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Strategic Planning in the Non Profit Sector: Creating a Strategic Plan for Affinity 2014-2017

Emilee Taplin-Lacey

University of Southern Maine, Muskie School of Public Service

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Strategic Planning in the Non Profit Sector

Creating a Strategic Plan for Affinity 2014-2017

Emilee Taplin-Lacy

3/25/2014

Capstone Advisor: Kate L. Forhan, Ph.D.

This report is submitted in partial fulfilment of the requirement for the Master's Degree in Public Policy and Management at the Muskie School of Public Service.

Contents

Executive Summary..... 1

Introduction 2

Literature Review 3

Background and History..... 5

 History 5

 Services 5

 Organizational Structure 6

Process and Results..... 8

Summary of Environmental Factors 10

 External Environment 10

 Internal Environment..... 12

Strengths, Weaknesses, Opportunities, Threats..... 13

 Strengths and Opportunities 13

 Weaknesses and Threats 14

Internal Weakness..... 14

External Weakness..... 14

Next Steps 15

 Action Plan 15

Strategic Overview 16

 Mission:..... 16

 Values:..... 17

 Strategic Goals 17

Appendix I: Key Definitions i

Appendix II: Strategic Planning Agenda iii

Appendix III: Strategic Plan Agenda with Facilitator Breakdown iv

Appendix IV: SWOT Matrix Worksheet..... vi

Appendix V: Mission Statement Questions vii

Appendix VI: Organizational Chart..... viii

Appendix VI: Vision Statement Wordle ix

Appendix VII: Timeline **Error! Bookmark not defined.**

Appendix VIII: References ix

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Executive Summary

The purpose of engaging in the creation of a strategic plan for *Affinity* is to integrate knowledge acquired through participation in the Public Policy and Nonprofit Management Master's Degree program at the Muskie School of Public Service. In addition, my facilitation of a strategic planning process for *Affinity* is meant to meet the requirements of graduation and represents my capstone project in this regard.

The year 2014 marks the 10 year anniversary of *Affinity*. The organization has seen steady growth over the past ten years and is entering a new phase in its development. Focused on continuing its service expansion and solidifying its financial situation, *Affinity* has hopes and plans for the future. Until today, *Affinity* has functioned successfully without a strategic plan. However, the Executive Director and other members of the management team recognize the need for a more formal and concrete plan of growth. In order to meet this need, and to reenergize the *Affinity* staff, the organization has undergone a strategic planning process.

The goal of creating a strategic plan is to provide *Affinity* with a sense of focus for the next three years as it navigates a turbulent external environment and seeks to formalize its internal processes in the interest of serving its clients with the highest degree of efficiency and quality. This process integrated environmental reviews, organizational assessment, and stakeholder identification to pinpoint key areas of attention. It is the hope that this strategic plan will provide needed focus and growth for *Affinity* and will mark the beginning of a more formal planning approach for the organization.

The resulting strategic plan contains six strategic goals, with strategies to meet each goal over the next three years. These goals are designed to address the most important needs identified through a strategic planning process involving the *Affinity* management team, administrative staff, and Executive Director and will further incorporate feedback from clients, staff, and other stakeholders before being formally implemented. Annual review will occur to ensure that the organization is on track to meet the three year goals. With these reviews, adjustments will be made as needed to account for the shifting environment both externally and internally. At the completion of the three year mark, *Affinity* will assess its overall success with the plan and engage in further strategic planning to guide continued growth and success over the coming years. It is also the hope that future planning will be both welcomed by, and more directly include, a larger group of stakeholders through the integration of more direct client and staff input and planning throughout the process.

Introduction

Affinity was founded in 2004 by a group of four individuals determined to continue the mission and values of a previous organization that had been shuttered. At the time, the organization was developed with essentials in mind; meeting contractual requirements, completing appropriate paperwork, and providing family led support services for the individuals they served. Early in 2005, the founding Executive Director parted ways with the organization. This transition introduced a time of uncertainty and *Affinity* nearly closed. Driven by determination and a willingness to work with Maine State DHHS, *Affinity* was able to sustain its core services in 2005. Toward the end of 2005, *Affinity* tentatively expanded into providing Adult Support Services at the request of a family.

The last eight years have seen numerous changes and growth for the organization. *Affinity* has added five new employees at the management level since 2008 in order to meet the growing demand in both of their programs. In addition, two administrative positions were created to assist with program support as the complexity of services increased. These changes were instigated primarily in response to the evolving external environment including changes in regulations and program procedures instigated by the Maine State Department of Health and Human Services (DHHS). This success and growth was driven by the shared belief in a core set of values and a strong commitment to the mission of the organization. Today, *Affinity* provides support services to 57 children and 45 adults and employs 67 staff.

Despite the rapid expansion in terms of number of staff and clients, *Affinity* has taken a thoughtful approach to growth, aiming to maintain the high quality of services and attention that the organization values. Reliance on one primary source of funding necessitates an acute awareness of the regulatory and evolving financial policies at both the state and federal levels. Similarly, as the MaineCare regulations have evolved and new entities have entered the service provision arena, the complexity of the work has added another layer of compliance monitoring within the agency.

Operating without any formal business or strategic plan since its inception, *Affinity* has focused solely on the provision of its two core programs: Children's Section 28 and Adult's Section 21 and 29. Upon the heels of *Affinity's* successes, the organization is at a key point in its growth. Applying the life cycle theory of organizations, *Affinity* is a prime example of an organization in its formalization stage (Daft, 2010). More bureaucracy is being introduced in order to keep up with the rate of growth within the organization as well as to compensate for the increasing demands from MaineCare and DHHS. However, as management and staff numbers increase, the history of *Affinity* risks been lost and the individually held values and understanding mission are becoming more

diverse. The coming years are expected to bring continued change and challenges from a regulatory and financial point of view. In order to be prepared to meet these challenges and continue its survival, the creation of a strategic plan is deemed an important factor in leading *Affinity* through the upcoming years.

