Building an Actionable Work Plan

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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

- Specific
- Measurable
- Attainable
- Realistic
- Timely
SPECIFIC: A specific goal has a much greater change 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

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