



**May Dugan Center
Strategic Plan
Executive Summary**

Strategic Plan Overview

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.

For the initial iteration of the plan, 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.

Each quadrant's goals have specific strategic initiatives with benchmarks, tactics, and timelines for three years. 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 an additional 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 initially 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.

Strategic Plan Goals

The initial plan was approved in July of 2014 with goals and strategic initiatives for 2014-2016. In February of 2016, and March of 2017, the Board and Staff updated the plan through 2019. The goals of this process was to look the initial goals and strategic initiatives and the progress, validate the goals that are still relevant, and to identify new goals and initiatives for the Center to focus on for the next three years. The process was started with a Board and Staff retreat and followed by discussion at the committee meetings. The updated plan was approved in July of

2017. The annual Board and staff retreat is held every Winter/Spring; for the 2018 retreat, the source material (surveys, focus groups, SWOT analyses, etc...) will be redone and incorporated into the 2018-2020 plan.

The following are the goals that were validated and updated for 2017-2019:

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
- Capital Campaign

Financial:

- Maintain effective, timely, and transparent budgeting and analysis
- Expand revenue and funding opportunities
- Sound Capital Campaign financial management

Growth:

- Leverage tracking systems
- Evaluate program potentials
- Establish future needs (capital campaign)

Customer:

- Measure and improve satisfaction
- Engage in Continuous Quality Improvement
- Educate and reach out to increase knowledge of services
- Ensure and support programs and operations during Capital Campaign