Literature Review

As discussed by Jennifer Alexander (2000), “nonprofit organizations engaged in human service delivery are experiencing serious threats to their survival due to dramatic changes in their environments”(p. 287) Trying to keep up with changes in funding sources and allocations, increased case loads, and ever evolving legislative rules can easily derail an organization from its core mission. At the very least, such daily pressures can prevent an organization from engaging in continual change. Without the ability to engage in growth and change, the mission of a nonprofit can become outdated or disjointed from its daily functions. Jim Collins (2005) asserts that a nonprofit organization’s success is, “assessed relative to mission, not by financial returns . . . the critical question is ‘how effectively do we deliver on our mission and make a distinctive impact, relative to our resources?’”(p. 5). Without reflection on the success of its mission and its core programs, a nonprofit runs the risk of becoming unfocused and at worst, ineffective. As Goodsell (2011) discusses, an “agency must be relentless in engaging in renewal processes by which continuous improvement is sought” (p. 24). One such way to ensure renewal and improvement is through the development of a strategic plan.

In its simplest form, strategic planning is, “the process of determining: (1) **what** your organization intends to accomplish, and (2) **how** you will direct the organization and its resources toward accomplishing these goals over the coming months and years” (Barry, 1997, p. 5). Broader in their scope than business or operating plans, strategic plans reflect back on the mission, vision, and values of the organization. More specifically, “strategic planning is an approach to dealing with the serious challenges that organizations . . . face. These challenges require deliberation and discipline on the part of leaders if they are to be effectively managed” (Bryson, 2011, p. 3). There are many approaches to strategic planning which range in degree of time-commitment and personnel and financial investment. Much as the resulting plan is specific to the organization, the process and templates can be altered to fit the needs and available resources of the organization.

While the planning process may take on a number of approaches, strategic plans generally incorporate the same core set of attributes:

- Creation or review of mission, vision, and values
- Identification of stakeholders and clients
- Environmental scan or assessment
- Identification of issues and problems
- Strategic planning to address problems, involve stakeholders and clients, and ensure continuation of mission
- Action planning to implement and assess plan
- Continuation of the process as environments evolve and new issues arise

Each of these components integrate to strengthen an organization through ensuring continuing mission, application of vision and values, examining the environment, and creating a plan to achieve change and renewal through the incorporation of these aspects.

In incorporating strategic planning, an organization must recognize that the plan is not a guarantee of success nor is the document expected to be met to the letter within the identified time frame. Rather, it is the strategic planning process that breeds new ideas and reinvigorates participants, stakeholders, and employees. As Henry Mintzberg (2003) discusses, today's evolving market and business models mark new challenges to the classic strategic planning model. It is not possible to identify and plan for all possible outcomes in an organizations environment. This is not the purpose of strategic planning, nor is it the fully intended outcome of engaging in a strategic planning process. A well written plan sets markers by which to ensure the proper path is being followed and allows for re-routing if needed.

Successful strategic planning can help point an organization in a clear and focused direction, guided by the mission and core values upon which it is built. A strategic plan is "a tool that provides guidance in fulfilling a mission with maximum efficiency and impact" (Mittenthal, 2002, p.2) Besides the resulting plan, there are a number of positive outcomes that can be gained through strategic planning. It can guide an organization through their program development, help them focus on their key services, and provide a map for organizational decisions over time (Brinckerhoff, 2009). More importantly, the process of strategic planning can help an organization define their mission statement and develop a clear vision and value system by which to make decisions. Bryson (1995) further asserts, "strategic planning can help facilitate communication and participation, accommodate divergent interests and values, foster wise and reasonably analytic decision making, and promote successful implementation" (p. 5).

Background and History

History

The years from 2008 to present day saw a rapid rate of growth and change within the internal environment of *Affinity*. The Adult Community Program was developed and expanded from a one-to-one support model to its current model of three-to-one supported individuals to staff. *Affinity* moved its offices from Portland to Pineland, with a small satellite office in Portland in 2008. Pineland housed all administrative and Children's Services staff while the Portland location was home for the Adult Services management team. In 2010, the Portland office was relocated to a larger building in order to meet the growing needs and success of the Adult Community Support program. Then, in 2012 due to concerns of fracturing and the impacts of services functioning in silos, the Pineland office was relocated to a building within the same complex as the Adult Community Supports Program. At the same time, the Human Resources Manager relocated to Florida thus introducing the first telecommuting employee at *Affinity*. Among these physical moves, new protocols and policies to create cohesion and efficiency were introduced. MaineCare rules and programs were rewritten and changed, and the funding formula was updated. Starting in 2013, DHHS no longer reviewed and approved services and all relationships were severed with a complete reorganization at the State level. A new entity, APS was in charge of program approval and the approval request process was completely revamped. Despite these changes, *Affinity* continues to expand its client base and maintained a strong reputation within its service community.

Services

Affinity provides two primary service programs, regulated and described within MaineCare Rule under Section 28 Children's Rehabilitation and Community Services and Section 21 and 29, Adult Community Support services. Each program exists to serve individuals with intellectual and developmental disabilities, and with the programs combined allows *Affinity* to serve an individual throughout their lifespan.

Section 28 (referred to as Children's Services at *Affinity*), is contracted through the Maine State Department of Health and Human Services (DHHS). As such, the services have a number of guidelines dictating requirements for supervisors, support staff, level of supervision, and type of programming that can be offered. In addition to the requirements and rules within the contract, these services must also meet MaineCare requirements of medical necessity which excludes a number of activities that are seen as solely recreational or social in nature. Support staff must

undergo a fifty hour training to become a certified Behavioral Health Professional. This training must be completed within the first year of hire.

Children's Services are intended to provide one-on-one skills building support to a child diagnosed with an intellectual or developmental disability (IDD) or autism. There is a strong emphasis on family carry-over, and the long term goal of the services is to increase the ability of the child and family to function without the assistance of a service provider. With these goals in mind, services are provided within the family home and community.

Similar to the Children's Services, Adult Community Supports is regulated through a contract with Maine DHHS and beholden to the rules and regulations within MaineCare. The contract with DHHS is much more informal however, and contains far fewer guidelines detailing requirements of supervisors and program outcomes. Services are driven by a person focused perspective, and the process of developing a plan of support is somewhat guided through a Person Centered Planning process. Individual providers are able to craft support plans within any format they deem appropriate as long as services meet the requirement of medical necessity, creating little overlap among providers in terms of documentation or program provision. Support staff working within Section 21/29 must complete training to become certified as a Direct Support Staff (DSP).

