



**2009-2011 Strategic Plan Goals**

**Updated December 2009**

## 2009-2011 Strategic Goals and Objectives Summary

1. Be acknowledged as the **authoritative resource** on grants management by grantmaking organizations and the philanthropic field by:
  - Leading Project Streamline to achieve its goals of i) raising awareness of the impact of application, monitoring, and reporting practices, ii) reducing the resources dedicated to these practices for both grantmakers and grantseekers, and iii) institutionalizing the principles and making them part of the philanthropic culture.
  - Increasing GMN's visibility by i) forming strong relationships with peer funder networks in ways that highlight the importance of grants management to those audiences and ii) forming and participating in collaborations that solve field-wide problems.
  - Determining whether to pursue a full certification program or focus on developing an education program for grants management.
2. Increase the knowledge and skills of grants management professionals through the creation and delivery of **programs, resources, and services** by:
  - Creating new content that meets member needs and responds to emerging issues.
  - Delivering an annual conference that at least 90 percent of participants feel was relevant and provided them with concrete tools and resources to apply in their work.
  - Creating and managing a vibrant online community that is accessed monthly by at least 30 percent of members.
  - Implementing a "green grants" effort that provides suggestions to grantmakers on how to conduct their grantmaking in an environmentally friendly way.
3. **Engage more members** in GMN programs, resources, services, and leadership development volunteerism by:
  - Defining desired level of member engagement and developing strategies, including new member outreach that results in 50 percent of members reaching this engagement level by 2011.
  - Creating a volunteer recruitment, management, and recognition program that 1) meets GMN's annual resource needs and 2) results in a volunteer retention rate of at least 75 percent.
  - Developing a structured support program for regional networks that assists them in delivering consistent, quality programs to members.
  - Creating sector-specific groups that act like virtual regions.
4. Ensure that GMN has the **governance, resources, and infrastructure** to achieve its strategic plan and be accountable to members and funders by:
  - Raising sufficient funds through contributions and earned income to meet GMN's annual budget and maintain a six-month operating reserve.
  - Developing and implementing a staffing plan that supports GMN's annual plan.
  - Focusing the GMN's board work on strategy, financial oversight, and other governance issues.
  - Making GMN a model for nonprofit accountability and transparency for its members and funders.

## Goal 1: Authoritative Resource

### Objective 1: Project Streamline

Lead Project Streamline to achieve its goals to:

- Raise awareness of the impact of application, monitoring, and reporting practices
- Reduce the resources dedicated to these practices for both grantmakers and grantseekers
- Ensure the long-term success of the project by institutionalizing the principles and making them part of the philanthropic culture

### Measures

- Number of grantmakers and grantseekers who receive information on Project Streamline
- Number of grantmakers trained to streamline
- Number of grantmakers who use Project Streamline tools and resources
- Changes in hours spent on application, monitoring, and reporting to streamlined grantmakers by grantseekers
- Increase in net grants to grantseekers by streamlining grantmakers

### 2009 Accomplishments

- Developed the **Guide to Streamlining**, which incorporates the final Project Streamline principles, workgroup products, and pilot training program content. (Guide will be released in early 2010)
- Held three **Action Workshops** (including pilot) in 2009 training 71 individuals from 44 grantmaking organizations.
- Created and added content and interactive features to the **Project Streamline website** that culminated in two newsletters reaching grantmakers and grant seekers. Content and features focus on streamlining stories that inspire grantmakers to change.
- Began work on an **assessment tool** for a 2010 launch that grantmakers can use to identify opportunities for streamlining in their own processes and help them see change over time.

### 2010 Activities

- Complete 18 action workshops for grantmakers, training 180 grantmaking organizations in how to streamline.
- Launch assessment tool to be used by at least 250 grantmakers to identify opportunities for streamlining their own processes.
- Continue communications strategies to promote Project Streamline, Guide to Streamlining, Assessment Tool, and workshops.
- Gather partner plans for the institutionalization of the project tools, resources, and principles within their organizations.

