Create Your Road Map

Part 2: Getting your team on board with your road map and turning goals into action plans to create results with less stress
What we will cover today:

• Communicating with your whole team about your mission and road map.

• Turning goals into action plans – for departments and individuals – to create results with less stress.

Next week’s webinar:
Eliminate bottlenecks to get important work done with greater ease AND create a united team.
Create Your Road Map

Quick Poll

Do your team members (board members, staff, key volunteers) know your mission?

- All or most
- Some
- Few
- Not sure
Gallup study on the American workplace:

- Two-thirds are disengaged at work, or worse.
- 51% of full-time employees feel no real connection to their job and don’t give it their all.
- An additional 16% are “actively disengaged.”
Create Your Road Map

Stanford survey of nonprofit board members

• 27%—colleagues lack understanding of organization’s mission and strategy

• Over 50%—colleagues lack understanding of their own roles and responsibilities
“The main thing is to keep the main thing the main thing.”
– Steven Covey
Create Your Road Map

Ways to communicate your mission:

- Part of orientation for new staff, volunteers, board members
- Routine all staff meetings
- Smaller team meetings
- Posting where regularly visible
- In regular messaging (online and other communications)
- In email signatures, news releases
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Ways to get and keep your mission front and center:

• Include in two-way discussions as well as presentations
• Tie every single job back to the mission
• Share stories that illustrate the mission
• Encourage the team to share actions of co-workers that show the mission in action
• Repeat many times
• Use multiple strategies
Has your organization had an action plan before?

- Yes and it worked for us
- Yes, but wasn’t used
- No or not sure
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“A goal without a plan is just a wish.”

— Antoine de Saint-Exupéry
Create Your Road Map

Turn Your Organization’s Goals into an Action Plan

Creating an action plan can:

- Enable you to create results with less stress
- Get your team pulling in the same direction
Create Your Road Map

Creating Your Action Plan

Lower tech or higher tech? Which is right for your team?

Low-tech options:
- Worksheets
- Documents you create
- Forms found online

High-tech options:
- Trello
- Asana
- Many others
### Create Your Road Map

#### Organization Action Plan

#### Sample 1

### Road Map Planning Worksheet

**Part 2: Action Planning for your Organization**

**EXAMPLE 1: Humane Society**

<table>
<thead>
<tr>
<th>Organization Name:</th>
<th>Humane Society of Greater Gotham</th>
<th>Plan Date:</th>
<th>January 20, 2021</th>
</tr>
</thead>
</table>

**Mission Statement:**

“To bring people and animals together to create a no-kill community in Davis County. We provide shelter and care to homeless pets, low-cost spay/neuter, and pet adoption services for the community to help create a lifesaving safety net for every homeless dog and cat in our community.”

**Assignments for Goals:**

**Goal 1:** [letter goal]
- Increase foster homes to foster 20% more kittens in 2021 over 2020.

**How you plan to achieve Goal 1:**
- Recruit new foster caregivers
- Retain foster caregivers

**Leadership team lead for this goal:** Operations Director
- "p" = person overseeing task, "v" = team member

<table>
<thead>
<tr>
<th>Departments or individual names</th>
<th>Foster care coordinator</th>
<th>Cat Care manager</th>
<th>Adoption manager</th>
<th>Marketing manager</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>&quot;p&quot; expand survey focus group</td>
<td>&quot;v&quot; identify issues and best practices</td>
<td>&quot;v&quot; develop marketing plan, ensure approved plan</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
</tr>
<tr>
<td></td>
<td>&quot;v&quot; review all processes</td>
<td>&quot;v&quot; work with veterinary team to update support protocols</td>
<td>&quot;v&quot; track program and assess success with Operations Director</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
</tr>
<tr>
<td></td>
<td>&quot;v&quot; foster care procedures and track updates</td>
<td>&quot;v&quot; work with veterinary team to update support protocols</td>
<td>&quot;v&quot; track program and assess success with Operations Director</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
</tr>
<tr>
<td></td>
<td>&quot;v&quot; foster care recruitment marketing</td>
<td>&quot;v&quot; track program and assess success with Operations Director</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
<td>&quot;v&quot; create support network, &quot;v&quot; social media support</td>
</tr>
<tr>
<td></td>
<td>&quot;v&quot; training for foster caregivers</td>
<td>&quot;v&quot; track program and assess success with Operations Director</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
<td>&quot;v&quot; create support network, &quot;v&quot; social media support</td>
</tr>
<tr>
<td></td>
<td>&quot;v&quot; support system for foster caregivers</td>
<td>&quot;v&quot; track program and assess success with Operations Director</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
<td>&quot;v&quot; create support network, &quot;v&quot; social media support</td>
</tr>
<tr>
<td></td>
<td>&quot;v&quot; appreciation for foster caregivers</td>
<td>&quot;v&quot; track program and assess success with Operations Director</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
<td>&quot;v&quot; create support network, &quot;v&quot; social media support</td>
</tr>
<tr>
<td></td>
<td>&quot;v&quot; assessment</td>
<td>&quot;v&quot; track program and assess success with Operations Director</td>
<td>&quot;p&quot; create support network, &quot;v&quot; social media support</td>
<td>&quot;v&quot; create support network, &quot;v&quot; social media support</td>
</tr>
</tbody>
</table>
### Road Map Planning Worksheet