Because the Adult Community Supports program provides support services to adults, a number of the individuals with whom they work are their own guardians. There are also numerous living situations for their clients. Some individuals live at home with their families, some live independently, and others may live in group home settings. Due to these varied home settings, Adult Services are based out of the Portland office location and from there clients go out into the community with support staff. Staff and client ratios are about 1 staff per 3 individuals, and thus staff provide support in group settings.

Organizational Structure

Affinity has a relatively flat organizational structure. There are few levels of bureaucracy present within the structure of the organization. In recent years it has slowly transitioned toward a more hierarchical form, but information travels vertically as well as horizontally among staff. Most information is shared in face-to-face meetings or interactions among the supervisory team. Communication with support staff in the Children's program is more often via electronic communication such as email or text. Face-to-face meetings do occur, but much less frequently

than those among the supervisory team. This is in large part due to the environment of the program where support staff work in the field and rarely need to visit the administrative offices. The Adult Program differs, again due to the physical environment. Within the Adult Program, support staff is located in a central office location and thus interact very frequently with their supervisors.

As a nonprofit, oversight is provided by a Board of Directors. They meet bi-monthly with the Executive Director to assure fiscal compliance and address any complex agency needs. The Board of Directors is composed of elected members who volunteer their time. Current members represent a variety of personal and professional backgrounds. Interaction among the Board of Directors and supervisory and support staff are minimal. Informal meetings may occur once or twice a year.

On a day-to-day basis, the organization is led by the Executive Director. The organization has two primary programs; Children's services and Adult services. Each program is unique not only in its client base, but in their structural and external environments. The Children's program is led by a Senior Program Coordinator who oversees the Children's Program. The Senior Program Coordinator supervises each of the six Program Coordinators and is also responsible for the ensuring quality service delivery to each client and their family. The Program Coordinators in the Children's Program are charged with designing skills-building supportive programs for each of their clients. Currently, each Coordinator oversees 10-14 clients. In addition, the Coordinator is responsible for the training and supervision of the direct support staff that works one-on-one with each client. Support staff work in the field and thus have limited interaction with supervisors.

The Adult Community Supports Program is led by a Senior Program Coordinator who then oversees two Adult Program Coordinators. Adult Program Coordinators develop program offerings for clients, develop individual service plans based on client need and interest, and jointly supervise the 13 direct support staff in the program. The Adult Program is based in the Portland office and thus clients, support staff, and supervisors interact regularly. Problems are addressed immediately as they come up and support staff relies heavily on the support and guidance of the Program Coordinators in the Adult Program. Program Coordinators in the Adult Program meet daily with support staff at the start and end of each day to discuss various program needs and allow for debriefing. At the time of this report, the Senior Program Coordinator had given their report. Immediate plans are not being made to directly replace this position.

Process and Results

The strategic plan was developed through a full-day workshop which included all members of the management team, excluding two individuals who were unable to participate due to personal reasons, the Executive Director, and some administrative staff. For the management staff that was unable to attend, involvement was solicited through feedback on results from the meeting and participation in later conversations regarding finalization of the mission update and action planning phases. The workshop was held at a location outside of the *Affinity* offices in order to encourage new ideas and remove distractions that the usual office environment contains. Prior to the workshop meeting, information was gathered through a review of:

- Organizational Assessment completed previously by this author
- financial situation of the organization including year-to-date and month-end
- written documents including policies and procedures, job descriptions, employee manual, and team minutes
- participation in supervisory level team meetings
- reference to the DHHS and MaineCare websites pertaining to the services provided by *Affinity*
- competing providers within the same geographical service area

This information was utilized in forming topics for discussion during the workshop and incorporated into discussions regarding environmental analysis, stakeholder identification, and mission review.

Early in the process, the potential for a facilitator to be engaged in the workshop meeting was considered. However, after assessment of financial and time constraints within the organization, it was determined that using a facilitator would not provide an added benefit to the planning process equal to the overall cost. To attempt to mitigate for the lack of a facilitator, extensive review of other planning processes was undertaken and two primary texts were utilized. These texts were, “Creating Your Strategic Plan” by John M. Bryson and Farnum K. Alston and “Strategic Planning Workbook for Nonprofit Organizations,” by Bryan W. Barry. The facilitation was led by Emilee Taplin-Lacy, Director of Policy and Quality Improvement.

A combination of the goals based and alignment models of strategic planning were utilized to direct the creation of the strategic plan for *Affinity*. As discussed by Barry (1997), “a goals approach is preferred by organizations that want several core principles, values, or strategic goals to guide the planning for all their divisions or programs” (p. 63). *Affinity* has a strong sense of its overall goals as was determined through its commitment to the mission and its core values. In order

to address the limitations in this approach cautioned by Barry, aspects of an alignment approach were incorporated. The alignment approach integrates “three critical dimensions of the organization [that] can be best aligned: (1) the nonprofit’s mission, (2) its *programming*, and (3) the *resources and support* needed to effectively operate the organization” (p.66). Despite the team’s agreement that an update to the mission was needed, it was determined that the core values and goals remained the same. This allowed for a more focused discussion of planning that was looped back to the mission and *Affinity*’s identified values and vision for the future.

Information gathering culminated in an all-day strategic planning meeting with the planning team which consisted of all members of the management team including the Executive Director.

The planning meeting addressed the following areas:

- History review (including the creation of an organizational timeline)
- Review of Mission
- Identification of vision and values
- Stakeholder identification
- Strengths, Weaknesses, Opportunities, Threats (SWOT) exercise
- Issue identification
- Strategic goals identification

The organization of the planning meeting was not without its difficulties. A very busy and stressful internal environment made it difficult to gather the team at one time. In addition, the ability of management to provide further work outside of the workshop day was limited and impacted by more immediate needs as dictated by their day-to-day duties. The use of a one day, mandatory strategic planning meeting in a location outside of the *Affinity* offices was beneficial in mitigating some of these distractions and in encouraging new thinking about *Affinity* and its future course.

