

STRATEGY

Many ministries are developing new strategy documents and have asked if FM has a preferred template.

No, ministries are free to use whatever format they like, but our experience is that short and concise strategies are more likely to be used as a clear roadmap. They are pinned to walls and reviewed in meetings. Longer strategy documents tend to end up in drawers or in electronic files that are only occasionally referenced.

How concise can a strategy be? One page! Here are two examples. These templates can be used as a complete strategy or as a summary page for a longer strategy.

This documents also provides:

- Definition and examples of the difference between strategic objectives and tactics
- Definition and examples of the difference between Success Measurements and Trending Measurements.

EXAMPLE 1 - ONE PAGE STRATEGY TEMPLATE

Strategy

ENHANCE FRANCISCAN CULTURE

Goal: Implement a Mission Integration plan and complete the formation of all board members in the Franciscan culture .

Success Measures:

- Create new board member requirement for FM formation training.
- Incorporation Franciscan decision making review into board decisions.

Tracking Measures:

- Number of board members having attended FM training.
- Mission Integration plan complete and rolled-out by X/X/24.

XXXXXXXXXX

Goal: XXXX XXXX XXXXX XXXX XXXXX

Success Measures:

- Create new board member requirement for FM formation training.
- Incorporation Franciscan decision making review into board decisions.

Tracking Measures:

- Number of board members having attended FM training.
- Mission Integration plan complete and rolled-out by X/X/24.

XXXXXXXXXX

Goal: XXXX XXXX XXXXX XXXX XXXXX

Success Measures:

- Create new board member requirement for FM formation training.
- Incorporation Franciscan decision making review into board decisions.

Tracking Measures:

- Number of board members having attended FM training.
- Mission Integration plan complete and rolled-out by X/X/24.

XXXXXXXXXX

Goal: XXXX XXXX XXXXX XXXX XXXXX

Success Measures:

- Create new board member requirement for FM formation training.
- Incorporation Franciscan decision making review into board decisions.

Tracking Measures:

- Number of board members having attended FM training.
- Mission Integration plan complete and rolled-out by X/X/24.

usually associated with shorter time frames; often tactical plans are developed on a yearly or quarterly basis.

2. Time Horizon:

- **Strategic Objectives:** Focus on the long-term vision of the organization. They are concerned with where the organization wants to be in the future.
- **Tactics:** Address short to medium-term actions and plans. They are about how to implement and execute the strategies on a day-to-day or project-specific basis.

3. Measurability:**

- **Strategic Objectives:** Often expressed in more qualitative terms, such as culture, scope of services, or sustainability. They can be challenging to measure directly.
- **Tactics:** Are more tangible and measurable. They may involve specific, quantifiable success measurements, or success may be defined in a way that can be assessed through observation or customer feedback.

4. Alignment:

- **Strategic Objectives:** Serve as a guide for the entire organization. All activities and decisions should ideally align with these overarching goals.
- **Tactics:** Are aligned with strategic objectives but are more specific to departments, teams, or projects. They contribute to the achievement of broader strategic goals.

Examples:

Strategic Objectives	Tactics
Strengthen community understanding of our Franciscan purpose and implement practices that reflect our values and desired culture.	1. Include our purpose statement in all external communications. 2. In partnership with X and Y, deliver a monthly Franciscan Practices series where we share practices that reflect our values of collaboration, interdependence, spiritual reflection, and accompaniment. Video and post on website. 3. Revisit our success metrics** to ensure they reflect our values, not outcomes 4. Add a Franciscan values component to our annual review process for staff, committees, and board.
Better align our services with the spiritual needs of the community	1. Evaluate our services based on the results from our listening sessions.

Franciscan Ministries- Strategy Tool

	<p>2.Design or redesign three programs that encourage intergenerational participation. Deliver one of these programs off-site at a senior care facility.</p> <p>3. Extend our counseling hours of operation</p>
Improve sustainability	<p>1.Complete a succession plan.</p> <p>2.Create a young professional group. Provide formation and activities that may result in future Franciscan leaders and donors.</p> <p>3 Develop a community-based youth volunteer corp with other non-profits. Focus on providing group volunteer work on our property, other non-profit plants and directly for elderly, low-income, residents.</p> <p>4. Develop a 5-year capital budget to clearly define our capital needs.</p>
Foster inter-faith dialogue	<p>1. Develop a partnership with a Jewish temple and design one joint event each year.</p>
Strengthen our advocacy for the respect of the poor and disenfranchised	<p>1.Host quarterly registration drives for Dolly Parton's imagination library in low-income areas.</p> <p>2. Design and offer a free-offering LGBTQ+ retreat</p> <p>3. Support XYZ organization in their lobbying efforts for rent control by educating our community and attending public hearings.</p> <p>4. Increase visibility of our social justice forums through increased marketing, speaker selection and invitations to the press.</p>

In summary, strategic objectives provide the overarching direction and purpose for an organization, while tactics are the specific actions and plans implemented to achieve those strategic objectives. Both are integral to the success of an organization, with strategic objectives guiding the overall vision and tactics facilitating the execution of that vision.

** A WORD ON METRICS

An organization’s culture is reflected in its metrics. It is important to understand the distinction between “success metrics” and “trending data”.

Success Metrics aligned with our Franciscan purpose and culture and are tactical organizational and leadership objectives or goals. Success metrics are not based on outcomes. They are generally focused on accompaniment and relationships.

Trending Data does not qualify as success metrics and aren’t usually appropriate to express as organizational or leadership goals, but may provide insight into the demand for, or quality of, our programs, reveal market trends, or provide information that is required for external reporting.

MEASURING SUCCESS	TRENDING DATA
COUNSELING SERVICE - Better serve our community by extending hours of our mental health service to include evenings.	<ul style="list-style-type: none"> - Number of counselors available 5-8pm - Number of appointments during 5-8pm
LOW INCOME DINING ROOM – Provide a variety of free, tasty, and healthy meal within budget in a setting where each guest is greeted personally, served with a smile, and where friendly dialogue is fostered by volunteers who move through the dining room and serve as bussers.	<ul style="list-style-type: none"> - Number of meals served - Number of volunteers versus number needed for high service. - Guest evaluations
PLANT – Exterior of building reflects through words, art, and symbols that we are a Franciscan organization. Grounds are safe and reflect the beauty of the creator and draw people into a sense of awe. Rooms provide a welcoming space for reflection and prayer. Our stories and values are clearly communicated throughout our location through stories.	<ul style="list-style-type: none"> - Number of visitors - Visitor evaluations - Inspections (by leadership, outsiders, insurance)
RETREATS – We provide a welcoming space for groups to spend time on spiritual reflection. The grounds provide adequate quiet space 24/7, and natural spaces/walks/gardens that encourage reflection. At least 20% of retreats are led by Franciscan retreat leaders on Franciscan topics. The experience of being on retreat leads people to come back.	<ul style="list-style-type: none"> - % of return retreats - % of return visitor - Number of private retreats - Number of retreatants attending spiritual direction - Type of retreat by percentage - Attendance of sponsored retreats -occupancy rates
DEVELOPMENT – Increase sustainability while also relying on the providence of God. Establish a planned giving program and apply for grants that align with values.	<ul style="list-style-type: none"> - Number of people participating in planned giving - Dollar amount of committed gifts - Number of grants applied/grants received