PRIORITY ANALYSIS EXERCISE

What Are Key Drivers of Future Success?	Rationale – Why Is This Strategic & Not Just Urgent?	What Do We Intend To Achieve By Focusing Here?	What Will Happen If We Do Nothing?

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OPERATIONAL MATRIX EXERCISE

STRATEGIC PRIORITY	DESIRED ACHIEMENTS / GOALS	PRESERVE / PROTECT	MODIFY / TRANSFORM	ELIMINATE / DISCONTINUE	AVOID / PREVENT

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GOAL & OBJECTIVE EXERCISE

STRATEGIC PRIORITY	DESIRED ACHIEVEMENT / GOAL	OBJECTIVE / SUCCESS PATHWAY

STRATEGY DEVELOPMENT EXERCISE

STRATEGIC PRIORITY	GOAL / DESIRED ACHIEVEMENT	OBJECTIVE / SUCCESS PATHWAY	GAME CHANGING ACTIONS / STRATEGIES

SAMPLE ACTION PLAN

Goal 1: Raise $26 million dollars to finance school expansion.

Objective 1: **Undertake a 24-month capital building campaign to finance the construction of state-of-the-art facilities.**

	Strategy	Accountable Party	Implementation Timeframe	Anticipated Deliverable	Resources Needed
A.	Develop a strategic plan that clarifies school's organizational direction; specifies a corresponding course of action; and guides the school's critical resource allocation decisions.	■ Principal ■ Advisory Board	■ Summer 2015	■ 2015 – 2018 strategic plan	■ Planning consultants
A.	Produce a case statement that explains: a) the needs the school is seeking to meet through its fundraising; b) its plans for addressing these needs; and c) what it can achieve with additional resources.	■ Principal ■ Advisory Board	■ Summer 2015 – Fall 2015	■ Fundraising case statement	■ Development expert or consulting firm
A.	Conduct a feasibility study that identifies prospective funding sources and effective means of cultivating support. The study should also establish a reasonable timeline for executing school's capital campaign.	■ Principal ■ Advisory Board	■ Fall 2015 – Winter 2015	■ Feasibility study	■ Development expert or consulting firm
A.	Identify an initial funding champion to kick-off major contributions to school's capital campaign. Use this commitment to build momentum around the school's fundraising efforts with other donor prospects.	■ Advisory Board	■ Fall 2015 – Winter 2015	■ Initial capital campaign champion ■ First major gift ■ Heightened donor interest in school	■ Advisory board connections

ACTION PLAN EXERCISE

Strategy	Accountable Party	Timeframe	Anticipated Deliverable	Resources Needed

SUCCESS MEASURE EXERCISE

STRATEGIC PRIORITY	PRIORITY GOAL	SUCCESS MEASURE

TRACKING SUCCESS

Scorecard Development:

- Progress Assessment
  - Presents strategies, their anticipated deliverables, a color-coded assessment of whether they have been achieved and any clarifying comments
- Data Collection Process
  - Identifies process for collecting data and reporting findings
    - Who will do this?
    - How frequently?

Strategy Description	Status	Date Completed	Anticipated Deliverable	Actual Deliverable	Comments
1. Recruit additional directors with fundraising expertise	**Done**	10/30/13	2 new directors	3 new directors	Board's nominating committees identified three strong candidates, all of which the board approved
2. Develop a strategic communications plan	**In Progress**	2/10/13 – Present	New communica-tions plan	N/A	The communications director and board marketing committee are still working to complete the communications plan. One more month of work, which includes 2 more meetings, is needed
3. Research membership pathways, giving levels and histories and retention statistics	**On Hold**	N/A	Donor analysis report	N/A	Director of development resigned. New staff prospects being vetted to fill the existing vacancy