**Part 2**

**Action Planning for your Organization**

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</table>

**Mission Statement:**

“To bring people and animals together to create a no-kill community in Davis County. We provide shelter and care to homeless pets, low-cost spay/neuter, and pet adoption services for the community to help create a lifesaving safety net for every homeless dog and cat in our community.”

**Assignments for Goals:**

**Goal 1:** (Enter Goal)
- Increase foster homes to foster 20% more kittens in 2021 over 2020.

**How you plan to achieve Goal 1:**
- Recruit new foster caregivers
- Retain foster caregivers

**Leadership team lead for this goal:** Operations Director

\( \checkmark \) = person overseeing task, \( \checkmark \) = team member
## Create Your Road Map

**Organization Action Plan - Sample 1**

<table>
<thead>
<tr>
<th>Departments or Individuals names:</th>
<th>Foster care coordinator</th>
<th>Cat Care manager</th>
<th>Adoption manager</th>
<th>Marketing manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>List below high level department objectives to be accomplished within one year.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gain an understanding of foster caregivers’ opinions and preferences</td>
<td>✓ conduct survey or focus groups</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review foster care processes and make updates</td>
<td>✓ review all processes identify issues and bottlenecks, revise</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Foster caregiver recruitment marketing</td>
<td>✓</td>
<td></td>
<td>✓ develop marketing plan, execute approved plan</td>
<td></td>
</tr>
<tr>
<td>Training for foster caregivers</td>
<td>✓ create/update foster care training program</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Support system for foster caregivers: veterinary care</td>
<td>✓ work with veterinary team to update support processes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support system for foster caregivers: peer to peer</td>
<td>✓ create support network</td>
<td></td>
<td>✓ social media support</td>
<td></td>
</tr>
<tr>
<td>Appreciation for foster caregivers</td>
<td>✓ create an appreciation plan, execute plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assessment</td>
<td>✓ track progress and assess success with Operations Director</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
Create Your Road Map

Organization Action Plan - Sample 2 – Page 1

Road Map Planning Worksheet

Part 2

Action Planning for your Organization

Example 2: Rescue Group

---

<table>
<thead>
<tr>
<th>Organization Name:</th>
<th>Plan Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loving Hearts Rescue</td>
<td>January 20, 2021</td>
</tr>
</tbody>
</table>

Mission Statement:
“To save and protect animals, to provide care and treatment, to advocate for their welfare and to enhance the human-animal bond.”

Assignments for Goals:

Goal 1: (Enter Goal)

- Increase the total number of volunteer hours for 2021 by 25% over what was worked in 2020.

How you plan to achieve Goal 1:

- Attract new volunteers
- Create a structure for empowering volunteers

Leadership team lead for this goal: Joanne
X Assist
## Create Your Road Map

### Organization Action Plan - Sample 2 – Page 2

<table>
<thead>
<tr>
<th>Departments or Individuals names:</th>
<th>Wanda - volunteer coordination</th>
<th>Robert - outreach &amp; social media</th>
<th>Lola - animal care</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>List below high level department objectives to be accomplished within one year.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify areas where we could use more volunteer help</td>
<td>Develop job descriptions</td>
<td>x</td>
<td>x</td>
<td>All other key team members to give input</td>
</tr>
<tr>
<td>Plan training and mentorship for volunteers</td>
<td>Work with the leader for key person leading each new volunteer group</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Recruit new volunteers</td>
<td>Assist with posting to local volunteer networks</td>
<td>Develop a plan to attract new volunteers using social media as well as conventional media</td>
<td></td>
<td>Everyone will help</td>
</tr>
<tr>
<td>Managing problem volunteers</td>
<td>Discuss plan with Joanne</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retain volunteers</td>
<td>Figure out how we can retain good volunteers - develop a plan that we can execute</td>
<td></td>
<td>Everyone will help</td>
<td></td>
</tr>
<tr>
<td>Assessment</td>
<td>Determine how we will monitor progress and assess success working with Joanne</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create Your Road Map

Creating Individual, Team and Department Action Plans
How to create plans for each department, team and person.

