

## **2013-2016 Strategic Goals and Objectives Elmbrook Humane Society**

### **Mission**

**Provide shelter for homeless animals, promote the human animal bond, and prevent animal cruelty and neglect.**

### **Vision**

**Be the most personal, compassionate, and preferred resource for your animal needs.**

### **Strategic Goals:**

- 1. Align board, staff, and volunteers with the mission and vision.**
- 2. Improve community awareness.**
- 3. Develop and improve partnerships.**
- 4. Ensure financial stability.**

## 1. Align board, staff, and volunteers with the mission and vision.

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p><b>A)</b> Clearly define “No Kill Status” terminology so it can be articulated internally and externally.</p>	<p>Baseline exercise with board to assist with creation of No Kill policy development.</p> <p>Develop and write a board policy addressing the No Kill status.</p> <p>Develop metrics to measure the understanding of No Kill policy.</p> <p>Measure understanding of No Kill policy throughout organization (baseline and beyond).</p>	<p>Board President and Executive Committee</p>	<p>End of 2Q14 Completed</p>	
<p><b>B)</b> Create training and mentoring opportunities for board to learn and understand the strategic direction of the EBHS.</p> <p>a. Continue professional development opportunities to further improve board growth and competency.</p>	<p>Measure the effectiveness of the internal communication plan with staff, volunteers, and board. (reference measurements in 1B to develop tools and metrics)</p>	<p>Board President and Executive Committee</p>	<p>Monthly Board Mtg. Investment Learning Session and Communications Introduction, March 2015; ongoing</p>	<p>Consider a consultant or board member to assist with the facilitation of building organizational capacity on the board.</p>

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p><b>C)</b> Develop an internal plan to communicate mission, vision, and values.</p> <p>a. Create training and mentoring opportunities for staff and volunteers to learn and understand the strategic direction of EBHS.</p> <p>b. Continue professional development opportunities to further improve staff growth and competency.</p> <p><b>Considerations:</b> Clearly define alignment of roles and relationships to mission, vision, and values of EBHS.</p>	Create internal communication plan.	Executive Director with Leadership Team	In Progress – complete by 2Q2015 and then efforts to continue	<p>Consider a consultant to support a team environment.</p> <p>Consider allocation for professional staff development opportunities.</p> <p>Consider utilizing Personnel Committee to assist Executive Director in a support role.</p>
	Develop tools and metrics to measure the effectiveness of the internal communication plan and determine desired target. (For example, tools developed might include surveys.)			
	Measure the effectiveness of the internal communication plan with staff, volunteers, and board.			
<p><b>D)</b> Establish measures to monitor progress of decisions at all levels of EBHS to ensure that day to day tactical behavior aligns with the strategic direction of the organization.</p>	Support of the strategic plan included 2014 performance reviews and goal setting process for all employees.	Executive Director	Completed	
	2015 performance evaluations encompass measuring day to day tactical alignment to the strategic plan. (metrics must be developed)	Executive Director	Completed	
	Board meeting agendas include addressing each strategic goal at every meeting. (accountability)	Board President and Executive Director	Completed, ongoing	
	Staff meeting agendas include addressing relevant strategic goals at each meeting.	Executive Director	Introduced, ongoing	

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
	Volunteer meeting agendas include addressing relevant strategic goals at each meeting.	Community Outreach and Volunteer Coordinator	Introduced, ongoing	
<p><b>E)</b> Frequently scheduled review of strategic plan by board leadership.</p> <p><b><u>Considerations:</u></b></p> <ul style="list-style-type: none"> <li>• Monthly review of EBHS Strategic Plan by Executive Committee (for first 6 months of plan implementation.)</li> <li>• Quarterly review of Strategic Plan following first 6 months.</li> <li>• Minimum of an annual Board review of EBHS Strategic Plan (workshop).</li> <li>• The strategic plan is a living document that should be amended and adjusted based on the experiences of the team.</li> </ul>	Evaluate completion and status of objectives, timeline adjustments, and re-evaluation of goals and objectives if needed.	Board President, Executive Committee and full Board	Introduced, ongoing	

## 2. Improve community awareness.

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p>A) Develop a marketing and external communications plan (including budget).</p> <p><u>Considerations:</u></p> <ul style="list-style-type: none"> <li>• Re-evaluate marketing plan in place today.</li> <li>• Conduct a critical review of the business including, products and services offered, target market, and other key essential elements to ensure clear branding campaign.</li> <li>• Plan should evaluate and address future needs in maintaining alignment with mission, vision, and values.</li> <li>• Plan should incorporate an on-going continuous improvement cycle to constantly evaluate marketing initiatives.</li> <li>• Tools should be evaluated and chosen for disseminating information (such as social media, mailings, ads....)</li> </ul>	<p>Develop an external marketing plan.</p>	<p>Community Outreach and Volunteer Coordinator and Executive Director</p>	<p>1Q2016</p>	<p>Engage/hire marketing consultant to provide marketing plan development expertise.</p> <p>Considerations of additional funds for marketing in budget.</p>

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<ul style="list-style-type: none"> <li>Utilizing the “No Kill” strategy in 1A, create a plan to educate and communicate the “No Kill” terminology externally.</li> </ul>				
<b>B)</b> Implement a marketing and external communications plan (including budget).	Develop the tools and metrics to evaluate the effectiveness of the external communications marketing plan.  <b><u>Considerations:</u></b>  Measurements often include surveys before and after to evaluate whether perceptions have changed, increased, or decreased.	Community Outreach and Volunteer Coordinator and Executive Director	3Q2016	
	Measure the effectiveness of the external communications marketing plan.	Community Outreach and Volunteer Coordinator and Executive Director	1Q2017	