Overall, the workshop proved to be very successful and the team worked well to complete a bulk of the steps necessary in creating the strategic plan. The morning session was dedicated to assessing the organizational environment, internally and externally, creation of a historical time line for major events, reviewing the existing mission, developing an overall vision and values, and then identifying key issues from this process. Multiple techniques were utilized in leading these discussions and developing ideas, these included: brainstorming, snow cards, thought mapping, small group activities, and worksheets.

Following lunch, the meeting focused on the creation of the strategic goals and how they could be implemented. Issues that had been identified prior to taking the lunch break were pared down to six primary concepts which were then translated into the strategic goals. At the completion of the workshop, the team was instructed to begin thinking about the action steps that would be needed in meeting the identified goals. The participants were also asked to provide five words each that they felt represented the values of *Affinity*.

The day after the workshop, an email was sent thanking all participants for their hard work and engagement during the day. The email also contained a reminder of the tasks that remained notably the action planning, mission re-statement, and values identification. Upon receipt of the values from members of the planning team, a Wordle was created to present a visual reference to the common values that were stated. From the five most frequent values identified, statements were created to represent each one. The action planning and mission re-statement was completed at a later team meeting which occurs as part of the regular meeting cycle at *Affinity*.

Summary of Environmental Factors

Every organization and business exists within a diverse set of environments specific to the size, scope, specificity, and intent of their services or products. In order for an organization to function at its best, it must have a complete understanding of these environmental factors, incorporating both the internal and external parameters. *Affinity* underwent an informal organizational assessment in the spring of 2013 which focused specifically on the internal functions of the organization and impacts of the external environment. Findings from this report were utilized in defining the internal environment of the organization for the sake of this report. Some updates were made to account for changes made within the internal structure of the organization since the writing of the original report. While this same document was used to begin identification of the external environment, a bulk of this work was achieved through the completion of a SWOT analysis with the planning team. This process incorporated assessment of the external factors that directly impact *Affinity* and precluded discussion regarding ways the organization could (mitigate) these effects.

External Environment

The external environment can have a major impact on an organization and greatly influence its internal functioning and decision making processes. External forces in relation to *Affinity's*

business environment include State and Federal Departments of Health and Human Services, Case Management Agencies, clients, and other competing agencies. Reviewing these external factors, it is clear that *Affinity* exists in a complex environment with a high level of uncertainty. An organization within such an environment must be diligent about keeping in touch with their ever changing environment and responsive to the related needs.

Affinity is contractually bound with DHHS in providing services and thus is directly affected by the changing and unstable environment currently existing for human services in the Maine State government. Budget cuts and shifting political views further complicate the external environment as the organization is funded solely through MaineCare, leaving it particularly vulnerable to the often unstable environment of State Government and funding cutbacks in DHHS. Due to budget cuts, few adults have been granted funding for Section 29 over the past two years. This has greatly reduced the number of new potential clients coming into the service system. The lack of influx of new clients also means that the Adult Program exists in a much more competitive environment as providers must attract clients currently within the service system.

In addition to financial uncertainty in the form of changing funding formulas, a number of new service providers have entered the market increasing competition. This has impacted *Affinity* in achieving its vision of growth due to a decline in available clients within the immediate environment. According to the DHHS website in Maine, there are 23 other Section 28 service providers (which compete for Children's Services) listed in the same geographical service area as *Affinity*. Within the Adult Services arena, there are 27 other providers serving Cumberland County. Service Providers are unable to directly solicit to potential clients, but various program offerings and perception of quality of services play a strong part in where clients choose to go.

Changes in the organizational structure of the Department of Health and Human Services which include the removal or reassignment of a number of the individuals with whom the organization had built relationships have impacted *Affinity's* business linkage with this important external player. *Affinity* perceives itself to have strong relationships with many Case Management agencies within their geographical area of service. Limited time did not allow for study of this claim by soliciting information from these providers; however it is evident that Case Managers have referred a number of families to *Affinity* for services. This does support the perception that *Affinity* has that the organization is held in high regard among external partners. It is important that *Affinity* continue to grow and build upon these existing relationships among various external partners.

These relationships will help *Affinity* stay relevant to their environment and remain prepared to adapt and change as needed to meet changing demands and expectations.

Internal Environment

At *Affinity*, most major decisions at the supervisory level are made by team consensus and information is regularly shared among the supervisory team. The Executive Director is very open regarding the sharing of operational and financial information with the administrative team and actively seeks their engagement in problem solving. He involves the team in the problem solving process by soliciting ideas, testing responses to planned changes, and engaging them in creating solutions. Supervisors are encouraged to share ideas and suggestions. Often, decisions are made based on intuition and choosing what is perceived as the “best possible option” by the supervisory team. Values of family engagement and professionalism are widely held among the team. Along these lines, Program Coordinators are highly dedicated to their work and fully embody the mission and values of *Affinity*. They indicate a strong allegiance to the organization and have strong personal relationships with one another.

The support staff in the Children’s and Adult’s programs face differing cultural environments due to the physical environment that each exists in. The participatory culture which exists at the administrative level is not as prevalent among direct support staff. Support staff engagement in agency wide decisions is rare and the level of information shared regarding operational and financial situations is minimal.

Direct Support staff working within the Adult Program have a much higher level of interaction with each other than those working in the Children’s Program. The Adult Program is based within the Portland office and thus staff interacts and works with each other daily. This has created a culture unique to the Adult Community Supports program. This program has seen greater conflict among staff and a greater level of voiced dissatisfaction with program changes. Staff and clients rely heavily on Program Coordinators throughout the day. This can make it difficult for Coordinators to stay focused on their work and creates a number of disruptions to their workflow.

Communication between Children’s Services and Adult Program Coordinators is generally limited to bi-weekly administrative staff meetings. These meetings are held every other Tuesday and cover a variety of topics which may affect the Agency. As such, the programs function more as silos within the organization. This is further upheld though the physical separation of the Adult and Children’s Programs at *Affinity*. Organizational silos can present issues of duplication of work or

reduced efficiency as the differing sections have limited communications with one another. While this function is at times necessary due to specialization of services, it does not appear that this is the case for *Affinity*. Shared staffing between the two programs poses a particular issue as there are minimal formalized processes to communicate between supervisors in the program regarding staff issues or programming conflicts.