### 2011 Activities (Draft)

- Continue to promote the Guide, workshops, and Assessment Tool.
- Complete institutionalization of the project tools, resources, and principles within the partner organizations.
- Evaluate the project's success, which will be complete as a stand-alone effort, and share with the field how its tools, resources, and principles will continue to be accessible through the partner organizations.

## **Goal 1: Authoritative Resource**

### **Objective 2: Increased Visibility**

Increase GMN's visibility by i) forming strong relationships with peer funder networks in ways that highlight the importance of grants management to those audiences and ii) forming and participating in collaborations that solve field-wide problems.

#### **Measures**

- Number and quality of engagements with funder networks
- Changes in member perception of how the field views grants management (member survey)

#### **2009 Accomplishments**

Partnerships pursued in 2009 were:

- Participated on the Effective Collaborations effort led by the Council on Foundations and the Forum of Regional Association of Grantmakers who are working on 1) cost sharing solutions and 2) better information sharing among funder networks.
- Built a team to work with the Foundation Center on establishing geographic coding standards for the field.
- Participated in the Foundation Center's Diversity Metrics Project.
- Engaged the Association of Baltimore Area Grantmakers in Host Committee planning for the Annual Conference and Washington Grantmakers to help promote the Conference.
- Continued to serve on advisory council for the NGO Repository Project.

#### **2010 Activities**

- Participate in the Effective Collaborations initiative,
- Develop a geographic coding standard for the field of philanthropy in partnership with the Foundation Center.
- Continue participation in and support of the NGO Repository Project.
- Continue participation in and support of the Foundation Center's Diversity Metrics Project.
- Develop and implement a plan to increase GMN's presence at major industry conferences and events to inform the industry about grants management and GMN's programs, products, and services and to attract new members.

#### **2011 Activities (Draft)**

- Identify and engage in existing/new collaborations that solve field-wide problems.
- Continue implementation of the plan to increase GMN's presence at major industry conferences and events to inform the industry about grants management and GMN's programs, products, and services and to attract new members.

## **Goal 1: Authoritative Resource**

### **Objective 3: Certification**

Determine whether to pursue a full certification program or focus on developing an education program for grants management.

#### **Measures**

- TBD

#### **2009 Accomplishments**

- Created a comprehensive list of grants management related resources, which has been added to the GM Guide and served as the basis for the development of the draft Body of Knowledge.
- Completed a business plan for a potential grants management certification program.

#### **2010 Activities**

- Release the Body of Knowledge to members.
- Deliver a business plan to the GMN board and secure approval for next steps and budget.

#### **2011 Activities (Draft)**

- TBD

## **Goal 2: Programs, Resources, and Services**

### **Objective 1: New Content**

Create new content on a regular basis that meets member needs and responds to emerging issues in the field.

#### **Measures**

- Members who read/use/attend programs, resources and services
- Member survey showing GMN is their primary source of information on emerging issues
- Member satisfaction with quality and relevance of content

#### **2009 Accomplishments**

- Published two issues of the *GMN Examiner* newsletter.
- Launched "What Works" webinar series, a peer-to-peer learning program. 94 percent of participants reported that receiving education through a webinar was effective and that they would attend and recommend future webinars.
- Developed a team to manage and update the GM Guide and began to develop three new sections for the Guide.
- Released 2009 Member Salary and Benefits report.
- Developed guide to delivering webinars for use by GMN teams and regions to provide additional options for the delivery of content to members.
- Released at least one new program, resource, or service each month.

#### **2010 Activities**

- Publish three issues of the *GMN Examiner* newsletter.
- Hold three "What Works" webinars.
- Manage and update the GM Guide on a regular basis so that it incorporates 1) subscriber comments, 2) discussions in GMN's online community, 3) the Body of Knowledge, and 4) developments in the broader field, including Project Streamline.

#### **2011 Activities (Draft)**

- Publish three issues of the *GMN Examiner* newsletter.
- Hold five "What Works" webinars.
- Manage and update GM Guide on a regular basis so that it incorporates 1) subscriber comments, 2) discussions in GMN's online community, 3) the Body of Knowledge, and 4) developments in the broader field, including Project Streamline.

