



## 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

# Create Your Road Map

## 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

# Create Your Road Map



## 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



# Create Your Road Map

**“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





# Create Your Road Map

## 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





# Create Your Road Map

**Quick Poll**



**Has your organization had an action plan before?**

- Yes and it worked for us
- Yes, but wasn't used
- No or not sure

# Create Your Road Map

“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



Organization Name: Humane Society of Greater Gotham	Plan Date: January 20, 2021
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 √ = person overseeing task, ✓ = team member

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

# Create Your Road Map

## Organization Action Plan - Sample 1 – Page 1

### Road Map Planning Worksheet

Part 2

Action Planning for your Organization

EXAMPLE 1: Humane Society

Organization Name: Humane Society of Greater Gotham	Plan Date: January 20, 2021
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: <ul style="list-style-type: none"><li>• Recruit new foster caregivers</li><li>• Retain foster caregivers</li></ul>
Leadership team lead for this goal: Operations Director ✓ = person overseeing task, √ = team member



# Create Your Road Map

## Organization Action Plan - Sample 1 – Page 2

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

# Create Your Road Map

## Organization Action Plan - Sample 2 – Page 1

### Road Map Planning Worksheet

Part 2

Action Planning for your Organization

Example 2: Recue Group

Organization Name:

Loving Hearts Rescue

Plan Date:

January 20, 2021

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

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



# Create Your Road Map

## Creating Individual, Team and Department Action Plans

How to create plans for each department, team and person.

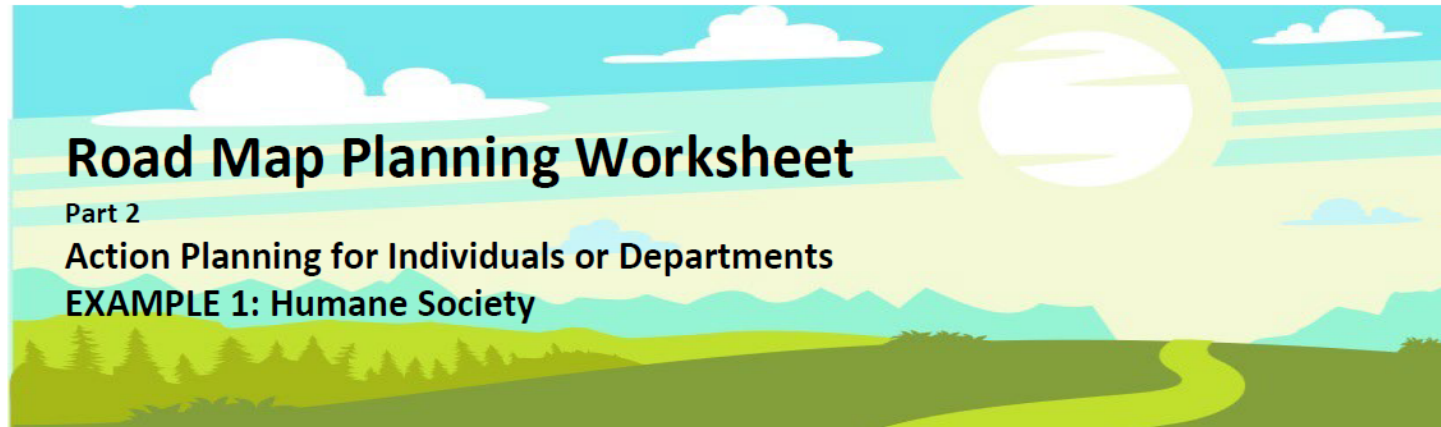


**Engage them in creating  
their own plans**



# Create Your Road Map

## Individual or Department Action Plan - Sample 1 – Page 1



### Individual or Department Action Plan

Name of Person or Department: Foster Care Coordination Team – lead coordinator: Marilyn Smith	
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.”	
Review Dates	Progress Assessment
Plan creation	January 28, 2021
3 month review	April 30, 2021
6 month review	July 28, 2021
9 month review	October 29, 2021
Completion	December 31, 2021

