



Where the **Power of Business**
Meets the **Passion of Giving**



Strategic and Tactical Outcome Planning

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What is Outcome Planning?



Strategic
Planning



Outcome
Planning

What is a typical Outcome Planning Process?



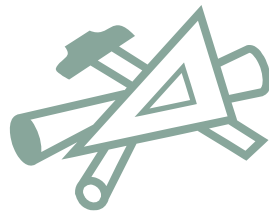
Stakeholder Meetings



Vision & Mission



3 Year Impact



Initiatives



Metrics & Milestones

What is Outcome Planning?

“Define Success Measurably”

- *Quantity*
- *Time*



Step 1: Determine the Outcome

What is 'Success'?

How do you know when you've achieved it?



Example: Baltimore Housing

Determine the Outcome
(Define "Success")



"Outcome" = End Result

- Meaningful Change
- Measurable Change
- Lasting Change

Example: Community Resource Center



Mission:

End hunger

End homelessness

Break the cycle of domestic violence

What is 'Success'?

How do you know when you've achieved it?

Example: CRC's New Mission Statement

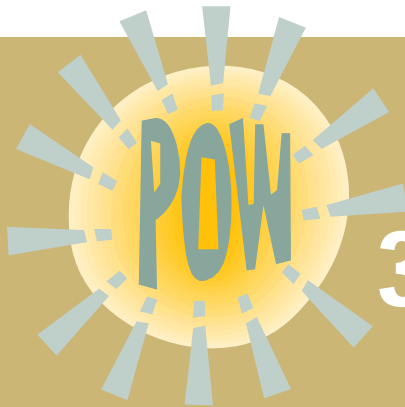


Step 2: Define Your Outcome Measurably



Success = Outcome Measurable by Time and Quantity

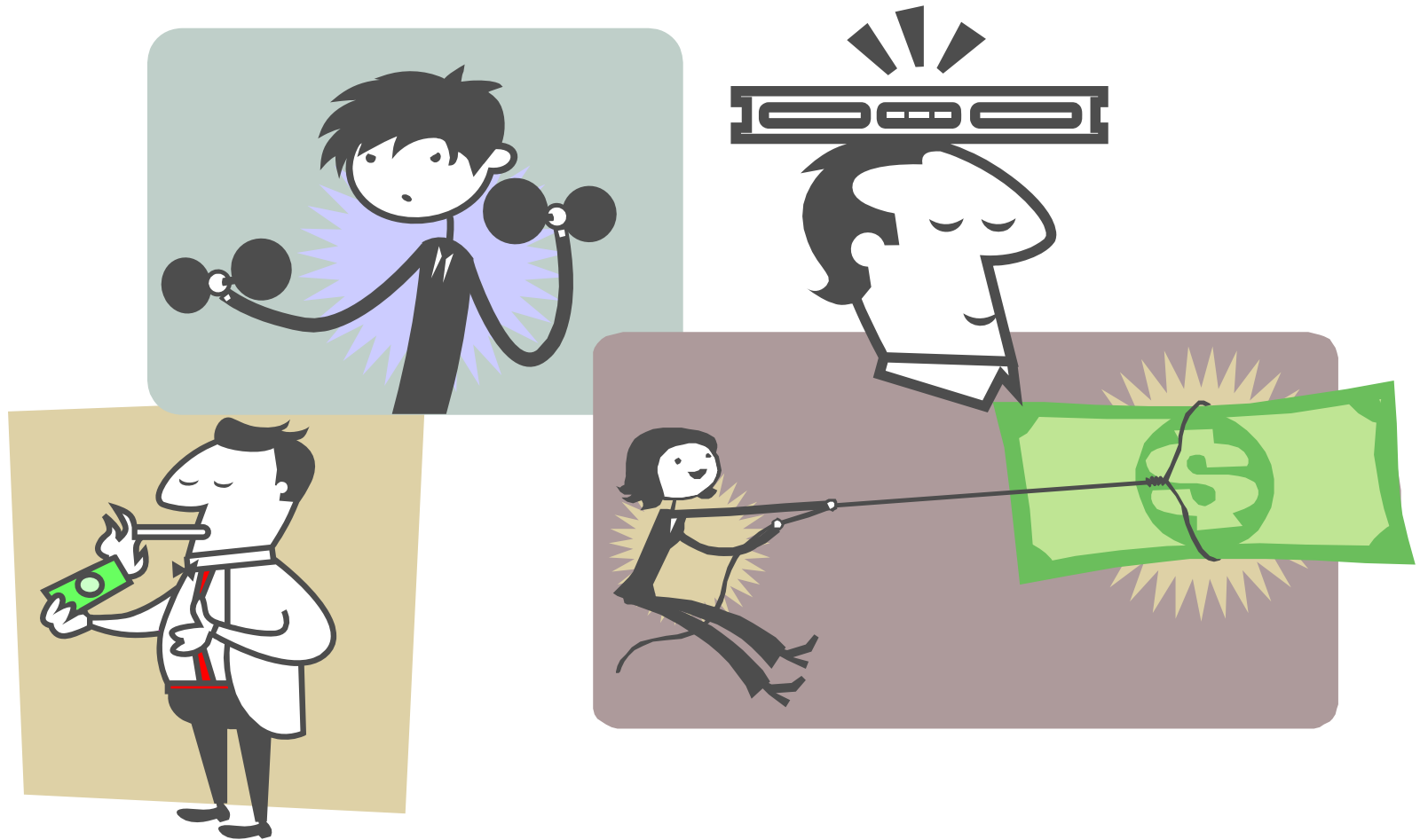
“What amount of change will we create in 3 years?”