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p>C) Analyze and evaluate the feasibility of an external educational outreach program. (Example: school outreach).</p> <p><u>Considerations:</u></p> <ul style="list-style-type: none"> <li>• Does EBHS have staff in place to implement a high quality external educational outreach program?</li> <li>• Partnerships with other humane societies</li> <li>• Cost associated</li> <li>• Strategic development of external education plan</li> </ul>	<p>Cost/Benefit analysis of implementing an external educational outreach program.</p>	<p>Executive Director and Community Outreach and Volunteer Coordinator</p>	<p>2Q2016</p>	

### 3. Develop and improve partnerships.

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
A) Create list of current and potential partners.	Develop metrics to measure potential partner effectiveness and value to the EBHS organization.	Executive Director and Leadership Team	In progress, ongoing	
B) Utilizing data from 3A, determine key partners and formalize relationships to advance the mission and vision of the organization.	Develop a list of key partners.	Executive Director and Leadership Team	In progress, ongoing	
C) Monitor current and future partnerships and collect data on status of relationships.	Develop metrics to measure partner effectiveness and value to the EBHS organization (on-going process to cultivate new relationships and nurture established relationships).	Executive Director and Leadership Team	In progress, ongoing	



## 4. Ensure financial stability.

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p>A) Develop an effective Fund Development Strategy.</p> <p><u>Considerations:</u></p> <ul style="list-style-type: none"> <li>Analyze all current or potential community outreach initiatives. Determine benefit to EBHS; an increase of revenue or building good will in the community (“fundraiser” or “friendraiser”).</li> <li>Examine ROI for current or potential community outreach initiatives (see above)</li> <li>Re-evaluate current community outreach position; consider creation of Fund Development Director.</li> <li>Develop a fund development plan.</li> <li>Achieve diversity in sources of funding.</li> <li>Review and revise (if necessary) reserve policy.</li> </ul>	<p>Develop metrics to measure successful fund development implementation. (This may include metrics such as % donor dollar increase over the course of x years. Another measurement might be the diversity of donors and funding sources.) Metrics developed by Fund Development Committee and approved by full board.(see 3C below)</p>	<p>Board President and Executive Director</p>	<p>In progress, 4Q2015</p>	<p>Funds to hire either a Development Director or Assistant position.</p> <p>Additional funds to increase the capacity at which we engage in fund development.</p>

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<ul style="list-style-type: none"> <li>Determine skill set required for members of fund development committee</li> </ul>				
<b>B) Redevelopment of Fund Development Committee</b>	Develop goals for Fund Development Committee.	Board President designates Fund Development Committee Chair and sit on Fund Development Committee.	Completed	
	Measure effectiveness of committee against goal achievement.		4Q2015	
<b>C) Implement an effective Fund Development Strategy.</b>	Measure the effectiveness of the Fund Development Strategy (consider annual evaluation and adjust strategy based on progress achieved.)	Board President, Executive Director, and Fund Development Committee	4Q2015	

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p><b>D) Develop a profitable Investment Strategy</b></p> <p><u>Considerations:</u></p> <ul style="list-style-type: none"> <li>• Review current investment policy</li> <li>• Consider creating an investment committee.</li> <li>• Review and revise reserve policy.</li> <li>• Determine qualifications of investment committee members.</li> </ul>	<p>Develop metrics to measure successful Investment Strategy. Consider development of short-term and long-term goals. . (This may include metrics such as % Return on Investment (ROI) of investment portfolio. May also include asset allocation goals for organization).</p>	<p>Executive Director, Investment Committee Chair Board Member (designated by Board President)</p>	<p>2Q2015</p>	
	<p>Measure Investment Strategy against defined metrics.</p>	<p>Executive Director, Investment Committee Chair</p>	<p>2Q2016</p>	

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p><b>E.</b> Develop a process to determine future organizational needs.</p> <p><b>Considerations:</b></p> <ul style="list-style-type: none"> <li>• Process should be an on-going effort to continually evaluate future organizational needs. This process will evaluate all potential programs and opportunities</li> <li>• Develop a set of criteria that EBHS utilizes to examine current and future opportunities for the organization. Cost/Benefit analysis being a primary consideration for these opportunities. This template should be directly correlated with the goals of the strategic plan.</li> <li>• Timing</li> <li>• Industry trends</li> <li>• Facilities</li> <li>• Utilizing criteria established above, consider a plan to examine other revenue sources (a “world without puppies”)</li> </ul>	<p>Develop a process to evaluate all potential programs and opportunities considered by EBHS.</p>	<p>Executive Director, Board President, and designated ad-hoc committee</p>	<p>End of 2015</p>	<p>Consider outside consulting services to assist with development of process and criteria to evaluate potential programs and opportunities. The development of a Critical Business Review (CBR) for all opportunities will provide EBHS with a structure to evaluate all opportunities (products, services, programs, facilities).</p>
	<p>Develop metrics to measure effectiveness of process. (These may include % increase in revenues that can be used to enhance the effectiveness of achieving the EBHS mission. Another measurement might be the number of organizational opportunities evaluated.)</p>	<p>Executive Director, Board President, and designated ad-hoc committee</p>	<p>End of 2015</p>	
	<p>Measure effectiveness of organizational need evaluation process.</p>	<p>Executive Director, Board President, and designated ad-hoc committee</p>	<p>End of 2016</p>	

OBJECTIVES	Measurement	Responsibility	Timing	Resource Level
<p><b>F.</b> Analyze the demand for increasing dog training services using the criteria established above in 4E.</p> <p><b>Considerations:</b> Evaluation of this program/service can be the first “test” to evaluate the process developed above in 4E.</p>	<p>Cost/Benefit analysis of increasing dog training services.</p>	<p>Dog Trainer and Executive Director</p>	<p>1Q2016</p>	