

Appendix B: Strategic Planning Phases and Implementation

Oregon Volunteers Strategic Planning Process:

1. Leadership Development: Establish Commissioner commitment to financial wellbeing of Oregon Volunteers
 - a. What will the Commissioner level of involvement be?
 - b. What amount of time and energy can/will commissioners put into this?
 - c. Given commissioner levels of involvement, time, and energy input, how much fund development work is possible?
2. Review and evaluate case scenarios and corresponding strategic processes to identify the most realistic and beneficial strategy.
 - a. Scenario 1: Legislative outreach and advocacy for state level governmental funding
 - b. Scenario 2: Nonprofit and 501c3 application for fund development
 - c. Scenario 3: Fiscal Sponsorship for project specific fund development
3. Organizational Capacity Assessment (Staff time, resources, and dollars)
 - a. Commissioners & Executive Directors complete the McKinsey Capacity Assessment Grid
 - b. Review organizational capacity gaps and determine how these will affect current organizational goals and strategic plans
 - c. Where necessary, realign strategies and goals to accommodate organizational capacity limitations

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Strategies broken into 3-month phases to assist with task management based on organizational capacity

Strategy	Phase 1: 3 months	Phase 2: 6 months	Phase 3: 1 year
4.1 Develop and implement a strategic fund development strategy with outside support for Oregon Volunteers! and AmeriCorps.	<ol style="list-style-type: none"> 1. Establish Commissioner commitment to financial wellbeing of Oregon Volunteers 2. Capacity Assessment (Staff time, resources, and dollars) 3. Review and evaluate case scenarios 4. Conduct any necessary additional research 	<ol style="list-style-type: none"> 1. Leadership Decides on strategies to implement 2. Set clear, specific goals 3. Review and adjust Capacity Assessment (Staff time, resources, and dollars) 4. Develop implementation plan, time line, & evaluation method 	<ol style="list-style-type: none"> 1. Implementation plan is underway 2. Monitor and Evaluate strategic efforts 3. Review and evaluate commissioner leadership and involvement
4.2 Develop plan to build strong relationships with elected officials and National Service Family	<ol style="list-style-type: none"> 1. Establish Commissioner commitment to financial wellbeing of Oregon Volunteers 2. Capacity Assessment (Staff time, resources, and dollars) 3. Review and evaluate case scenario 4. Conduct any necessary additional research 	<ol style="list-style-type: none"> 1. Leadership Decides on strategies to implement 2. Set clear, specific goals 3. Review and adjust Capacity Assessment (Staff time, resources, and dollars) 4. Develop implementation plan, time line, & evaluation method 	<ol style="list-style-type: none"> 1. Implementation plan is underway 2. Monitor and Evaluate strategic efforts 3. Review and evaluate commissioner leadership and involvement
4.3 Complete an Organizational Capacity Assessment to determine what strategic goals, planning, and implementation work is possible	<ol style="list-style-type: none"> 1. Commissioners & Executive Directors complete an initial Capacity Assessment 2. Review organizational capacity gaps and determine how these will affect current organizational goals and strategic plans 3. Where necessary, realign strategies and goals to accommodate organizational capacity limitations 	<ol style="list-style-type: none"> 1. Maintain capacity building efforts 2. Monitor and evaluate capacity building efforts 	<ol style="list-style-type: none"> 1. Commissioners & Executive Directors complete a second organizational Capacity Assessment to see where progress has been made and what remains to do 2. Review organizational capacity gaps and determine how these will affect current organizational goals and strategic plans 3. Where necessary, realign strategies and goals to accommodate organizational capacity limitations

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This part of the plan to be set by Oregon Volunteers based on selection of a scenario:

Strategy	Year 1	Year 2	Year 3
4.1 Develop and implement a strategic fund development strategy with outside support for Oregon Volunteers! and AmeriCorps.			
4.2 Develop plan to build strong relationships with elected officials and National Service Family			
4.3 Complete an Organizational Capacity Assessment to determine what strategic goals, planning, and implementation work is possible			

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Strategy	Task	Responsibility		
Strategy 1: Leadership Development		Commissioners	Executive Director	Volunteers & Interns
	Establish Commissioner commitment to financial wellbeing of Oregon Volunteers	X	X	
	Create a Fund Development Committee	X	X	
	Recruit high skill-level volunteers for the fund development committee		X	
	Educate, involve and Empower the Fund Development Committee members to establish, lead, and implement fund development plans	X	X	X
	Review and evaluate fund development activity	X	X	X
Strategy 2a: Legislative Support & Advocacy Development		Commissioners	Executive Director	Volunteers & Interns
	Establish Commissioner commitment to Legislative relationship building for the increased financial wellbeing of Oregon Volunteers	X	X	
	Identify critical strategic legislators and legislative processes to create an on-going advocacy plan	X	X	X
	Recruit high skill-level volunteers for legislative outreach	X	X	
	Create a legislative outreach communication plan	X	X	X
	Educate and involve community partners, organizations and stakeholders in on-going legislative outreach	X	X	X
	Monitor and evaluate legislative outreach and advocacy efforts	X	X	X

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Strategy 2b: 501(C)3 Application & Fund Development For 501(C)3		Commissioners	Executive Director	Volunteers & Interns	
	Establish Commissioner commitment to fund development in order to conduct fund development for the increased financial wellbeing of Oregon Volunteers.	X	X		
	Review nonprofit classification options and decide which option to pursue	X	X		
	Committee to create – timeline - application and gather necessary resources and submit application	X	X	X	
	Set clear and achievable goals for fund raising	X	X		
	Identify and evaluate potential donors	X	X	X	
	Complete the fund development plan based on identified goals and potential funder groups	X	X	X	
	Implement fund development plan		X	X	
	Monitor and evaluate the fund development plan	X	X		
Strategy 2c: Fiscal Sponsorship		Commissioners	Executive Director	Fiscal Sponsor	Volunteers & Interns
	Establish Commissioner commitment to fiscal sponsorship for the increased financial wellbeing of Oregon Volunteers	X	X		
	Identify potential fiscal sponsors with compatible mission & purpose Ie. NOVAA, Hands on Portland, NAO	X	X		
	Create preliminary proposal and approach potential sponsors	X	X		
	Research legal options and requirements	X	X		
	Negotiate fiscal sponsor agreement <ul style="list-style-type: none">decide on the type of sponsorship: project, contractor, granteeobtain legal assistance	X	X		
	Complete and submit paperwork and agreements	X	X		
	Implement sponsorship project agreements	X	X	X	X
	Monitor & Evaluate project	X	X	X	X
Strategy 3: Capacity Assessment		Commissioners	Executive Director	Volunteers & Interns	
	Complete the McKinsey Capacity Assessment Grid	X	X		
	Review organizational capacity gaps and determine how these will affect current organizational goals and strategic plans	X	X		
	Where necessary, realign strategies and goals to accommodate organizational capacity limitations	X	X		