Outlook Tasks
 - ▶ Workplan with Activities
 - ▶ Action Plan Grid
 - ▶ Strategic Plan Update at Board Meetings



Presented by: Sharon K Barker

Phone: 609-393-3752 x 1400

E-mail: sbarker@hcdnnj.org

www.hcdnnj.org