



Strategic Scorecard Service Grant



The Strategy Management Practice is presented by Wells Fargo.



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Outline

- Strategy Management
- How does the Strategic Scorecard Service Grant fit in?
- What is a Strategic Scorecard?
- Why do a Strategic Scorecard Service Grant?
- What are the deliverables and what is considered in scope?
- What is not in scope for this Service Grant?
- What are the criteria to qualify for this Service Grant?
- Process
 - Key milestones
 - Pro Bono Consultant team
 - Project management and tools
 - Timeline

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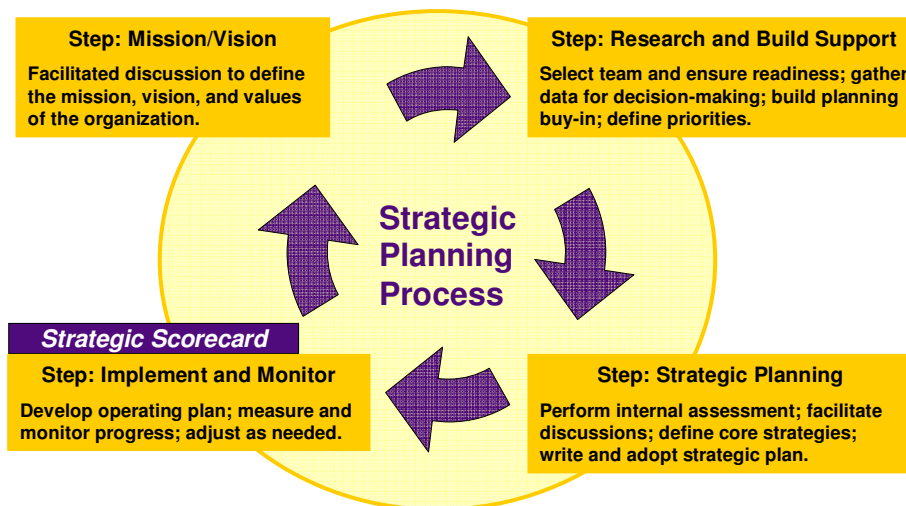
Strategy Management

- **The Purpose:**
 - Help organizations thoughtfully explore their environments as well as their own internal strengths and weaknesses
 - Monitor and measure progress towards an organization's defined strategic objectives (e.g. balanced scorecard)
 - Facilitate decision-making among key stakeholders
- **The Result:**
 - Detailed data collection and analysis, which provides contextual information the organization needs to make good strategic decisions
 - Established common terminology around organization's strategic goals and objectives
 - Framework for describing strategic execution

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The Strategic Planning Process



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What is a Strategic Scorecard?

A scorecard is a tool an organization can use to monitor and measure progress towards achieving its strategic plan.

	Measure	Target	Actual	Status
Internal Process				
• Objective				●
•				●
•				●
Financial				
• Objective				●
•				●
•				●
Stakeholder				
• Objective				●
•				●
•				●
Learning & Growth				
• Objective				●
•				●
•				●

Sample Scorecard

Audience:

The scorecard is designed to meet the needs of the board and the senior management team.

Timing:

Strategic Scorecards are intended to be reported on a quarterly basis.

Consistency:

Scorecards measure against strategic long-range goals instead of day-to-day or month-to-month goals.

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Performance Perspectives

The scorecard outlines the organization's objectives and progress towards those objectives across these four performance perspectives:

1. Financial
2. Internal Process
3. Stakeholder
4. Learning and Growth



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Why do a Strategic Scorecard Service Grant?

Often nonprofits find that they write a strategic plan, put it on the shelf and never look at it again. A plan that sits on the shelf will not help you reach your goals.

A Strategic Scorecard Service Grant helps an organization use its strategic plan to track and communicate progress.

With the right data, rather than more data, you can define and communicate your success to your board and other key stakeholders. With the Service Grant, a Pro Bono Consultant team will address:

- Measures to quantify and monitor strategic progress
- Clear method by which to present strategic progress to a board or other key stakeholders
- Establishment of common terminology around strategic goals and objectives

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Activities in Scope

The grant scope includes:

