



Strategic Planning Tools and Communication

1. Strategic Planning Systems “champion”

Tawonga has nominated one staff person to be responsible for tracking of strategic planning progress and updates.

2. Outlook Tracking

Tawonga used the Excel document provided by Grinspoon to import our strategic plan into MS Outlook. This way, we keep our plan “off the shelf” using multiple tools.

The screenshot shows the Microsoft Outlook Tasks window. The left sidebar contains a 'Current View' section with several view options, including 'Strategic Plan' which is selected. The main pane displays a list of tasks grouped by categories and due dates. The task list includes:

Subject	Status	Due Date	% Complete	Categories
Categories: SP: Education & Program (36 items)				
Categories: SP: Engagement & Community Service (31 items)				
Categories: SP: Environment & Sustainability (45 items)				
Categories: SP: Fundraising & Dev. (21 items)				
Due Date: December 31, 2013 (1 item)				
Create \$4 Million endowment for scholarships	Deferred	Tue 12/31/2013	0%	SP: Fundraising & D...
Due Date: February 26, 2010 (8 items)				
Cultivate and request support from identified sources (indi...	In Progress	Fri 2/26/2010	0%	SP: Fundraising & D...
Update donor database to ensure correct information, rec...	In Progress	Fri 2/26/2010	0%	SP: Fundraising & D...
Creation of a Leadership Circle	In Progress	Fri 2/26/2010	0%	SP: Fundraising & D...
Creation of collateral materials (case statement, brochures...	Not Started	Fri 2/26/2010	0%	SP: Fundraising & D...
Other campaigns (i.e. endowment, Legacy)	In Progress	Fri 2/26/2010	0%	SP: Fundraising & D...
Donor recognition and stewardship policies	Not Started	Fri 2/26/2010	0%	SP: Fundraising & D...
Annual Campaign	Not Started	Fri 2/26/2010	0%	SP: Fundraising & D...
Establish goals, tactics and potential actions for Tawonga F...	Not Started	Fri 2/26/2010	0%	SP: Fundraising & D...
Due Date: January 29, 2010 (1 item)				
Train Development Director for Tawonga work; begin cultiv...	In Progress	Fri 1/29/2010	0%	SP: Fundraising & D...
Due Date: May 29, 2009 (2 items)				
Make requests, secure gifts	In Progress	Fri 5/29/2009	0%	SP: Fundraising & D...
Cultivate donors during camp visits and personal c...	In Progress	Due Date: May 29, 2009 (2 items)	0%	SP: Fundraising & D...
Due Date: February 01, 2009 (1 item)				
Identify major donors from past supporters	Completed	Sun 2/1/2009	100%	SP: Fundraising & D...
Due Date: January 30, 2009 (1 item)				
Convene Development Committee & stakeholders for strat...	In Progress	Fri 1/30/2009	0%	SP: Fundraising & D...
Due Date: January 01, 2009 (1 item)				
Steward donors; submit paperwork to GLP	Completed	Thu 1/1/2009	100%	SP: Fundraising & D...
Due Date: December 01, 2008 (1 item)				
Interview; hire most-qualified candidate	Completed	Mon 12/1/2008	100%	SP: Fundraising & D...

- View:** We’ve created separate views for only strategic planning related tasks. The main view (above) is a task list, but strategic planning can also be viewed in calendar or timeline format.
- Categories:** Each area of our strategic plan has its own category, so that our fundraising efforts, for example, can be viewed separately from our marketing & outreach (engagement) efforts.

Donor recognition and stewardship policies - Task

File Edit View Insert Format Tools Actions Help

Save and Close Recurrence... Assign Task

Arial 10

Task Details

Subject: Donor recognition and stewardship policies

Due date: Fri 2/26/2010 Status: Not Started

Start date: None Priority: Normal % Complete: 0%

Reminder: Fri 2/26/2010 8:00 AM Owner: Mimi Gordon

Substantially increase the fundraising capacity of Camp Tawonga
 Create 3-Year Fundraising Plan
 CH: Development Committee, ED, Board President
 MI: MT, EC
 Ally: MT, EC

Contacts... Adam Weisberg Categories... SP: Fundraising & Dev. Private

- c. **Contacts:** Each action item has an owner, or champion, connected to it, identifying the task's champion, and allowing parts of the plan to be "assigned" appropriately.
 - d. **Status and % Complete:** Through these fields, we can update our plan appropriately as timing changes.
3. Communication planning
- At normally scheduled agency meetings, we discuss or report on the status of the strategic plan as necessary.
- a. Staff meetings
 - b. Management Team meetings
 - c. Board meetings