Strengths, Weaknesses, Opportunities, Threats

In order to address and assess these environmental factors, both internal and external, the planning team engaged in a SWOT (Strengths, Weaknesses, Opportunities, and Threats) exercise. This tool is widely recognized and utilized precisely for environmental review. A SWOT analysis guides participants in assessing each aspect of the environment within which an organization functions, including stakeholder identification. This level of review can provide valuable insight into areas of improvement for an organization as well as existing strengths that can be leveraged to. The following is a summary of the aspects that the team identified during the exercise.

Strengths and Opportunities

Affinity has a strong reputation as being a professional and individual focused service provider. In identifying the qualities that exemplify this, the team recognizes the following strengths internally within the organization:

- Strong communication skills with all members of a supported individuals team
- *Affinity* staff are accessible (available and responsive to staff and families)
- Numerous long-term employees who bring stability and knowledge to our support services
- Committed and dedicated staff at all levels
- *Affinity* strives to offer good benefits to employees at various levels within the agency
- *Affinity* staff represents a variety of educational and professional backgrounds including Social Work, Nursing, Psychology, Therapeutic Recreation, and BCABA.
- We truly care about the individuals we work with
- Decisions are often made via consensus
- *Affinity* has a strong organizational culture which translates into many of the above qualities mentioned.

In discussing the external environment, the team identified these additional opportunities:

- Strong reputation within the community
- Good professional relationships with many other providers across various fields
- Due to our reputation, we are able to take on new referrals via “word-of-mouth”
- BHP’s and DSP’s are dedicated and bring an array of experience
- There are a number of grants that apply to the work we do that we have not yet pursued
- As a member of MACSP (Maine Association of Community Support Providers) we have access to a larger pool of knowledge and information regarding opportunities and threats to our organization
- We have the ability and interest in expanding programs in the future

Weaknesses and Threats

In order to identify areas of growth, the planning team discussed weakness within the internal environment and threats that exist in the external environment. These areas were then utilized to identify the six goal areas addressed within the strategic plan, focusing on what were identified as the most pressing and important issues to tackle in the next three years. The following weaknesses and threats were discussed:

Internal Weakness

- generous benefit package can strain us financially
- desire to be the best can sometimes detract from ability to be efficient in services
- offer minimal in-house trainings to staff
- silo services
- work load is increasing due to changing external environment
- unable to offer many full-time positions
- inefficient and lack of use of technology within the organization

External Weakness

- changing entity that provides service approval
- tumultuous environment of DHHS/State government
- increase of responsibilities and regulations within Children’s Services

- decrease in average hours of service provision
- reliance on only one funding source
- potential staff are often looking for full-time work

Next Steps

An action planning team is being formed within *Affinity* in order to ensure continued attention and dedication to the last steps in finalizing and implementing the strategic plan. Remaining tasks are to identify measurable objectives and develop key performance indicators (KPI) to create subjective methods for monitoring the plan. Upon completion of these additions, the strategic plan and updated vision, mission, and values statements will be shared with stakeholders to garner feedback. The plan will be made accessible via *Affinity*'s current web-site and stakeholders will be notified through multiple methods, including; phone calls, direct email, hard copies in common areas, and social media. At the conclusion of the feedback period, the planning team will review all comments and make changes as deemed appropriate. The action planning team will also be responsible for communicating these updates to DHHS, be reflected in *Affinity* reference materials and on *Affinity*'s web-site, and will also be responsible for monitoring progress over the course of the next three years. Following the completion of these processes, the plan will be formalized and put into action.

Action Plan

At the time of the completion of this report, the action planning is still underway at Affinity. A planning team has been assigned to organize the planning efforts and complete this final step in the strategic planning process.

Strategic Plan 2014-2017

Strategic Overview

As Affinity celebrates its 10 year anniversary, we reflect back on our achievements and are proud of the high standards to which we hold our service provision. As we look to the future for Affinity we dream of success not only for the organization, but most importantly for the individuals with whom we work. In order to guide us through the next three years, we engaged in a strategic planning process and formulated a strategic plan to continue to build on our core values of family and individual involvement, quality services, community integration, and fiscal responsibility.

Affinity is dedicated to strengthening our collaborations and community relationships through more thoughtful and direct integration with various community providers and businesses. We will continue to expand our capacity for excellence by developing more efficient and cohesive systems, allowing Program Coordinators time to engage and interact with the families and individuals with whom they work. Affinity will begin the process of improving our funding base through exploration of appropriate grant opportunities and fundraising events. These funds will help as we explore service expansion, not only in number of individuals served, but also in the scope of therapies and programs offered.

As a team, we envision a future where Affinity is part of a larger community that welcomes and readily engages individuals with IDD and autism. We hope to broaden our service offerings and integrate a more diverse set of therapies and evidence-based programs. Where our programs and services enrich each supported individual's life and our families feel a deep connection with our organization. In this regard, we present the following strategic plan to meet these goals over the next three years. This strategic plan is only the beginning to a greater process of long-term growth for Affinity and will provide us with a solid base from which to expand and meet our future dreams.

Mission:

As part of the strategic planning process, Affinity gathered its planning team to discuss our core values and mission to ensure our commitment and alignment with these statements. While the team agreed that Affinity's existing mission was still representative to its core beliefs, there was consensus that some of the language and overall tone needed updating. After extensive discussion and re-working, the team developed a slightly modified mission that they feel more accurately and clearly represent Affinity's mission and purpose. Affinity's newly updated mission now states:

“To provide support services for individuals with intellectual and developmental disabilities and their families that promotes independence and fosters each individual’s ability to thrive in an inclusive community”

Values:

Affinity has previously not had a formal values statement. While a statement of our core beliefs is displayed on the web-site, this statement was informally created last year. A more thoughtful approach was taken during the planning process to create a clear set of values and relating descriptions which represent Affinity’s beliefs.

Affinity Values:

Family and Individual Focused services: We see the supported individual and their family as the lead decision makers. Affinity engages the family and individual in all aspects of service and incorporates each person’s strengths and interests into service planning and are dedicated to listening to each person’s voice.

