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NONPROFIT MANAGEMENT FOR PET RESCUE ORGANIZATIONS

Part Three: Strategic Planning

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and other nonprofit
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In this section:

- ◉ Why strategic planning?
- ◉ Mission and goals
- ◉ Developing measurable objectives
- ◉ Work plans and action steps
- ◉ Continuous improvement



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Why does a pet rescue organization need a strategic plan?

- ◉ Serves as a road map to keep you focused on your goals.
- ◉ Tells your community why you exist and what you intend to accomplish.
- ◉ Provides ways for you to measure your performance so that you can determine whether your strategies are working.



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Your strategic plan serves four purposes:

- To manage the wide range of activities that must take place in order to achieve your goals
- To develop a time table and budget for those activities
- To explain the organization's purpose and activities to the public
- To help ensure—in quantifiable terms - your pet rescue program's successes



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Without a written plan...

- Your Board will tend to bounce from one unrelated project to the next, just to be doing something.
- You will have no real way of knowing if your program is effective, because you did not define what success would look like or how it would be measured.
- It will be very hard to persuade donors and funders that your program is worth investing in. More and more, grantors are looking for evidence that funding applicants have a rational and well-founded strategic plan.



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Key tasks in strategic planning

- Review your vision and mission
- Establish goals by area or function. Ensure that goals speak directly to your mission.
- Define more specific objectives to achieve goals. Objectives should include evaluation measures.
- Develop action steps, including timelines and responsibility assignments
- Ongoing performance measurement and annual evaluation/plan update



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Your mission statement:

- Should be clear, concise, and short enough to memorize
- Should tell your community and your stakeholders why you exist
- All current and future goals and objectives will be aligned with your mission.
- All board and staff members should be able to articulate and discuss the mission statement.
- It is extremely rare for an organization's mission statement to change.



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Organization Goals

- Goals are more specific statements of purpose, which can form the basis for your committees.
- Goals should speak directly to your mission statement. It should be evident that achievement of each goal will lead logically to the achievement of your mission.
- Like the mission statement, goals change very rarely during the course of an organization's lifetime.



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Mission and Goal Examples

Here's an example of a mission statement:

ABC Pet Rescue's mission is to work with our community partners to provide an adoption guarantee to all healthy and treatable pets in Jones County in order to achieve our vision of a no-kill county by 2015.



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Mission and Goal Examples

And here are some goals that would support that mission:

- ◉ To decrease euthanasia at Jones County Animal Control by transferring healthy and treatable pets from the shelter and finding them permanent, loving adoptive homes.
- ◉ To recruit and retain enough committed volunteers to implement special projects and meet ongoing operational needs.
- ◉ To achieve ongoing financial stability for ABC Pet Rescue with a diverse base of donors, funders and income-producing activities.



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Connecting your mission and goals to community needs

- When formulating and reviewing your mission and goals, it's crucial to review your Community Needs Assessment data. (See Part One of this series for information on how to conduct a Community Needs Assessment.)
- You will maximize your community support, both in terms of funding and volunteers, when you can show that your goals are addressing documented needs in your community. There should be a logical flow between needs, mission and goals.



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Objectives

- Once you've determined what community needs will be addressed within the scope of your mission and goals, it's time to set objectives.
- Objectives are specific statements of how a goal will be achieved.
- Objectives should be measurable and time-defined.
- Objectives should directly relate to the community's identified needs.



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Examples of Objectives

- We will complete a minimum of 600 total pet adoptions by December 31, 2008.
- We will provide a minimum of six training opportunities for Board members during the 2008-2009 fiscal year.
- We will recruit and retain a core group of 50 regular volunteers who will each donate an average of 5 hours per month during 2008.
- We will implement a schedule of monthly fundraising events that will raise a minimum of \$20,000 by December 31, 2008.



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Objectives must be measurable!

- If you don't include evaluation measures in your objectives, how will you know you've achieved them?
- Including metrics provides an objective way to prove to your community and funders that you are effective.
- Deadlines are crucial to ensure that committees understand their work schedules.
- For example, the objective: "We will include more children's activities at our adoption events" is not measurable or meaningful, and there is no timeframe for completion.



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Focus on your objectives!

- ◉ Establish your year's objectives during strategic planning at the beginning of the year, and then stick to your plan.
- ◉ Think very carefully before adding projects in mid-year: Does this project directly address your year's objectives? Is there any reason the project has to be added immediately, rather than put on the list for consideration in next year's plan?



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Strategies & Action Plans

- Now comes the fun part: designing the activities (strategies) that will achieve your objectives!
- ⦿ Break objectives down into workable action steps and timelines, and identify who will have lead responsibility for ensuring that the step is completed on time.
 - ⦿ Include all necessary preparation and follow-up when developing action plans.
 - ⦿ Action plans should be developed by the committee that will implement them, then submitted to the Board for inclusion in the year's Work Plan.



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Action Plan Example

Here's an example of the linkage between goal, objective and action plan:

- ◉ Goal: To improve and maintain community awareness of the plight of homeless pets and ABC Pet Rescue's mission to save them.
- ◉ Objective: By May 31, 2008, we will begin distribution of a quarterly ABC Pet Rescue newsletter



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Action steps to achieve objective:

Note: this sample plan envisions an all-volunteer organization. These activities could also be assigned to staff in a larger organization.