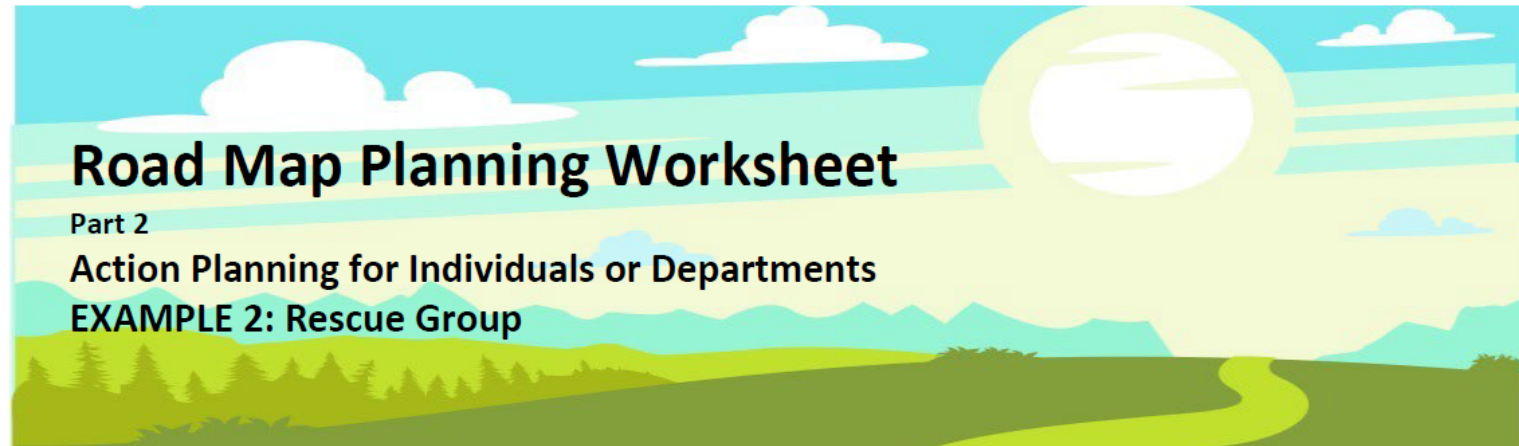
# Create Your Road Map

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

Goal 1: (Enter Goal) Increase foster homes to foster 20% more kittens in 2021 over 2020.				
Our Objective, Action or Project A. Gain an understanding of foster caregivers' opinions and preferences B. Review & update foster care processes C. Market to recruit foster caregivers D. Train foster caregivers E. Create support system for foster caregivers: veterinary care F. Create support system for foster caregivers: peer to peer G. Show appreciation for foster caregivers H. Assess progress				
Lead: Foster Care Coordinator: Marilyn Smith				
Team Members: Marketing Manager, Cat Care Manager, Adoption Manager, foster care coordination assistants				
Status labels: started, in progress, on hold, completed. Blank indicates not yet started				
Actions	Start date	End date	Notes	Status
Conduct foster caregiver survey (A)	1/25	2/15	Include what works well, challenges/concerns, preferences. Analyze information; share results	Started
Review & update foster care processes (B)	1/25	2/28	Including related animal care processes, such as tracking, vet care needed, after hour emergencies, etc. and after hour emergency contact.	
Support development of marketing plan (C)			Work with marketing manager	
Update training program (D)	3/15	3/28	Develop a mentoring program for caregivers – work with foster care assistants	
	2/10	3/10	Update the training program– work with foster care assistants	
	3/10	3/30	Create a training video to be watched remotely	
	2/1	2/30	Update manual– work with animal care and foster care assistants	
Create support system: vet care (E )	2/1	228	Work with vets and animal care mgr. to develop updates processes for accessing services in orderly, timely manner	
Create support system: peer to peer (F)	3/1	3/10	Create a special Facebook page for the foster caregivers and mentors – work with marketing team to create	
Develop appreciation plan for foster caregivers (G)	3/20	4/20	Develop a plan to share goals, celebrate team successes and express personal thanks to caregivers – work with foster care assistants	
Assess progress(H)	2/1	2/15	Create tracking sheet showing last year and this year's data for recruitment and for animals fostered. Establish target goals for each month	
Outcomes:				

# Create Your Road Map

## Individual or Department Action Plan - Sample 2 – Page 1



### Road Map Planning Worksheet

Part 2

Action Planning for Individuals or Departments

EXAMPLE 2: Rescue Group

#### Individual or Department Action Plan

Name of Person or Department: Wanda S. - Volunteer Coordination	
Mission Statement: "To save and protect animals, to provide care and treatment, to advocate for their welfare and to enhance the human-animal bond."	
Review Dates	Progress Assessment
Plan creation	January 28, 2021
3 month review	April 30, 2021
6 month review	July 28, 2021
9 month review	October 30, 2021
Completion	January 31, 2022



# Create Your Road Map

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

<b>Goal 1: (Enter Goal)</b> Increase the total number of volunteer hours for 2021 by 25% over what was worked in 2020.				
<b>Our Objective, Action or Project</b> Identify areas where we could use more volunteer help Plan training and mentorship for volunteers Recruit new volunteers Manage problem volunteers Retain volunteers Assess progress				
<b>Lead:</b> Foster Care Coordinator: Wanda <b>Team Members:</b> Robert, Lola, and other key team members as needed				
Actions	Start date	End date	Notes	Status
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 these including target dates for each.	
			3. Reach out to past and current volunteers to see if we can engage them.	
Assess progress	1/25		1. Determine exact goal hours to hit 25% increase. Determine number of volunteers needed and set target recruitment goals for new volunteers 2. Create spread sheet with goals for each month for volunteer hours worked. 3. Share goal and progress with volunteers.	
<b>Outcomes</b>				

# 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

**Quick Poll**



**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



# Create Your Road Map

## Next two webinars on Tuning Up Your Organization

You'll learn how to:

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







**Bonney Brown and Diane Blankenburg**

**858-395-3677 ♦ [info@humanenetwork.org](mailto:info@humanenetwork.org)**

**[www.humanenetwork.org](http://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](http://petcofoundation.org/lostpets)



# Questions?





**Bonney Brown and Diane Blankenburg**

**858-395-3677 ♦ [info@humanenetwork.org](mailto:info@humanenetwork.org)**

**[www.humanenetwork.org](http://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](http://petcofoundation.org/lostpets)