Independence: Affinity believes that each individual we support has the ability and desire to be independent in their life. Our programs are designed to foster that independence and to build confidence and skill to that end.

Communication: Affinity prides itself on our strong and consistent communication among all members of a supported individual’s team. We believe that communication is a core component of our success and vital in ensuring individual and family focused services.

Commitment: Affinity is dedicated to their clients and staff. We have a strong commitment to success for all members of our organization and in that regard value a team approach to our program development and delivery.

Strategic Goals

The following strategic plan is broken down into six goals, each with strategies designed to assist us in meeting those goals within the next three years. As the environment changes, goals and strategies may be updated but will always be relevant to and directly related to focused on our overall mission and values statements. We are excited to take these first steps toward achieving our long-term vision of a more integrated, diverse, and enriching set of programs and services for our clients.

Goal I: Expand programmatic offerings to all Affinity clients.

We believe in offering a comprehensive set of life enhancing activities and programs which complement our core mission to foster independence and respect individual choice and interests.

We recognize the many benefits of participation in activities which engage individuals in expanding their horizons and support personal growth.

- Review program offerings from existing competitors to understand where needs may be.
- Assess current staff strengths and interests that may lead to the creation of new programs led by staff.
- Assess client and family needs in regards to services.
- Review financial implications of services identified and assess overall feasibility and impact on the organization.

Goal II: Increase opportunities for participation and engagement from supported individuals and their families across all services.

We value participation and engagement from the individuals and families that we work with every day. Our core values include a strong person and family centered approach, with family driven services as an important component of service delivery. Affinity will explore ways to increase the accessibility for families and individuals to further provide input and engage with our organization to bolster our programs and services.

Strategies:

- Evaluate interest from supported individuals and their families in increasing their participation across the organization.
- Review areas where supported individual and/or family involvement is needed or would improve Affinity services.
- Create at minimum a meaningful annual survey from families and staff to provide feedback on Affinity programs and services.

Goal III: Improve educational and professional learning opportunities for all Affinity staff.

We acknowledge the value of a highly trained, well educated work force. Well supported and knowledgeable staff translates into competent and confident service delivery for all of our clients.

We are committed to increasing access to meaningful and best-practice based trainings to improve the professionalism and quality of services.

Strategies:

- Review current partnerships and opportunities to expand training linkages.
- Engage staff in identifying specific training areas that are needed/requested.
- Evaluate the cost/benefit of providing “in-house” trainings versus referring out or requesting trainers as needed.
- Research options for technology based trainings that may be more accessible for all Affinity staff and families.

Goal IV: Expand our presence in the community by forging new partnerships and continuing to develop existing ones.

We understand the importance of community access and inclusion for all individuals, regardless of ability or uniqueness. Our communities have many wonderful opportunities to offer. We will seek to further fortify existing partnerships in securing community integration and will develop new community relationships to further educate community members and increase opportunities for the diverse and unique group of individuals with whom we work.

Strategies:

- Take stock of current community partnerships.
- Discuss opportunities to work with other organizations in developing programs or trainings.
- Assess organizations and community resources which would complement our programs and reach out to them.
- Engage current supported individuals and staff in identifying community partners that would complement their own interests and goals.

Goal V: Increase quality and efficiency of services.

We recognize the need for clear and precise procedures and policies to ensure efficient and high quality services and employment for our members. To ensure a strong level of service and a cohesive community presence, we will seek out ways to streamline our processes and ensure compliance and best-practice approaches in all areas of our organization.

Strategies:

- Research various technology and data systems which meet our needs.
- Continue to develop and implement clear, agency wide policies which communicate our core values and compliment service delivery needs.
- Review paperwork requirements for all job positions to analyze areas that can be simplified, are redundant, or inefficient.
- Engage all staff in brainstorming innovative ways to become more efficient.

Goal VI: Increase funding to expand service delivery and enhance current program offerings and opportunities.

We are entrusted with the responsible and compliant use of MaineCare funding for all of our services. In an effort to expand opportunities, we will seek out options to increase our funding base to allow greater choice among our programs and services.

Strategies:

- Research and identify program needs outside the scope of our current funding.
- Research grant opportunities which may compliment program development.
- Pursue fundraising activities with the development of an annual fundraising event.
- Increase client base by 25% in the next three years across all programs.

Appendix I: Key Definitions

Goals: A long-term organizational target or direction of development. It states what the organization wants to accomplish or become over the next several years. Goals provide the basis for decisions about the nature, scope, and relative priorities of all projects and activities. Everything the organization does should help it move toward attainment of one or more goals.¹

Implementation or Action Plan: The breakdown of who is responsible for what aspects of the plan, what needs to be in place and when toward meeting the goals and objectives.

Intellectual and Developmental Disability (IDD): *Intellectual disability* is a disability characterized by significant limitations in both intellectual functioning and in adaptive behavior, which covers many everyday social and practical skills. This disability originates before the age of 18². Sometimes intellectual disability is also referred to as *developmental disability* which is a broader term that includes ASD (autism spectrum disorders), epilepsy, cerebral palsy, developmental delay, fetal alcohol syndrome (or FASD) and other disorders that occur during the developmental period³ (birth to age 18).

MaineCare: Maine's Medicaid Program, a federal and state funded health insurance program for low-income Maine residents who have a disability, child, or meet income eligibility guidelines.

Mission: A brief expression of the organizations purpose. It answers the question, "What do we do?"

Objectives: Measureable targets that must be met on the way to attaining a goal.¹

Performance Measure/KPI (Key Performance Indicator): The specific measurements to know that we are meeting our goals and objectives. Can be percent, a certain number of clients, geographical area etc. Anything that is measureable in relation to the plan.

Strategic Planning: The process of determining: (1) what your organization intends to accomplish, and (2) how you will direct your organization and resources toward accomplishing these goals over the coming months and years. The process helps guide an organization in meeting its mission and creating maximum impact. Generally, a strategic plan only covers 2-5 years.

SWOT Exercise: Strengths, weakness, opportunity, and threats exercise. A tool widely used in organizational assessment. Generally, this review is applied both to the internal and external environment in order to identify key areas of need and strength.