## **Goal 2: Programs, Resources, and Services**

### **Objective 2: Annual Conference**

Deliver an annual conference that at least 90 percent of participants feel was relevant and provided them with concrete tools and resources to apply in their work.

#### **Measures**

- Number of conference attendees
- Evaluation of conference participants

#### **2009 Accomplishments**

- Exceeded goal of 300 conference attendees at the 2009 conference (304 participants total).
- Exceeded participant satisfaction goal for the 2009 conference—98.8 percent of attendees felt the conference provided concrete tools and resources to apply in their work, and 95.9 percent of respondents felt the conference was relevant.
- Captured plenary speakers on video and made recordings and conference materials available to all GMN members via our online community.
- Developed Streamlining theme, learning tracks, and expanded number of sessions for the 2010 conference and secured nationally-known plenary speakers for the conference.

#### **2010 Activities**

- 2010 - Attract 300 participants to the 2010 conference through extensive marketing efforts.
- 2010 - Deliver an annual conference that at least 90 percent of participants feel was relevant and provided them with concrete tools and resources to apply in their work.
- 2010 - Raise \$200,000 through conference registrations, exhibitor fees, and sponsorships to fund the cost of the conference towards a goal of breaking even on the conference by 2011.
- 2011 - Develop a 2011 conference theme and agenda that responds to member interests expressed in the prior conference evaluations, annual member survey, and the online community; and recruit high quality, high profile plenary and session speakers for the annual conference.

#### **2011 Activities (Draft)**

- 2011 - Attract 330 participants to the 2011 conference through extensive marketing efforts.
- 2011 - Deliver an annual conference that at least 90 percent of participants feel was relevant and provided them with concrete tools and resources to apply in their work.
- 2011 - Raise sufficient funds through conference registrations, exhibitor fees, and sponsorships to break even with conference expenses.
- 2012 - Develop a 2012 conference theme and agenda that responds to member interests expressed in the prior conference evaluations, annual member survey, and the online community; and recruit high quality, high profile plenary and session speakers for the annual conference

## **Goal 2: Programs, Resources, and Services**

### **Objective 3: Online Community**

Create and manage an online community that is accessed monthly by at least 30 percent of members.

#### **Measures**

- Members who access the community
- Members who contribute to the community
- Member satisfaction with the community

#### **2009 Accomplishments**

- Launched new website and member community in May 2009.
- Recruited a team of volunteers to manage the online community who produced three issues of a Member Community News, which highlights community content and features and encourages members to access and participate in the community. Around 25 percent of members are reading the News, and it has been successful in driving traffic to the community.

#### **2010 Activities**

- Continue to develop and implement strategies for increasing member use of the community.
- Develop a pool of member experts who could monitor and help answer discussion threads on the community.

#### **2011 Activities (Draft)**

- Continue to develop and implement strategies for increasing member use of the community.
- Began planning for features and functionality for next major upgrade to the community.

## **Goal 2: Programs, Resources, and Services**

### **Objective 4: Green Grants**

Implement a “green grants” effort that provides suggestions to grantmakers on how to conduct their grantmaking in an environmentally friendly way

#### **Measures**

- Number of grantmakers adopting “green grants” approach as reflected in member survey

#### **2009 Accomplishments**

- Completed a survey of the practices of GMN members (285 participants), which will be developed into a report to be released at GMN’s 2010 conference.
- Developed three sessions for the 2010 GMN conference to share the report findings and begin encouraging grantmakers to adopt more green practices.

#### **2010 Activities**

- Release Greening Report at the GMN Conference and deliver three sessions in support of greening grants management, including a session sharing the experiences of Kermit Squad members who have pursued “greening” in their grantmaking.
- Provide ideas and advice on how to green GMN activities, including the Annual Conference.
- Hold webinar or in-person sessions at GMN regional meetings to share the Greening Report and gather ideas/input on how GMN can support more environmentally friendly grants management practices throughout the field.
- Provide related articles for each edition of the *GMN Examiner*.

