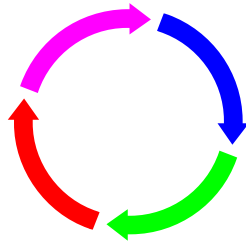


ORGANIZATIONAL PLANNING CYCLE



First Quarter: Organizational Self-Assessment

- ◆ The Organizational Assessment is *diagnostic*—it tells you where you are
- ◆ Evaluate effectiveness of programs, services & management systems against pre-determined objectives with measurable outcomes
- ◆ Evaluate functioning & effectiveness of staff, committees & Board against established annual goals
- ◆ Gather information to determine changes in the community's need for services
- ◆ Assess other external issues/events that affect the organization

Second Quarter: Strategic Plan Review

- ◆ The Strategic Plan is *directional*—it tells you where you're going
- ◆ Review the Strategic Plan for achievement of objectives, effectiveness of strategies & completion of assignments
- ◆ Update the plan for the coming year based on this review & information learned through the Organizational Assessment

Third Quarter: Business/Operational Plan Review

- ◆ The Business/Operational Plan is *prescriptive*—it tells you what it will take to get where you want to go
- ◆ Review the Business/Operational Plan for compatibility with the modified Strategic Plan
- ◆ Update the plan based on identified changes in resources needed

Fourth Quarter: Annual Budget Plan

- ◆ The Annual Budget is *distributive*—it tells you how to organize to get there
- ◆ Review year-to-date financial statements
- ◆ Develop the annual fundraising plan
- ◆ Draft the organization's budget for the coming year

Source: Developed by Barbara H. Dunn (2004) based on information from Wallace Stettinius' Strategic Management Classes, VCU's Especially for Nonprofits, Richmond, VA.

Dunn Handout: WBCF Training

Table 1. Evaluation Plan: *Examples with Different Types of Outcomes*

Outcome Objectives	Indicators/ Measures	Target/ Benchmark	Baseline	Conditions/ Limitations	Data Source/ Collection	Results & Comments
<i>Measurable result you hope to achieve (use an active verb)</i>	<i>What is being measured</i>	<i>Degree of change expected</i>	<i>Starting point or past experience</i>	<i>Criteria for inclusion; describe & define group or project</i>	<i>Where data will come from & how/when collected</i>	<i>Your results at 6 & 12 months; brief comments on challenges/problems</i>
1. Maintain client satisfaction	Percent satisfied or very satisfied with services	95%	90% (last year)	Includes all clients served; average 500	Client survey distributed each June	June 2007: 96%
2. Improve fundraising capacity	a. Hire consultant b. Provide Board training c. Develop fundraising plan* <i>*A copy of any consultant products should be attached to final grant report</i>	Milestones: all yes/true	NA	a. Consultant will be Richmond-based & hired by 4/15/07. b. Two training sessions will be planned. c. FR Plan will be completed by 8/31/07	Administrative process; no real data collection	a. Consultant hired 4/30/07; not available until then. b. Two Board training sessions were held on 5/20/07 & 7/25/07. c. FR plan approved on 8/15/07 (copy attached)
3. Increase diversity of audiences	a. Percent racial/ethnic minorities b. Percent under age 45	a. 20% b. 15%	a. 15% last year b. 10% last year	Includes all persons attending 2007 performances	Audiences will be requested to complete survey after each performance	a.20%; based on respondents from one performance b.12%; may be cost-related
4. Improve school readiness	Percent of parents reading to their children	90%	Will establish baseline on program entry (@ research about 30%)	Includes parents of children ages 3-4 enrolled in Head Start	Parent self-report after 3 & 6 months in program	50% @ 3 months (baseline 25%); 60% @ 6 months; need to assess parent literacy & language skills
5. Provide preventive health care for women	Number & percent of women receiving annual Pap smears	80% (estimated 1,200 women)	50% last year	Includes all women over 18 with at least one well visit	Chart review or electronic database	70%; difficulty with data retrieval from database

Dunn Handout: WBCF Training

Table 2. Evaluation Plan: *Example from home visiting program for high risk children*

Program Variables	Indicators/ Measures	Data Sources	Data Collection/ Timing	Resources Needed	Reporting (when/to whom)
<i>Process Evaluation</i>					
1. Home visitor training completed	Program records	Administrative records	Immediately following training	Program coordinator's time	Program coordinator (PC) reports to home visiting agencies on completion (by July 1, 2007)
2. Home visit protocol completed	Protocol available	Protocol itself	On completion	Multi-agency planning/input in development	PC reports to agencies collaborating on completion (by Sept 1, 2007)
3. Media materials developed (ads, PSAs, pamphlets)	Materials available	Administrative records & materials	As materials are completed	<i>Pro bono</i> ad firm's assistance with ads, PSAs; purchase pamphlets from model program	PC reports to agency work committees on completion (by Sept 1, 2007)
<i>Outcome/Impact/Effect Evaluation</i>					
1. Knowledge & attitudes: (a) parents; (b) home visitors	% change in parenting knowledge	Pre & post-test (parents asked orally if low reading level)	Test scores: (a) on entry to program & after completion; (b) before training & after training	Design questions for both groups; RN to administer test or lay home visitor to read to parent	PC reports on completion & in final report to agencies & funders
2. Child health	% up to date on immunizations	Parent report & health provider record	At program entry & on completion/12 months	Data entry	PC reports to agencies at 6 & 12 months; funders in final report @ 12 mo.
3. Parenting behavior	% increase in scores	H.O.M.E. instruments (@ to child's age)	At program entry & on completion/12 months	Interviewers trained in HOME instrument	PC reports to agencies at 6 & 12 months; funders in final report @ 12 mo.