Engage them in creating their own plans
# Road Map Planning Worksheet

## Part 2
Action Planning for Individuals or Departments

### EXAMPLE 1: Humane Society

<table>
<thead>
<tr>
<th>Individual or Department Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Person or Department: Foster Care Coordination Team – lead coordinator: Marilyn Smith</td>
</tr>
</tbody>
</table>

Mission Statement:
“To bring people and animals together to create a no-kill community in Davis County. We provide shelter and care to homeless pets, low-cost spay/neuter, and pet adoption services for the community to help create a lifesaving safety net for every homeless dog and cat in our community.”

<table>
<thead>
<tr>
<th>Review Dates</th>
<th>Progress Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan creation</td>
<td>January 28, 2021</td>
</tr>
<tr>
<td>3 month review</td>
<td>April 30, 2021</td>
</tr>
<tr>
<td>6 month review</td>
<td>July 28, 2021</td>
</tr>
<tr>
<td>9 month review</td>
<td>October 29, 2021</td>
</tr>
<tr>
<td>Completion</td>
<td>December 31, 2021</td>
</tr>
</tbody>
</table>
Create Your Road Map

Individual or Department Action Plan - Sample 1 – Pages 2 & 3

<table>
<thead>
<tr>
<th>Actions</th>
<th>Start date</th>
<th>End date</th>
<th>Notes</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct foster caregiver survey (A)</td>
<td>1/25</td>
<td>2/15</td>
<td>Include what works well, challenges/concerns, preferences. Analyze information, share results</td>
<td>Started</td>
</tr>
<tr>
<td>Review &amp; update foster care processes (B)</td>
<td>1/25</td>
<td>2/28</td>
<td>Including related animal care processes, such as tracking, vet care needed, after hour emergencies, etc. and after hour emergency contact</td>
<td></td>
</tr>
<tr>
<td>Support development of marketing plan (C)</td>
<td>3/15</td>
<td>3/28</td>
<td>Work with marketing manager</td>
<td></td>
</tr>
<tr>
<td>Update training program (D)</td>
<td>3/10</td>
<td>3/30</td>
<td>Develop a mentoring program for caregivers – work with foster care assistants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2/10</td>
<td>3/10</td>
<td>Update the training program– work with foster care assistants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3/10</td>
<td>3/30</td>
<td>Create a training video to be watched remotely</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2/1</td>
<td>2/30</td>
<td>Update manual– work with animal care and foster care assistants</td>
<td></td>
</tr>
<tr>
<td>Create support system: vet care (E)</td>
<td>2/1</td>
<td>2/28</td>
<td>Work with vets and animal care mgr. to develop updates processes for accessing services in orderly, timely manner</td>
<td></td>
</tr>
<tr>
<td>Create support system: peer to peer (F)</td>
<td>3/1</td>
<td>3/10</td>
<td>Create a special Facebook page for the foster caregivers and mentors – work with marketing team to create</td>
<td></td>
</tr>
<tr>
<td>Develop appreciation plan for foster caregivers (G)</td>
<td>3/20</td>
<td>4/20</td>
<td>Develop a plan to share goals, celebrate team successes and express personal thanks to caregivers – work with foster care assistants</td>
<td></td>
</tr>
<tr>
<td>Assess progress(H)</td>
<td>2/1</td>
<td>2/15</td>
<td>Create tracking sheet showing last year and this year’s data for recruitment and for animals fostered. Establish target goals for each month</td>
<td></td>
</tr>
</tbody>
</table>

