



May Dugan Center
Strategic Plan 2014-2016
Executive Summary

Facilitated by Patricia Egan, Beyond Fundraising LLC

Executive Summary

In April 2013, the Board of Directors, administration, and staff embarked on a strategic planning process in an effort to clearly define the future of the organization. A comprehensive evaluation of the environment, competition, and clients was performed. Focus groups, surveys, and interviews provided further insight into the organization and needs for the future.

Board involvement included two retreats, program committee activities, and plan refinement. Staff attended several workshops focused on the planning activities, further defining goals, strategic initiatives, and tasks necessary for goal achievement. All in all, stakeholders were involved in a variety of activities in an effort to develop a plan that was comprehensive, inclusive, and achievable.

The balanced scorecard was chosen as the method to define, refine, and track goals. It is the intent of all parties to create a plan that was living...meaning that it would be reviewed with regularity, become an agenda item for board meetings, and have a mechanism to call out areas that need increased attention. Staff is charged with completing tasks on a timely basis, for reporting to the board, and for identifying areas of concern. Staff will also be evaluated individually on their performance to goals. Thus, board and staff are collaboratively accountable for goal achievement.

Goals are as follows:

Internal:

- Recruit/retain professional and competent staff to meet organizational capacity
- Ensure appropriate and engaged governance
- Provide effective and efficient infrastructure to support the organization
- Develop internal and external communication plans
- Ensure compliance with all regulatory entities

Financial:

- Maintain effective, timely, and transparent budgeting and analysis
- Define revenue opportunities

Growth:

- Leverage tracking systems
- Evaluate program potentials

Customer:

- Measure and improve satisfaction
- Engage in Continuous Quality Improvement
- Educate community about current and future services

Each quadrant's goals have specific strategic initiatives with benchmarks, tactics, and timelines for three years, 2014, 2015, and 2016. Specific reporting requirements are outlined in the plan and involve board participation, both with full board and executive committee oversight.

To keep the document alive, an annual review is required by the board at their retreat, with the task to evaluate the current year, make adjustments for the upcoming year, and add a third year. In this way, the document will remain relevant and focused on current and future organizational needs and goals.

Strategic plans can only remain relevant when they have mechanisms that require specific actions, goals, and reviews. The plan developed over a one-year period of time certainly involves these elements, and demonstrates the dedication and commitment of the board and staff working together to achieve the goals identified in the plan.