Dunn Handout: WBCF Training

References & Resources

American Academy of Pediatrics (2006). *Evaluating Your Community Program: Part I. Designing Your Evaluation*. (www.aap.org/commpeps/htpcp)

Cortland Counts 2006. *An Assessment of Health & Well-Being in Cortland County, NY*. (www.sevenvalleyshealth.org/report06/1_1.htm)

Innovation Network; Point K Learning Center (2005). *The Big Picture; Organizational Assessment Tool; Logic Model Workbook; Evaluation Plan Workbook* (www.innonet.org)

Jenkins Foundation (Aug. 2006). *Youth Violence Prevention in Metropolitan Richmond*. A Report to the Jenkins Foundation, prepared by BH Dunn. (www.connectnetwork.org/richmond & look under *Research by Topic*)

National Cancer Institute (Sept. 2005). *Theory at a Glance: A Guide for Health Promotion Practice*. Washington, DC: NIH, DHHS (www.nci.nih.gov/theory.pdf)

Taylor-Powell, E. (2003). *Logic Models to Enhance Program Performance*. University of Wisconsin-Extension (www.uwex.edu/ces/lmcourse)

The Urban Institute (2003). *Key Steps in Outcome Management* (www.urban.org/UploadedPDF/310776_KeySteps.pdf)

United Way Services of Greater Richmond (no date). *A Guide to Developing an Outcome Logic Model & Measurement Plan*. (Powerpoint: www.yourunitedway.org)

Va. Dept. of Education (2002). *Planning for Results Manual*. (www.pen.k12.va.us)

York, PJ (2003). *Learning as We Go: Making Evaluation Work for Everyone*. (Exhibit B. *The Evaluative Learning Continuum*). TCC Group Briefing Papers. (www.tccgrp.com)

Need an evaluation tutorial? (<http://pathwayscourses.samhsa.gov/index.htm>)

Try CSAP's Prevention Pathways, free online courses: *Evaluation for the Unevaluated (Program Evaluation 101 & 102)*.

Needs Assessments (state & local)

Bon Secours Richmond Health System (August 2003). *Immigrant Health Needs Assessment for the Greater Richmond Area*. (www.vdh.virginia.gov/CLAS_Act/researchresources/vastudies.htm)

Corona, R; Gonzalez, T; Cohen, R; Edwards, C & Edmonds, T. (December 2006). *Latino Needs Assessment: Health & Safety Needs of Latino Children & Families living in Richmond, VA*. Richmond: VCU's Clark Hill Institute for Positive Youth Development. (<http://clarkhill.org/node/106>).

CSR. (September 2002). *Community resource assessment: 2002*. Arlington, VA: CSR; prepared for VDMHMRSAS. (www.dmhmrzas.virginia.gov/osas-preventioncsap.htm)

The Community Foundation Serving Richmond & Central Virginia (July 2007). *Greater Richmond Area Children & Youth Needs & Assets Assessment*. Prepared by the Central Virginia Health Planning Agency. (www.tcfichmond.org or www.connectnetwork.org/richmond)

Dunn Handout: WBCF Training

Websites (studies, reports, databases)

Annie E. Casey Foundation: www.aecf.org (focuses on children & poverty)
Sponsors the *KidsCount* Database: www.kidscount.org

Connect Richmond: www.connectnetwork.org/richmond (see *Research by Topic* for data)

Brookings Institution: www.brookings.edu (social policy research organization)

DataShare Metro Richmond: www.datashare.vcu.edu (neighborhood level data)

Federal Data: www.fedstats.gov (includes data by state, agency, topic)

Governor's Office of Substance Abuse Prevention, VA: www.gosap.state.va.us (social indicators database)

Harvard School of Public Health: www.diversitydata.org (data for various racial/ethnic groups)

Healthy People 2010: www.healthypeople.gov

NIH Substance Abuse & Mental Health Services Administration: www.samhsa.gov

The Urban Institute: www.urban.org (social & economic issue analysis); Outcome Indicators Project
(www.urban.org/center/cnp/projects/outcomeindicators.cfm)

United Way (outcomes measurement): <http://national.unitedway.org/outcomes/resources/mpo/examples.cfm>

US Census Bureau: www.census.gov; American Community Survey (www.census.gov/acs/www)
Also see UVA's Weldon Cooper Center: www.coopercenter.org

US Centers for Disease Control & Prevention: www.cdc.gov
Includes the National Center for Health Statistics: www.cdc.gov/nchs

US Dept of Education: www.ed.gov
Dept of Health & Human Services: www.dhhs.gov
Dept of Housing & Urban Development: www.hud.gov
Dept of Justice, US: www.usdoj.gov

VA. Center for Healthy Communities: www.vahealthycommunities.com
Virginia Atlas of Community Health includes GIS maps & health indicators by region

VA. Dept of Education: www.pen.k12.va.us
Dept of Health: www.vdh.state.va.us
Dept of Justice: www.dcjs.virginia.gov
Dept of Mental Health, Mental Retardation & Substance Abuse Services: www.dmhmrzas.state.va.us
Dept of Social Services: www.dss.virginia.gov