



## SPiN: Strategic Planning in Nonprofits

### Sample Monitoring Plan

This was included as a part of an organization's strategic plan, documenting their intention to reference the plan and track their progress during the coming years. Remember to lay out a monitoring plan that is appropriate to your organization's size and stage of development.

#### *Monitoring Our Progress*

The board is committed to monitoring progress toward these goals by reviewing the plan regularly.

- The management staff will develop annual goals each year in January that move the organization toward accomplishment of the outcomes set forth in the plan.
- The board's annual goals will be set to align with the strategic plan.
- Leadership from management staff and the board will report on progress made toward plan annual goals on a quarterly basis, using a dashboard format where the status of each initiative is clearly indicated.
- Full reports will take place in January and July, with targeted discussion, problem-solving and mid-course corrections for specific items of concern taking place in April and October.

Currently, the plan has a five-year timeframe. At the midway point of the plan, the board will discuss whether the plan remains useful to the organization. If circumstances indicate that it would be valuable, a decision may be made to undertake strategic planning at the three-year point rather than waiting until year five.

The plan is intended as a flexible roadmap that sets direction but should not unduly limit the agency's ability to seize new opportunities or respond to emergent community issues.