

## FRAMEWORK FOR EVALUATING PROGRESS ON A STRATEGIC PLAN

**Timeframe:** The body responsible for evaluating progress towards implementation of the strategic plan and making changes as needed should check progress quarterly and do a full evaluation annually. A good strategic plan *will evolve* as it is implemented. Changes are desirable if they reflect a healthy process of prioritizing goals based on experience.

**Collecting the Information:** If using a tracking matrix, based on the strategic plan, begin by filling in the “activity status” column in that matrix (see template) to provide clear information about what has and has not been accomplished. Add any additional activities taken on since the plan was created in the “unpredicted demands and new activities” section of each program area. If you don’t have this base to work from, start by creating a basic list of goals and accomplishments.

**Evaluation:** Below are questions that can be used, as they are applicable, for evaluation.

- How are we doing overall on the goals we set for the year (how much of what we said we wanted to do have we been able to do)?
- Were we too ambitious at the beginning?
- What are the things that were not in the original work goals that have taken significant time this year? (Make sure they are integrated into revised work goals and/or next year’s goals, if they are still happening.)
- Were we able to raise the funds we needed? Why or why not? What do we know about funding possibilities for these activities or core functions in the future?
- Did we get the volunteer support we needed to accomplish our goals? Why (what worked well) or why not?
- Were there other unpredicted factors that made it easier or harder to meet our goals?
- What parts of the systems we put in place to implement this plan worked well?
- Did the systems evolve over the course of plan implementation? In what ways?
- Are there parts of the project’s structure/systems that have not worked the way we thought they would, or that have in some way made it more difficult for us to accomplish what we said we wanted to accomplish? (If so, what needs to change and how do we accomplish that?)
- What factors have changed in the environment that need to be reflected in our work goals?

**Next Steps:** Answering whatever of these questions are relevant will provide a good sense of where you are in meeting your goals and what factors have led to those outcomes. This should enable you to celebrate your accomplishments, and to make any mid-course

corrections you need to if this is a mid-year evaluation or to make good decisions about the coming year's work plan in the case of an end-of-year evaluation.