

Chapter:	Governance and General Administration		
Title:	Strategic Plan Monitoring and Reporting		
Policy: <input type="checkbox"/>	Review Cycle: Triennial	Adopted Date: 11.2022	Related Policies: Strategic Planning
Procedure: <input checked="" type="checkbox"/>	Author: Prog Eval	Review Date:	

Purpose:

The procedure provides step-by-step instruction for updating Hopeful Horizons’ (HH) Strategic Plan Management Report, which informs creation of the Board’s Dashboard Report, a bimonthly report of strategic plan progress.


Scope:

This policy applies to

- All HH Staff Selected HH Staff, as specified: Leadership Team and Strategic Plan
- HH Board Members HH Volunteers Designated Reporters
- Other: Sub-contract Providers


Procedure:

- I. Pre-Planning: The planning process shall commence with a review of prior plan accomplishments, a scan of the current internal and external environments, and assessment of key stakeholder input. The environmental scan shall be prepared for the Board at least triennially to inform strategic plan updates.
- II. Planning Elements: At a minimum, HHs’ strategic planning process shall include the following:
 - Review of the organizations mission, vision and core values
 - Prioritized goals, objectives, and implementation requirements (timing, resources, etc.)
 - An assessment of current resources necessary to achieve the plan.
- III. Approval: The strategic plan is informed by a broad assessment of stakeholder input and is approved by the Board of Directors at least triennially. Approval of the plan may include affirmation of the mission, visions, and core values if they are unchanged.
- IV. Plan Monitoring:
 - A. Management Report: The Leadership team and designated staff are responsible for routine and ongoing monitoring of plan progress through regular completion of a Management Report - 2022-2025 Strategic Plan.

 Strategic Planning Area							
% Complet	Strategic Priorities	Start	Finish	Responsible Staff	Notes	Results/Status/Action	
0%	Overarching Goal	0/0/2022	0/0/2022	Lead: Name	Clarifying information	Narrative description of progress, barriers, next steps or action required, morification to	
0%	Objective	0/0/2022	0/0/2022	Name			
0%	Objective	0/0/2022	0/0/2022	Name			
0%	Objective	0/0/2022	0/0/2022	Name			
0%	Objective	0/0/2022	0/0/2022	Name			

Plan updates and progress reports, for each planning element, are intended to be completed every other month to facilitate provision of Dashboard Reports to the Hopeful Horizon's Board of Directors.

1. The Chief Development Officer (CDO) will initiate the plan update/progress report by sending an email to the designated reporter (Lead. The progress report will be for the two months immediately preceding the month of request (i.e., a request is initiated in March 2022 for the reporting period 1.1.22-2.28.22).
 2. The responsible reporter is requested to follow the FileShare link for the referenced report and address:
 - a. % Complete at the objective level year-to-date (overarching goal achievement and % Complete for the strategic area include formulas and will calculate automatically upon data entry at the objective level),
 - b. Updates to start and/or finish dates if they are not established or need to be updated,
 - c. Required changes to responsible staff. Any change to the assigned lead must be approved by the Chief Executive Officer (CEO).
 - d. Add clarifying notes if indicated or helpful, and
 - e. Summarize progress inclusive of milestones met, key decisions/action required, and identified barriers.
 3. Upon progress report completion, the responsible reporter should notify the project manager by email.
- B. Dashboard Report: The project manager(s) will verify all progress reports are updated and prepare the [Strategic Plan Dashboard Report](#) including:

 STRATEGIC PLAN DASHBOARD & Leadership Report Date: _____			
Planning Element	Status to Goal	Trend	Subjective Analysis & Notes
Leadership - Governance - Strategic Direction Strategic Plan Detail	✘ 0%	-	
Operations Management Strategic Plan Detail	✘ 0%	-	
Clinical Treatment & Services Strategic Plan Detail	✘ 0%	-	
Finance & Fund Development Strategic Plan Detail	✘ 0%	-	
Quality & Institutional Effectiveness Strategic Plan Detail	✘ 0%	-	
Executive Report	Operations: Community Collaboration: Policy:		

1. Verify all formulas and links reflect the appropriate and updated information. The Dashboard Report is structured to include objective analysis of progress including “Status to Goal” and “Trend”:
 - Status to Goal is a conditionally formatted cell derived from the progress reports (cell A2) for each of the planning element progress reports. The conditional formatting reflects the overall percent complete for the planning element and includes the following dashboard: 1) 0%-33% complete ♦, 2) 34%-66% complete ▲, and 3) 67%-100% complete ●.
 - Update the trend information by extending the Sparkline (Click on the trend line to access Sparkline editing “Sparkline Tools” at the top of the screen). Selected edit data, “Edit Single Sparkline’s Data.” On the trend tab extend the trend data to include the report period. The sparkline trend does not have an associated scale and are not intended for comparison between planning areas.
2. Update the “Strategic Plan Detail” link to the most PDF document for the covered report period.
3. Updates links for other supporting documents as appropriate (stakeholder survey, planning area presentations, other).
4. Proof report narratives for spelling, grammar, and other accuracies (corrections must be made in the source document).
5. Retain the current report period (Dashboard Report) as a PDF using “Save As” (hyperlinks will not work in a print to PDF version). Save the PDF documents in the appropriate subfolder with a date sensitive file name.
6. Expands dashboard reports and progress report content (row height additional rows) as new information is updated/added.
7. Forward the updated dashboard reports for CEO review, addition of the “Executive Report”, and inclusion in the Board of Director’s meeting materials.
8. Share the Dashboard report with Hopeful Horizon employees.
9. Update strategic plan information to the Hopeful Horizon’s website.

V. **File Sharing and File Management:** Strategic Plan records and reports are in a Shared File named “Strategic Plan”. File access is based on permissions:

1. [Dashboard Report](#) is prepared for the Board of Directors and other key stakeholders and is located at the following location:
2. [Management Report](#) is used by the Leadership Team and is located at the following SharePoint location:

File Name: Project Plans

Related progress reports are retained in the same file location in sub-folders. Within each planning element sub-folder is another folder in which historical records of progress reports are retained (converted to PDF and date stamped).

VI. **Plan Presentation:** The CEO shall designate a planning area lead to make a more detailed presentation at each Board meeting. The designated presenter shall use a standard PowerPoint template and include the following in the presentation:

- a. Presenter(s) Name(s), Department(s) and Title(s)
- b. Strategic goals
- c. Objective and subjective assessment of progress to plan (including any new stakeholder feedback for the targeted area)
- d. Identified barriers
- e. Recommended Action

Communication and Training:

Staff assigned strategic plan reporting responsibility will receive initial instruction and ongoing support in entering and updating the Strategic Plan Management Report. The CDO shall prepare the final Dashboard Report for the CEO's presentation to the Board and dissemination to staff/other stakeholders.

Definitions:

NA

Other Related Materials:

Strategic Plan Management Report
Strategic Plan Dashboard Report

References/Legal Authority:

NA

Change Log:

Date of Change	Description of Change	Responsible Party
1.2023	Update procedure format	N. Miller, Program Evaluation