#### **2011 Activities (Draft)**

- TBD

## **Goal 3: Engagement**

### **Objective 1: Members**

Define desired level of member engagement and developing strategies, including new member outreach that results in 50 percent of members reaching this engagement level by 2011.

#### **Measures**

- Number of members reaching desired engagement levels

#### **2009 Accomplishments**

- Implemented and completed a comprehensive update to GMN's membership database to position GMN to track and report on how members are using GMN's programs, resources, and services.
- Began work to define member engagement and develop strategies to increase the level of member engagement.

#### **2010 Activities**

- Define desired level of member engagement, develop tracking and evaluation methods (e.g., member survey), and implement strategies, including new member outreach, to increase engagement levels.
- Deliver new member orientation on a regular basis.

#### **2011 Activities (Draft)**

- Continue to implement strategies, including new member outreach, so that 50 percent of members reach the desired engagement levels by the end of the year.
- Evaluate and develop methods for GMN to receive member feedback and input in the most efficient and effective manner to inform GMN's ongoing work and next three-year planning process.

## **Goal 3: Engagement**

### **Objective 2: Volunteers**

Create a volunteer recruitment, management, and recognition program that 1) meets GMN's annual resource needs and 2) results in a volunteer retention rate of at least 75 percent.

#### **Measures**

- Number of volunteers
- Annual volunteer retention rate
- Volunteer satisfaction with experience
- Volunteer survey of skills and experience gained through GMN volunteerism
- Committee and regional chair satisfaction with support they receive from GMN

#### **2009 Accomplishments**

- Developed job descriptions for all GMN volunteer positions to facilitate volunteer recruitment and support volunteer retention through clearer definitions of volunteer responsibilities.
- Trained GMN board and regional leaders in volunteer management, providing strategies and ideas for recruiting and managing their volunteer teams.
- Through volunteer retention and new recruitment, engaged 149 volunteers in 2009.
- Developed (for 2010 implementation) a volunteer recognition strategy to promote volunteer retention.

#### **2010 Activities**

- Conduct both broad and targeted member outreach to fill any open volunteer positions with a special focus on engaging former GMN board members.
- Develop and implement a method for capturing volunteer information (i.e., who are our volunteers and what are they doing).
- Identify and meet common training needs of GMN volunteers (e.g., volunteer management, fundraising, people management, running a region, etc.).
- Implement volunteer recognition strategy to support volunteer retention.

#### **2011 Activities (Draft)**

- Conduct both broad and targeted member outreach to fill any open volunteer positions.
- Identify and meet common training needs of GMN volunteers (e.g., volunteer management, fundraising, people management, running a region, etc.).
- Develop and implement a communications strategy that shows employers how GMN volunteerism can build concrete skills and serve as a professional development vehicle for their grants management employees

## **Goal 3: Grow and Engage**

### **Objective 3: Regional Growth and Support**

Develop a structured support program for regional networks that assists them to deliver consistent, quality programs to members.

#### **Measures**

- Regional leadership satisfaction with support received from GMN
- Member survey of the consistency and quality of regional chapter activities

#### **2009 Accomplishments**

- Conducted first State of the Regions report to identify current structures and practices in regional chapter management and additional resources and support that could help regional volunteers in the management of chapters.
- Launched Regional Roadmap, a compilation of best practices in regional structures and meeting planning to provide guidance and ideas for regional leaders.
- Delivered volunteer management training to regional leaders to provide ideas and strategies for engaging more members in volunteerism.
- Launched new region in Florida.
- Delivered more than 80 hours of education and networking support to members through regional meetings.

#### **2010 Activities**

- Hold a regional summit in 2010 focusing on replicating best practices in regional operations, strengthening the relationship between regional chapters and national GMN, and connecting regions better to each other.
- Launch a speaker database to facilitate regional meeting planning.
- Continue to support existing regions.

#### **2011 Activities (Draft)**

- Continue to support existing regions
- Identify one new geographic area that could support a successful regional network and begin work to form a region.
- Engage regions in strategic planning efforts for GMN's next three-year plan.

