



# Project Impact Report

## STRATEGIC PLANNING:

A COMPREHENSIVE APPROACH TO DEVELOPING AND  
IMPLEMENTING A CONCISE 3-YEAR STRATEGIC PLAN

**Change Often - Social  
Innovation Firm**

*to improve is to change...  
to perfect is to Change Often.*


Prepared for

**Heidi Majors**

Executive Director,  
YWCA High Point

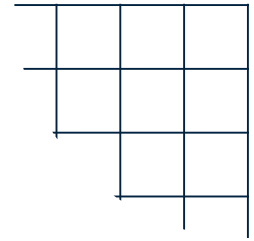
Point of Contact

**Cyril Jefferson**

Principal,  
Change Often - Social  
Innovation Firm

# Project Impact Report

## YWCA High Point



Strategic Planning

A Comprehensive Approach to Developing and Implementing a Concise  
3-Year Strategic Plan

### **The YWCA's Challenge:**

The YWCA's previous strategic plan ended in 2020. Subsequent planning by the board and staff had taken place. However, a comprehensive plan needed to be developed to maximize the organization's impact.

Between strategic planning efforts, YWCA leadership spent time reconsidering the effectiveness of their programs and exploring future opportunities. The organization felt that strategic planning was critical to stay relevant and meet community needs at the highest level, and that previous planning efforts resulted in significant organizational change and growth.

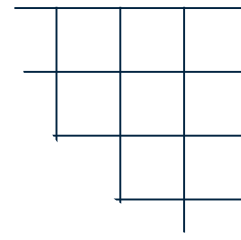
Led by the Ad Hoc Strategic Planning Team, the planning process depended upon engagement from key stakeholders including YWCA HP Members, donors, board & staff, and maternal health nonprofit professionals through accessible and inclusive facilitated planning sessions.

### **Change Often's Solution:**

In order to provide a comprehensive strategic planning solution, Change Often employed a team approach to leverage the broadest support throughout the duration of the project. Led by Senior Consultant, Rod Brooks, the Change Often team implemented a strategic planning process utilizing tools that were proven to be effective, ensured that a collective vision for the plan and the process was cast through a Diversity, Equity, and Inclusion lens, and provided support as the strategic plan was operationalized. This solution resulted in the following outcomes:

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## YWCA High Point



### Product Scope | Outcomes

#### Outcome 1: A concise 3-year strategic plan

Engaging the Ad Hoc Strategic Planning Team through a series of monthly meetings taking place September 2022 - January 2023, complemented by monthly check-ins with Executive Director Heidi Majors during this period, in-depth (6-hour) strategic planning sessions taking place in December 2022 and January 2023, and internal team meetings with staff (i.e., Mission to Mars exercise and monthly committee meetings), a strategic plan was created that articulates the YWCA's Core Values, Core Focus, 10-Year Target, Marketing Strategy, 3-Year Picture with specific measurable results, 1-Year plan with specific measurable goals, quarterly priorities and issues list.

#### Outcome 2: Report on Research Findings

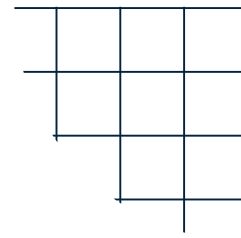
The Change Often team reviewed prior strategic plans developed by the YWCA HP, interviewed YWCA National representatives, reviewed the YWCA National strategic plan, and conducted an internal and external survey. In all, more than 270 key constituents were approached to provide input. Survey questions were developed collaboratively with the Ad Hoc Strategic Planning Committee. Reports on the External Survey Data Analysis and Internal Survey Data Analysis were provided.

#### Outcome 3: Stakeholder Buy-In

The Board of Directors unanimously approved the strategic plan in February 2023, reflecting broad support of the strategic vision that was developed. During subsequent meetings with the Ad Hoc Strategic Planning Committee, several members expressed their gratitude and indicated that the process was among the most effective and enjoyable they had experienced. Prior to the plan's adoption, The YWCA HP shared the plan with the full staff, and afterwards conducted a "report out" of the strategic plan in September 2023. Additional comments and reviews are noted in the Highlights section below.