¹ Bryson, F. and Alston, F. K. *Creating Your Strategic Plan. A Workbook for Public and Nonprofit Organizations*. 3rd Ed. 2011.

² Retrieved from <http://aidd.org/intellectual-disability/definition#.UzMzwfldWSo>

³ Retrieved from <http://www.thearc.org/page.aspx?pid=2543>

Internal SWOT: An internal application of the SWOT assessment. This review looks only at the people, systems, and programs of an organization.

External SWOT: An external application of the SWOT assessment. This review incorporates stakeholders, competitors, financial, and police environmental considerations. These various impacts are applied to the organization and distilled into the SWOT.

Vision: What the organization is committed to. A statement of the long term goals of the organization, incorporating the set of values and ethical standards, and how they will impact their focus constituency.

Values: The principles and ethics upon which the organization functions. It answers the question, “What do we believe in?”⁴

⁴ Mittenenthal, R.A. *Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders*. TCC Group.

Appendix II: Strategic Planning Agenda

STRATEGIC PLANNING AGENDA

March 11th, 2014

- **INTRODUCTIONS/ OVERVIEW OF THE DAY**
 - What are we doing here today, and what exactly is this strategic plan thingy?
- **AFFINITY IN REVIEW**
 - A look at where we are, where we've been, and dreams about where we will go.
- **VISION, MISSION, AND VALUES UPDATE**
 - It's been 10 years since we first created our mission. Does it still apply?
- **STRENGTHS/LEADERSHIP DISCUSSION**
 - Both individually and as a team, what are our strengths and leadership styles? How can we make the best use of these skills?
- **BREAK**
- **SWOT (STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS)**
 - A discussion of our key areas of strength and areas of improvement.
- **KEY ISSUES AND CHALLENGES**
 - As determined through the SWOT process and team discussion
- **LUNCH**
 - TBD
- **ISSUES AND CHALLENGES CONT.**
 - Launching off our SWOT discussion, we will identify what key areas to address as part of our strategic plan.
- **BREAK**
- **ACTION PLANNING**
 - The who, what, where, and when of the planning process.

“Only those who will risk going too far can possibly find out how far one can go.”
— T.S. Eliot

Appendix III: Strategic Plan Agenda with Facilitator Breakdown

Affinity Strategic Planning Agenda

- **Introductions/ Overview of the Day** (5 min)
 - Ice Breaker Activity- favorite summer treat
 - What are we doing here today, and what exactly is this strategic plan thingy?
 - Happy Birthday Affinity!
 - March is also National Disability Awareness Month! YouTube video- “Don’t Limit Me”
 - Go over packet contents- lunch menu to review during break to help with ordering more quickly. Lunch reservation at 12pm, leave at around 11:45a.
 - Include explanation of strategic planning and how it’s important. What hope to achieve mid-day and by the end of the day.
- **Affinity in Review** (15 min)
 - A look at where we are, where we’ve been, and dreams about where we will go.
 - Discuss past historical events/important moments in Affinity’s history.
 - Visual example of the future, how it’s uncharted and free for us to create.
 - What point on the organizational time line we are. Discuss Organizational Assessment.
 - What are our current programs- Children’s/Adults, HR etc. What are their functions?
 - Who are our stakeholders. Who does our org. effect?
 - Clients
 - Partner organizations?
 - Competitors?
- **Vision, Mission, and Values Update**(60 min)
 - It’s been 10 years since we first created our mission. Does it still apply?
 - Vision exercise: Write a newspaper headline about Affinity in 3 years. Maybe also the opening paragraph or a couple sentences. Groups of 2.
 - Can anyone say our mission (pg. 109 Bryson)? Talk about mismatch between what’s written in our orientation paperwork and on our website as mission statement. Look at our brochure and see if there are any bits of information there.
 - Mission Worksheet- individually then discuss as a group.
 - Does our mission still apply- does it make sense? (Only had one program when it was developed, now have two. Does this impact our mission?)
 - Core values- Wordle or Snow Cards. Individual- 5 words that express our values (5 min).

- **Strengths/Leadership discussion** (15 min)
 - Ted Talk video- How to start a movement.
 - Conversation on Affinity's culture. Organizational Assessment- talk about staff and management responses to surveys.
 - Organizational capacity tool- discuss findings (adaptive capacity received lowest score).
- **BREAK** (10 min)
- **SWOT** (30min)
 - A discussion of our key areas of strength and areas of improvement.
 - Small group works then rejoin as team (groups of 3) Use handouts.
 - Pg. 51 Barry and pg. 123-135 Bryson for examples
 - External and Internal environment
 - Talk about the competitors (maybe look at list on DHHS site?)
 - Be sure to discuss individual education and backgrounds as part of strengths. Anne getting her MSW, Katie pursuing Therapeutic Recreation certification, Amanda getting her BcBA. What Denae's departure means.
 - Compare/ reflect on vision/mission discussion and if it relates to SWOT.
- **Key Issues and Challenges** (15 min)
 - How many years do we want the plan to cover? 2,3,5?
 - Identify what we will tackle in the upcoming _ years. Break down by both programs and as a whole organization. If needed, this can occur after lunch.
 - Link back to our mission- do these match our mission, vision, and values?
 - Use snow cards to identify top priorities- small groups
- **11:45 LUNCH** (1 hour)
- **Issues and Challenges Cont.** (30 min)
 - Launching off our SWOT discussion, we will identify what key areas to address as part of our strategic plan.
 - Review issues and challenges.
 - Break down by importance and agree upon which ones to address now, later, and far future. Ideally create up to 5 "problem" areas to focus on.
 - Strategic Plan examples for a couple of organizations.
- **BREAK** (5 min)
- **Action Planning** (remainder of day) p. 135-163 Bryson
 - The who, what, where, and when of the planning process.
 - We will break down the process of achieving the goals we have agreed upon and assign responsible parties for getting the ball rolling.
 - Measureable goals, who is responsible.
 - How will we know when we've met these goals?
 - Next steps: Assess where we are, assign responsibilities for these next steps. Follow up at team.