## **Goal 3: Grow and Engage**

### **Objective 4: Sector Groups**

Create sector-specific groups that act like virtual regions.

#### **Measures**

- Number of sector groups
- Level of sector group activity
- Number of members engaging in sector groups
- Member survey of the relevance and quality of GMN programs, products, and services to them

#### **2009 Accomplishments**

- Launched online sector groups in GMN community.

#### **2010 Activities**

- Build active and engaged online sector groups in the member community.

#### **2011 Activities (Draft)**

- Support existing and forming sector groups.
- Begin to partner and share content with sector-specific groups outside of GMN to enhance the programs, products, and services delivered to GMN members.



## **Goal 4: Operations**

### **Objective 2: Staffing**

Develop and implement a staffing plan that supports GMN's annual plan.

#### **Measures**

- GMN has staff resources needed to meet its plan goals
- GMN staff evaluations
- Board self-assessment results

#### **2009 Accomplishments**

- Created and implemented a formal evaluation process for GMN's Executive Director.
- Revised GMN's structure as part of the 2010 planning process to focus on smaller, more defined work teams that begin to transition from board to volunteer leadership.

#### **2010 Activities**

- Implement staffing plan.
- Evaluate the Executive Director.
- Create a 2011 staffing plan that continues to focus on increased leadership opportunities for GMN volunteers and paid staff support in key operational areas.

#### **2011 Activities (Draft)**

- Implement staffing plan.
- Evaluate the Executive Director.
- Create a 2012 staffing plan that continues to focus on increased leadership opportunities for GMN volunteers and possible addition of additional employees in key operational areas.

## **Goal 4: Operations**

### **Objective 3: Governance**

Focus the work of the GMN board on strategy, financial oversight, and other governance issues.

#### **Measures**

- Board self-assessment results

#### **2009 Accomplishments**

- Implemented board development program that focused on i) enhanced orientation of new board members, ii) volunteer management training, and iii) fundraising training.
- Conducted first board self-assessment, incorporating results in 2010 plan goals.
- Conducted a board nomination process that resulted in the election of four new board members in 2009.

#### **2010 Activities**

- Attract, engage, and develop an inclusive and diverse board with the skills and experience to meet the organization's needs.
- Design a board member orientation and transition program that prepares board members for both their governance responsibilities and committee/team responsibilities.

#### **2011 Activities (Draft)**

- Attract, engage, and develop an inclusive and diverse board with the skills and experience to meet the organization's needs.
- Conduct a board self-assessment to inform GMN's next three-year plan.
- Continue to refine GMN's board member orientation and transition program to prepare board members for both their governance responsibilities and committee/team responsibilities.

## **Goal 4: Operations**

### **Objective 4: Accountability and Transparency**

Make GMN a model for nonprofit accountability and transparency for its members and funders.

#### **Measures**

- Unqualified audit opinion
- Member survey results

#### **2009 Accomplishments**

- Released first annual report including audit report.
- Conducted 2008 audit, receiving an unqualified audit opinion, and filed the 2008 tax return on time.
- Maintained up-to-date website, Guidestar listing, and other public information on GMN.
- Conducted a member survey, increasing the response rate to 56 percent, and incorporated feedback into 2010 GMN planning.
- Implemented new fundraising and membership database to better record and track member data, fundraising prospects, and reporting requirements and due dates.

#### **2010 Activities**

- Conduct a 2009 audit that results in an unqualified audit opinion and file 2009 tax return on time.
- Create new volunteer team focused on Accountability and Transparency to draft policies and procedures for board consideration that improve GMN's accountability and transparency.
- Evaluate the accounting needs of GMN, including CFO-like services and daily bookkeeping, and ensure that GMN has the appropriate support in place to meet those needs.

#### **2011 Activities (Draft)**

- Conduct a 2010 audit that results in an unqualified audit opinion and file 2010 tax return on time.
- Continue implementation of policies and procedures that make GMN a model for nonprofit accountability and transparency for its members and funders.