3 Year Impact

- 6,800 fed, clothed, and protected
- 3,800 self-sufficient in 18 months

What is the Value of Defining a 3 Year Impact?



Additional Examples



Role Before
Purpose Before



Role After
Success Defined: Impact Statement(s)



Matchmaker
Increase Volunteering



Funder and Matchmaker
\$6MM human capital to 500 social agencies

Technical Advisor
Create Supportive Hsg



Catalyst
250 housed for > 1 Year

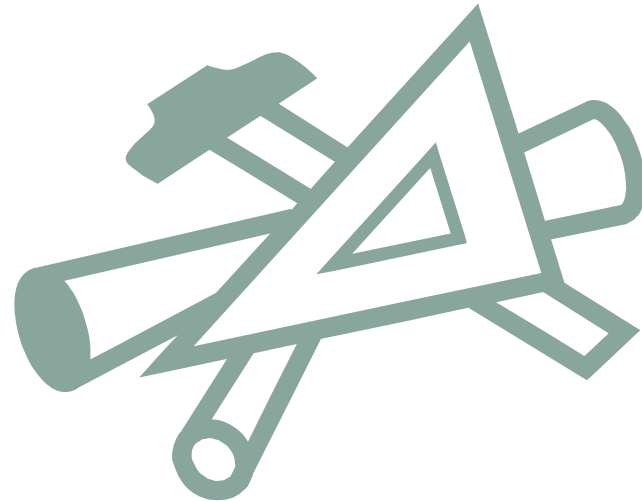
Data Mgr/Publisher
3 Yearly Reports



Research Institute/Policy Advisor
Publicize trends,
Enable regions to set outcome plans

Step 3: Determine Top Initiatives

- “What’s critical to success?”
- “What needs to change?”