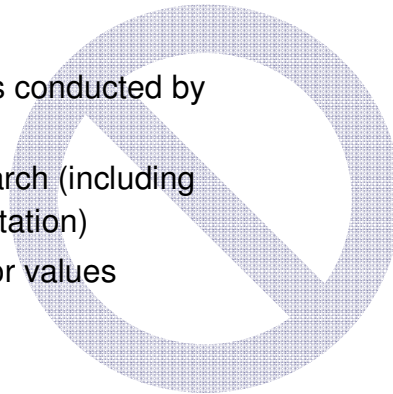
- **Internal interviews** (organization's staff and board members)
- **Analysis of current strategic plan** for clarity around goals, objectives, measures and targets
- **Organization of objectives into performance perspectives** for a balanced approach that encompasses a range of organizational goals
- **Deliverables:**
 - ➡ Strategic scorecard sample tool that provides a framework for describing strategic execution specific to your organization and your reporting needs
 - ➡ Data collection plan that ensures feasibility of reporting on strategic targets
 - ➡ Board and staff training to ensure a useable scorecard and alignment around terminology

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Activities that are not in scope

- Creating a strategic plan
- Developing strategic recommendations
- Organizational assessment
- More than 20 total interviews conducted by the Service Grant Team
- Focus group or survey research (including survey creation or implementation)
- Changes to mission, vision or values



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Grant Criteria

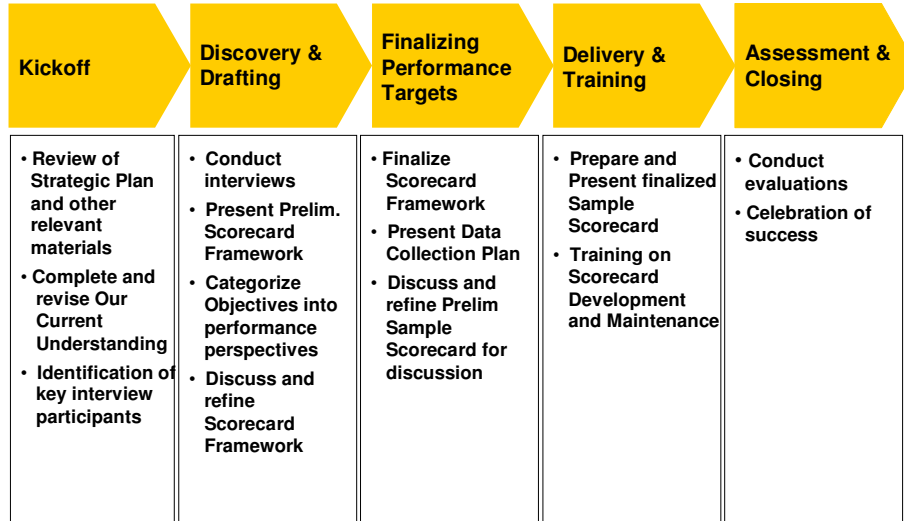
We recommend you apply if your organization has:

- A clear sense of mission and vision
- A robust and current strategic plan with clearly articulated goals and objectives with at least 2 years left until projected completion
- PowerPoint and Excel proficiency and skills necessary to build, deploy, and analyze a basic online survey
- Staff who can invest the necessary time to make the project succeed:
 - Executive Director: 1 to 2 hours per week
 - Key managers: 10 to 15 hours total
 - Finance manager: 10 to 15 hours total
 - Technical contact: 10 to 15 hours total
 - Board representative: 3 to 5 hours total

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The Process



* Please note that while the Pro Bono Consultant team completes most of the work, the nonprofit also has tasks and deliverables at each stage.

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The Strategic Scorecard Team

- Account Director
- Project Manager
- Strategy Consultant
- 2 Strategy Associates

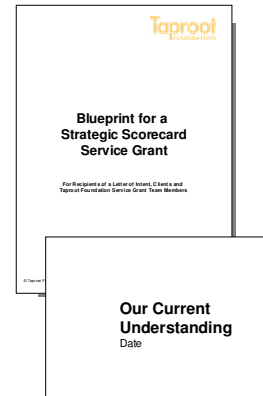
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Program Management and Tools

Your organization will be equipped with the following resources for the Strategic Scorecard Service Grant:

- Leadership from Account Director
- Oversight from Project Manager
- Pro Bono Consultant team with Taproot tools that can be shared with you as needed:
 - Strategic Scorecard blueprint
 - PowerPoint templates for: Our Current Understanding, Preliminary Scorecard Framework, Preliminary Scorecard Sample, and Data Collection Plan
 - Helpful articles and links



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Ideal Timeline*

Stage	Approximate Timing
Letter of Intent (LOI) Sent	
Account Director Assigned / Site Visit	1 month after LOI sent
Staffed	2 months after LOI sent
Kick Off Completed	2 – 3 months after LOI sent
Discovery Completed and Final Project Plan Approved	4 – 5 months after LOI sent
Present Revised Scorecard Framework and Data Collection Plan	6 months after LOI sent
Drafts Approved and Final Scorecard Sample Presented	7 months after LOI sent
Training Completed and Project Closed	8 months after LOI sent

*Ultimately, depends on you and your team

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