Activity	Responsibility	Timeline
Compile email and mailing lists for newsletter distribution. Continue to add to and update this list as new contacts are developed.	Teela Brown, Board Outreach Committee	3/30 and ongoing
Estimate needed press run and research printing costs (copy machine vs. print shop).	Louis Wu, Newsletter Editor (Board Volunteer)	By 4/15
Gather June issue content: introductory article, Animal Control statistics, Volunteer Spotlight, Wish List, event calendar, etc.	Louis Wu, Newsletter Editor Newsletter Committee	By 5/5
Complete June newsletter layout in Microsoft Publisher.	Newsletter Committee	By 5/15



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Action steps to achieve objective:

Activity	Responsibility	Timeline
Post newsletter on ABC Pet Rescue's website and distribute electronically to email list.	Louis Wu, Newsletter Editor	By 5/25
Get hard copies of newsletter printed.	Louis Wu, Newsletter Editor	By 5/25
Distribute hard copies of newsletter to mailing list and around town.	Newsletter Committee	By 5/31
After the first issue is distributed, plan for issues quarterly at the beginning of September, December and March.	Newsletter Committee	By 6/30
Periodically review and improve newsletter format.	Newsletter Committee	ongoing



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Continuous Improvement: Evaluation & Assessment

- It is the Board's responsibility to periodically evaluate the organization's performance.
- Performance assessment should be aligned with the goals and objectives articulated in the strategic plan.
- The annual evaluation can take place at an Strategic Planning Committee meeting, full Board meeting or at a special evaluation workshop. The important thing is to schedule it annually!



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Continuous Improvement: Evaluation & Assessment

- Look at last year's plan. Were the objectives achieved? Did those achievements result in attainment of the anticipated goals? If not, why not?
- Were there any unanticipated successes or challenges during the year? Analyze these events as well.
- Gather statistics from your evaluation process to use in your annual report and other program materials.



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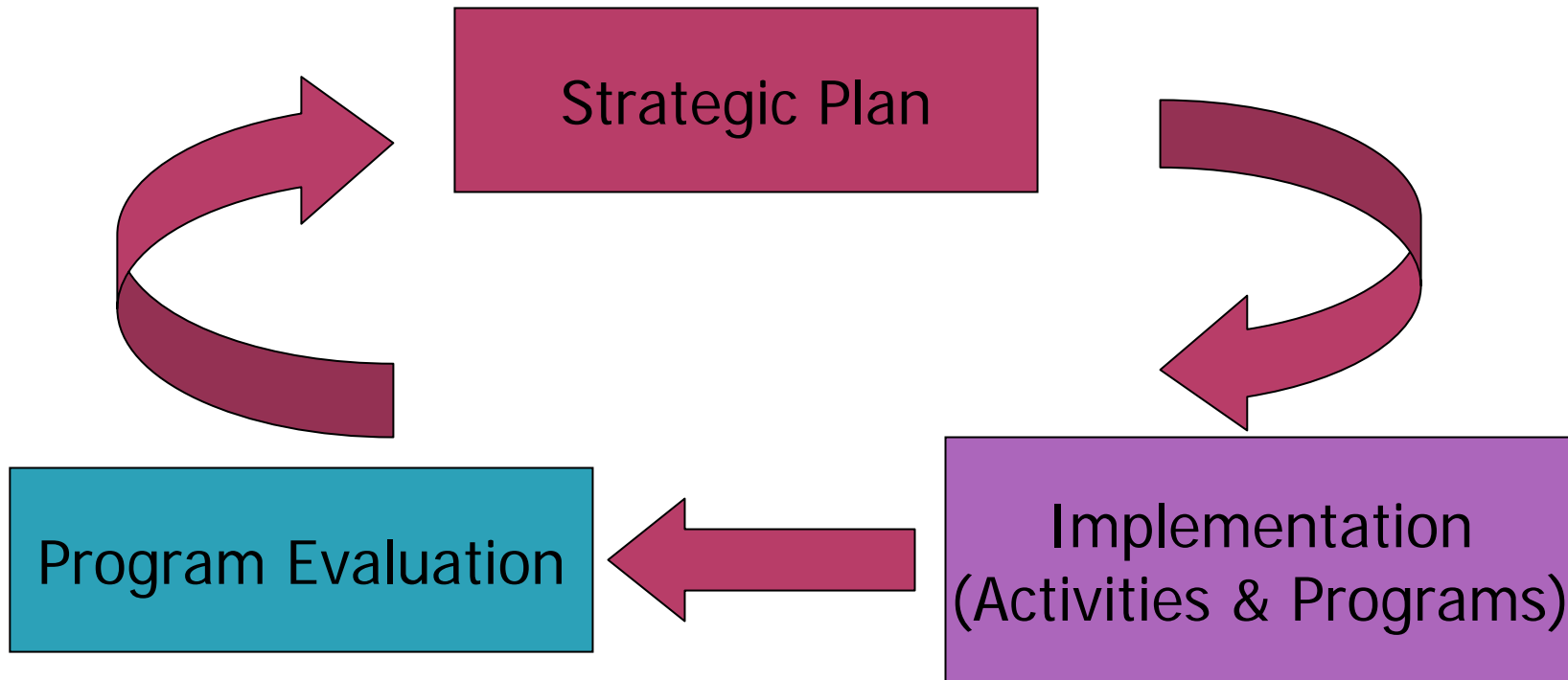
Continuous Improvement: Evaluation & Assessment

- The results of your annual program evaluation will be the starting point for the next year's strategic plan.
- Update your objectives and strategies, add new ones and discard those that have been achieved or are no longer relevant.
- The evaluation process should also be used to assess the effectiveness of events and programs during the year on an ongoing basis.



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The annual planning & evaluation cycle





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What's next?

In Parts Four through Eight of this Nonprofit Management Series you can learn about:

- ◉ **Fiscal Oversight/Fundraising**
- ◉ **Community Awareness/Public Relations**
- ◉ **Human Resources: Staff and Volunteers**
- ◉ **Assessment and Evaluation**
- ◉ **Administrative Tasks/Meeting Management**



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Questions or Comments?

For more information about these topics:

**Download the complete
Nonprofit Management series at
www.maddiesfund.org**

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