



SPiN: Strategic Planning in Nonprofits

Sample Monitoring Plan

This was included as a part of an organization’s strategic plan, documenting their intention to reference the plan and track their progress during the coming years. Remember to lay out a monitoring plan that is appropriate to your organization’s size and stage of development.

Monitoring Our Progress

The board is committed to monitoring progress toward these goals by reviewing the plan regularly.

- The management staff will develop annual goals each year in January that move the organization toward accomplishment of the outcomes set forth in the plan.
- The board’s annual goals will be set to align with the strategic plan.
- Leadership from management staff and the board will report on progress made toward plan annual goals on a quarterly basis, using a dashboard format where the status of each initiative is clearly indicated.
- Full reports will take place in January and July, with targeted discussion, problem-solving and mid-course corrections for specific items of concern taking place in April and October.

Currently, the plan has a five-year timeframe. At the midway point of the plan, the board will discuss whether the plan remains useful to the organization. If circumstances indicate that it would be valuable, a decision may be made to undertake strategic planning at the three-year point rather than waiting until year five.

The plan is intended as a flexible roadmap that sets direction but should not unduly limit the agency’s ability to seize new opportunities or respond to emergent community issues.