Outcomes:
Road Map Planning Worksheet

Part 2
Action Planning for Individuals or Departments
EXAMPLE 2: Rescue Group

<table>
<thead>
<tr>
<th>Individual or Department Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Person or Department:</td>
</tr>
<tr>
<td>Wanda S. - Volunteer Coordination</td>
</tr>
<tr>
<td>Mission Statement:</td>
</tr>
<tr>
<td>“To save and protect animals, to provide care and treatment, to advocate for their welfare and to enhance the human-animal bond.”</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Review Dates</th>
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</tr>
<tr>
<td>9 month review</td>
<td>October 30, 2021</td>
</tr>
<tr>
<td>Completion</td>
<td>January 31, 2022</td>
</tr>
</tbody>
</table>
# Create Your Road Map

## Individual or Department Action Plan – Sample 2 – Pages 2 & 3

<table>
<thead>
<tr>
<th>Goal 1: (Enter Goal)</th>
<th>Increase the total number of volunteer hours for 2021 by 25% over what was worked in 2020.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Our Objective, Action or Project</strong></td>
<td>Identify areas where we could use more volunteer help</td>
</tr>
<tr>
<td></td>
<td>Plan training and mentorship for volunteers</td>
</tr>
<tr>
<td></td>
<td>Recruit new volunteers</td>
</tr>
<tr>
<td></td>
<td>Manage problem volunteers</td>
</tr>
<tr>
<td></td>
<td>Retain volunteers</td>
</tr>
<tr>
<td></td>
<td>Assess progress</td>
</tr>
</tbody>
</table>

**Lead:** Foster Care Coordinator: Wanda  
**Team Members:** Robert, Lola, and other key team members as needed

<table>
<thead>
<tr>
<th>Actions</th>
<th>Start date</th>
<th>End date</th>
<th>Notes</th>
<th>Status</th>
</tr>
</thead>
</table>
| Identify areas where we could use more volunteer help | 1/25 | 2/28 | 1. Get volunteer opportunity list from each program lead including remote volunteering  
2. Group them into categories  
3. Create job descriptions | Underway |
| Plan training and mentorship for volunteers | 1/25 | 3/15 | 1. Select 4 to 6 mentors from current volunteers based on fit for role  
2. Update training for volunteers so can be done via Zoom once a month | Starting next week |
| Recruit new volunteers | 2/15 | ongoing | 1. Work with Robert on plan to recruit volunteers through social media, local new paper and TV  
2. Set budget for boosted posts  
3. Post to local volunteer boards online | |
| Manage problem volunteers | 3/5 | 3/10 | 1. Meet with Joanne to create code of conduct, update volunteer agreement  
2. Discuss plan for reporting & managing any issues | |
| Retain volunteers | 3/1 | 3/30 | 1. Plan focus group of key volunteers and separate one of key program leads to generate ideas to keep volunteers happy and engaged  
2. Select 5 ideas from the list and create a plan to execute those including target dates for each | |
| Assess progress | 1/25 | | 3. Reach out to past and current volunteers to see if we can engage them. | |

**Outcomes**
Create Your Road Map

How to keep the action plans alive – as working, living documents that people use.

• Set periodic review meetings – make them a priority.
• Talk about the goals and actions.
• Encourage people to share progress with the team.
• Reward progress.
Create Your Road Map

Are you comfortable coaching team members?
- Yes, have done so before
- Yes, I think I can do that
- Not sure
- Don’t think so
Create Your Road Map

Coaching Tips

- Create clear goals & action steps
- Help with time management
- Talk about next steps
- Ask questions
- Practice active listening
- Acknowledge effort
- Encourage natural strengths
- Offer strategies for improving
- Follow up, create accountability
- Encourage perseverance
- Celebrate progress
Create Your Road Map

Develop our own skills and partner with others

Leaders develop skills they lack AND they identify and partner with people who have complementary skills.

“The ability to learn is the most important quality a leader can have.”
- Sheryl Sandberg
Create Your Road Map

Keeping your mission the main thing

Your mission has tremendous power to inspire and engage others.

“People are yearning to be asked to use the full measure of their potential for something they care about.”
– Dan Pallotta
You’ll learn how to:

- Assess current work and eliminate bottlenecks to get important work done with greater ease.
- Create a united team.

Create Your Road Map

Next two webinars on Tuning Up Your Organization
Bonney Brown and Diane Blankenburg
858-395-3677  •  info@humanenetwork.org
www.humanenetwork.org

This webinar is made possible by the Petco Foundation.

The Petco Foundation is creating a national lost and found database for pets. Learn more and join the initiative by visiting petcofoundation.org/lostpets
Questions?
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