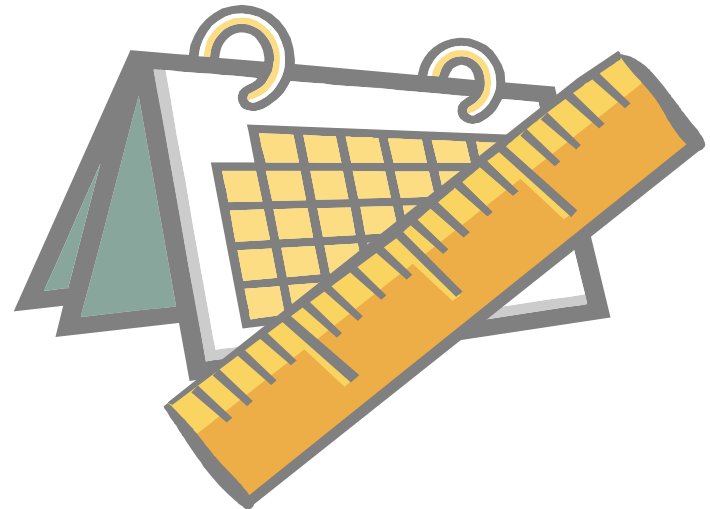
Example: 3 Year Initiatives for CRC



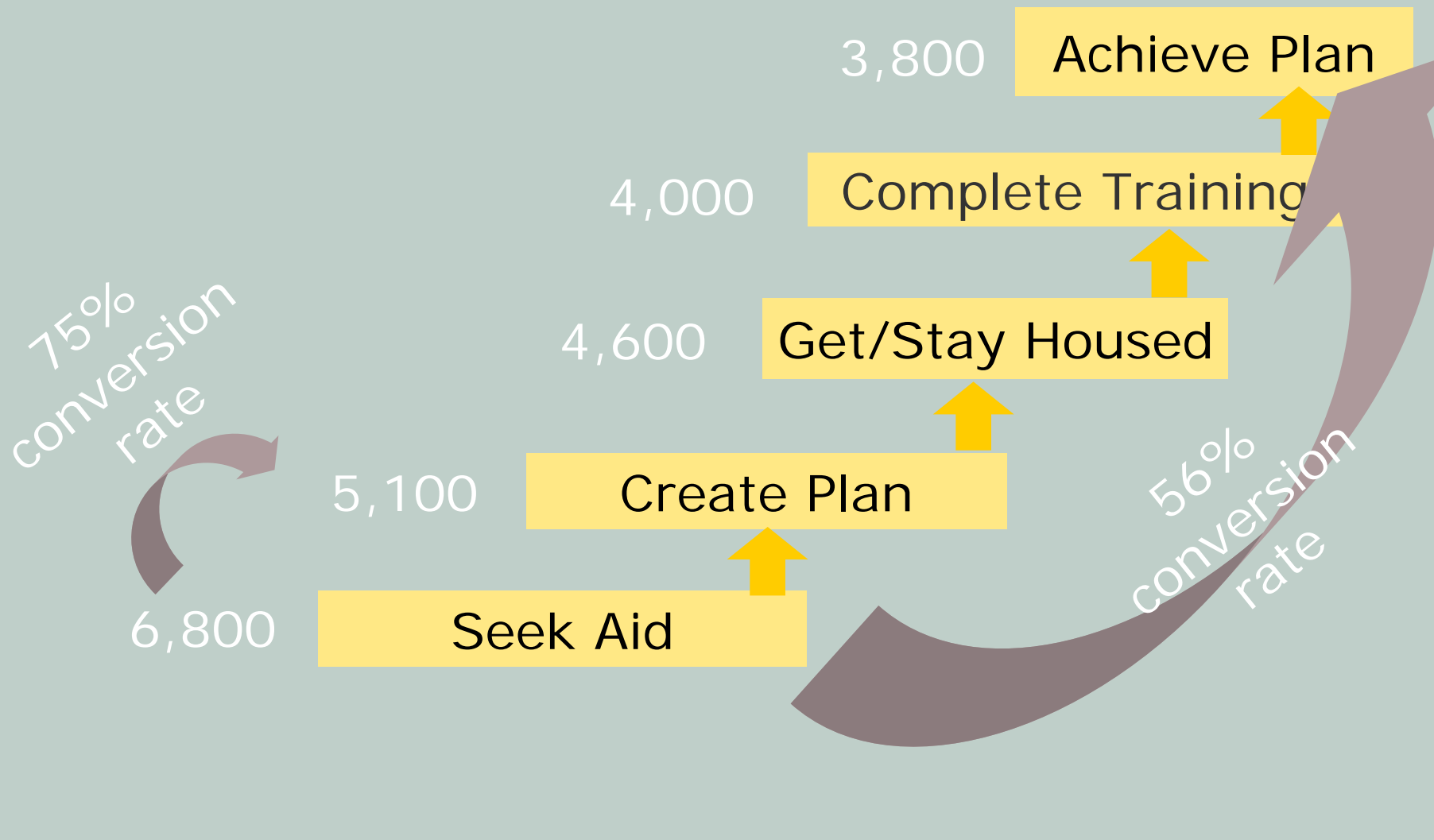
- Enable 3,800 individuals to reach a level of self-sufficiency
 - Enable 5,100 individuals to create personal action plans
- Scale case management process
 - > Recruit and train 50 volunteer case managers
 - > Automate process
- Grow annual funding to \$5.5MM
 - \$X in Government grants
 - \$X in grants of \$100K +
- Build organizational capacity
 - Reposition CRC from “Emergency Aid” to “Self Sufficiency”
 - Establish best practices in compensation, retention, and training

Step 4: Determine Milestones

“What needs to happen by when to know we’ll achieve that top initiative in 3 years?”