Appendix IV: SWOT Matrix Worksheet

SWOT Matrix

	HELPFUL (for your objective)	HARMFUL (for your objective)
INTERNAL (within organisation)	Strengths • _____ • _____ • _____ • _____ • _____ S	Weaknesses • _____ • _____ • _____ • _____ • _____ W
EXTERNAL (outside organisation)	Opportunities • _____ • _____ • _____ • _____ • _____ O	Threats • _____ • _____ • _____ • _____ • _____ T

*Internal Environment:
Staff, programs,
program outcomes,
training procedures,
financial situation,
reputation etc.*

*External Environment:
Customers and other
stakeholders,
competitors and allies,
social, political, and
technical forces etc.*

Appendix V: Mission Statement Questions

Mission Statement Questions:

1. What does our current mission say about who we are, what our purpose is, what business we are in, whom we serve, and how we are unique?
2. In general, what are the basic social and political needs we exist to fill? Or, what are the basic social or political problems we exist to address?
3. What is our role in filling these needs or addressing these problems? How does our organization differ from these organizations?
4. In general, what do we want to do to recognize or anticipate and respond to these needs or problems?
5. What changes to the mission would I propose?

Examples:

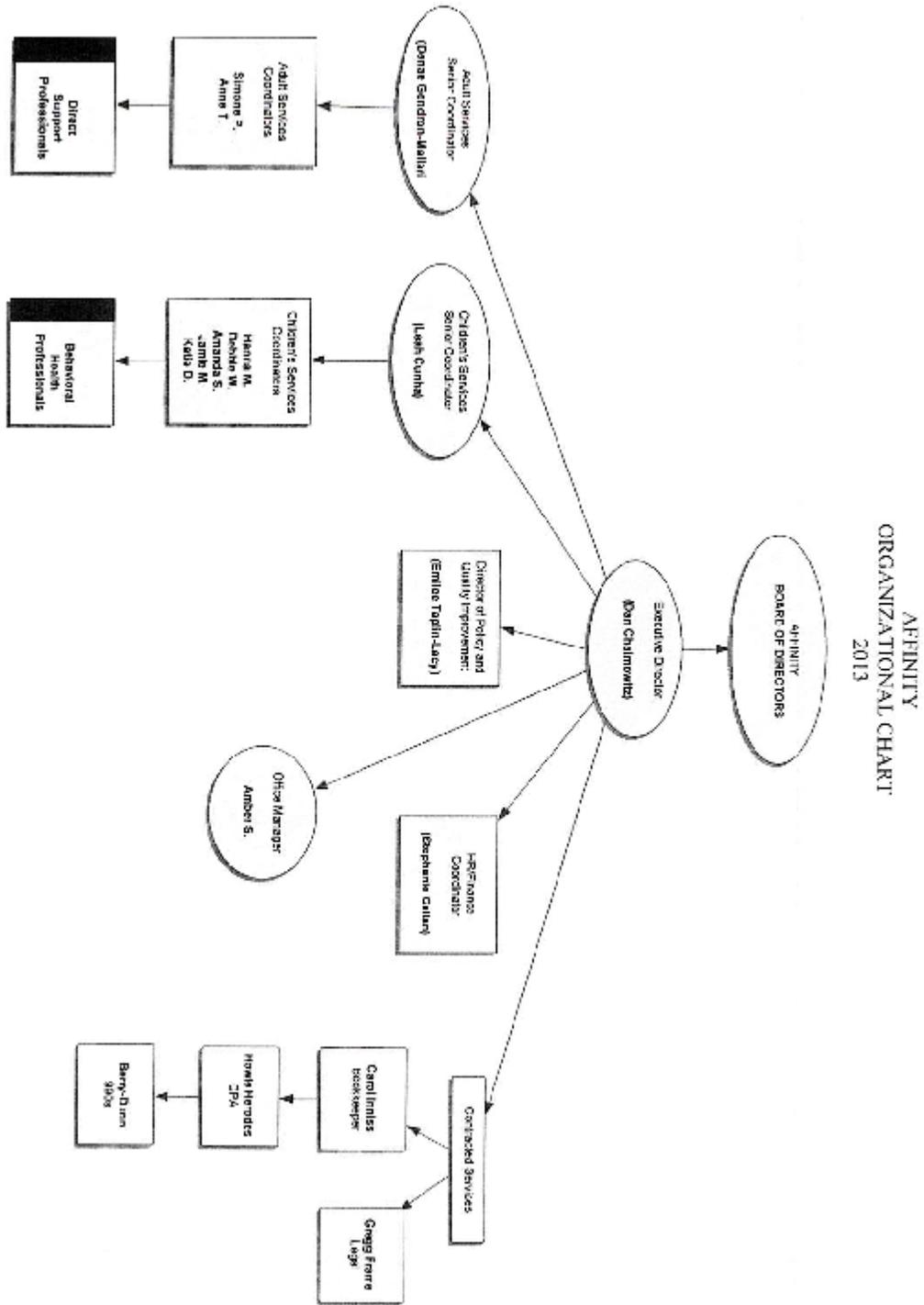
Woodfords- “Woodfords family services is committed to the support and inclusion of people with special needs and their families in Maine communities.”

CAFÉ- “The focus of CAFE is to provide personalized community based services to people with developmental disabilities. We see a whole universe and all of its possibilities in the eyes of each person we meet. We focus on the wants, wishes, and desires of each individual. We start with the person and build the program around them. CAFE provides a setting where essential lifestyle choices are met. Choice is a very important word at CAFE. People do not have to conform to a setting which they do not fit. CAFE helps people discover their choices and then helps to have their choices honored. The focus is not on changing people, but on understanding them.”

Connections For Kids: “Connections For Kids creates better futures for children and families. We specialize in developing helpful relationships, building client strengths, and using treatment and education that works. CFK engages children, youth and families in healthy activities and educational programs.”

Creative Trails- “We offer participants sophisticated opportunities, choices and integration to help support and guide them to becoming more independent. By realizing their potential through experiences of the mind, body, and spirit each individual will live a more meaningful and fulfilling life.”

Appendix VI: Organizational Chart



Appendix VI: Vision Statement Wordle

Appendix VIII: References

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