Example: Milestones and Metrics



Example: First Year Initiatives for CRC

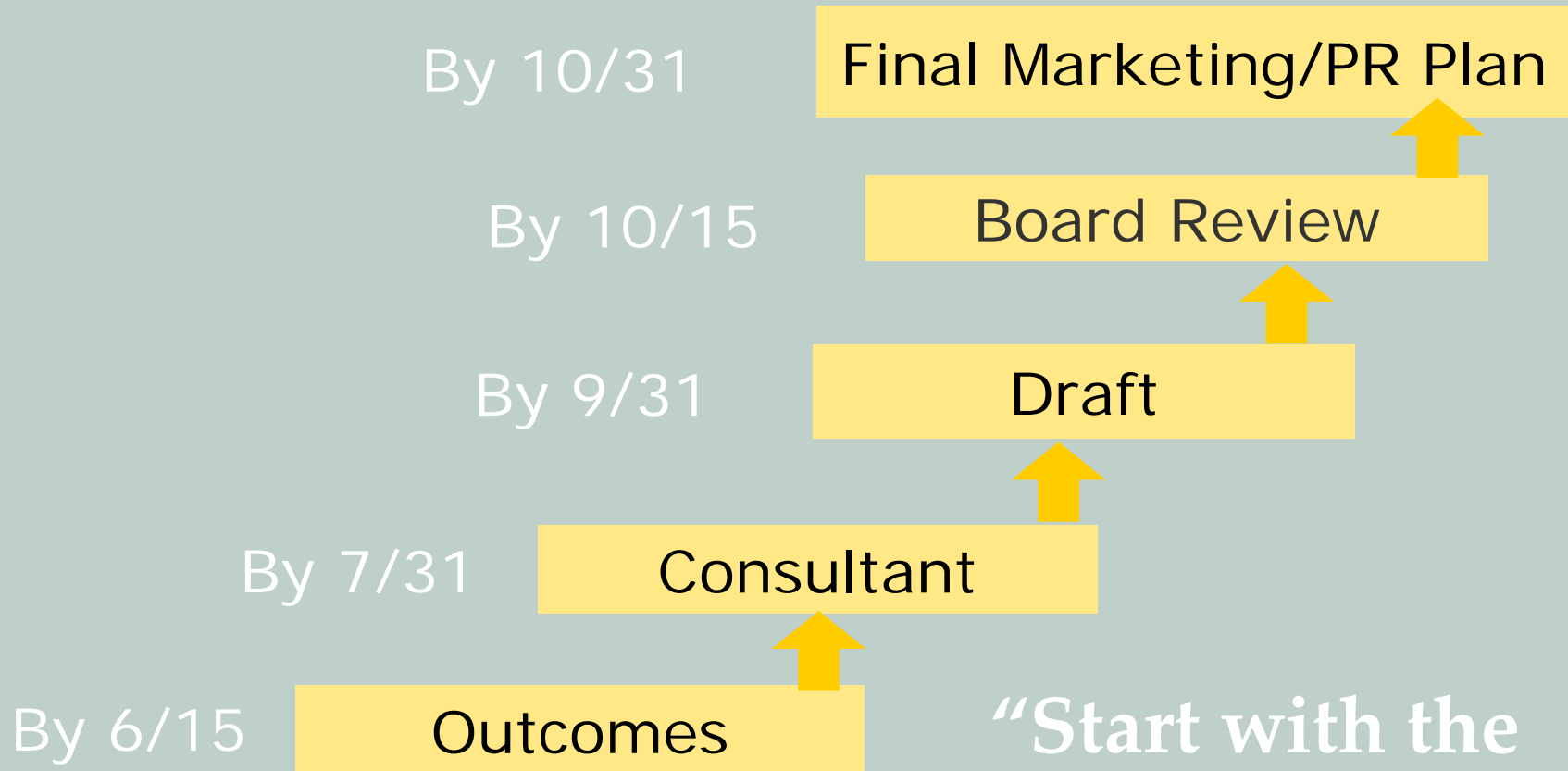


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 - Reposition CRC

Year One:

- Marketing Plan
- Fund Development Plan

Example: Milestones for Year One



“Start with the end in mind”

What does a Final Outcome Plan look like?

Strategic Outcome Plan

Mission

3 Year Impact

3 Year Initiatives

Annual Milestones

Annual Objectives

Quarterly Milestones

Annual Outcome Plan





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Questions? Comments?

Thank You!

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