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## YWCA High Point



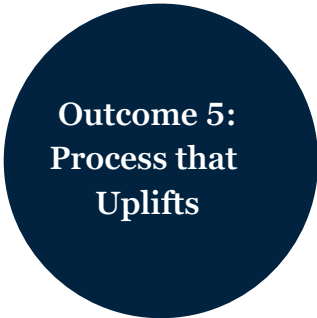
### Product Scope | Outcomes

*(continued)*



#### Outcome 4: Implementation Roadmap

Once the strategic plan was adopted by the Board of Directors, Change Often facilitated Quarterly Pulse meetings in April 2023, July 2023, October 2023, and January 2024. During these meetings, participants reported on quarterly key performance indicators, progress toward quarterly priorities (rocks) and the yearly goals identified, identified priorities for the upcoming quarter, and discussed issues that may have presented obstacles. During the final Quarterly Pulse meeting, annual goals for FY 2024 were identified. The management team is well trained and prepared to continue this management process going forward. Importantly, the President-elect of the Board of Directors is responsible for ensuring that the commitment to the quarterly pulse meetings continues.

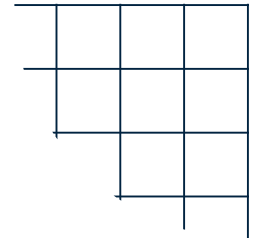


#### Outcome 5: Process that Uplifts

While this objective is somewhat subjective, the 3-year strategic plan and the process that was utilized to develop it has served to promote and uplift the YWCA High Point. During the second Quarterly Pulse meeting, the YWCA HP suffered a setback while planning the JEDI Conference, which had to be postponed. Executive Director Heidi Majors stated that the Core Values provided valuable guidance while managing this challenge and the strategic plan provided a clear reference to drive their actions.

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## YWCA High Point

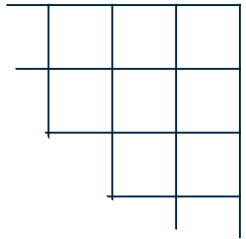


### Product Scope | Firm Activities

<b>Objective 1 - Project Alignment &amp; Management (September 2022 - January 2023)</b>	
<b>Activities</b>	<b>Deliverables</b>
Hold collaborative meetings with the Ad Hoc Strategic Planning Team	Agreed-upon organization goals and key talking points for community engagement
	Strong collaborative relationships between Ad Hoc Strategic Planning Team, Consultants, and other key stakeholders
	Clearly articulated written project plan & schedule
Create digital space for the Ad Hoc Strategic Planning Team to collaborate	Google Drive folder with thorough project documentation
Coordinate, organize, and execute action items while prioritizing the scope, budget, and timeline of the project duration.	Effective execution of project plans within budget and timeline
Complete a project assessment regarding completion of objectives and outcomes.	Project closeout meeting Closeout report
<b>Objective 2 - Research and Stakeholder Engagement (October - December 2022)</b>	
<b>Activities</b>	<b>Deliverables</b>
Research YWCA National strategic plan through literature review & interview with national representative to ensure outcome alignment	Compilation of research and key findings supported by exemplary quotes
Collaborate with YWCA staff and Ad Hoc Strategic Planning Team on stakeholder identification, survey and focus group design, and research facilitation	Approved list of survey and focus group interview questions
	A list of key stakeholders to engage through surveys and focus groups

# Project Impact Report

## YWCA High Point

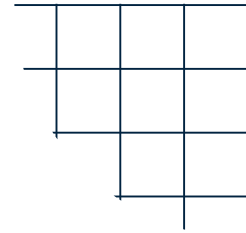


### Product Scope | Firm Activities (continued)

<b>Objective 3 - Plan Development (December 2022 - January 2023)</b>	
<b>Activities</b>	<b>Deliverables</b>
<p>Convene two strategic planning sessions involving a diverse group of representatives from among the Ad Hoc Strategic Planning Team, staff, board of directors, beneficiaries, program participants. Synthesize research findings as we incorporate them in the strategic plan.</p>	<p>A concise (2-3 page) strategic plan that articulates the YWCA's:</p> <ul style="list-style-type: none"> <li>• Core values</li> <li>• Core focus</li> <li>• 3-year target</li> <li>• 3-year picture</li> <li>• Marketing strategy</li> <li>• Year 1 goals</li> <li>• Operationalized measurables</li> <li>• Q1 Priorities</li> </ul>
<p>Advise and consult on key messaging and collateral</p>	<p>Shareable &amp; differentiated digital content to support communication of strategic plan with disparate stakeholder groups</p>
<b>Objective 4 - Plan Implementation (April '23, July '23, October '23, &amp; January '24)</b>	
<b>Activities</b>	<b>Deliverables</b>
<p>Throughout year one, facilitate quarterly "pulse meetings" with key staff and Ad Hoc Strategic Planning Team</p>	<p>Shareable &amp; differentiated digital content to support communication of strategic plan with disparate stakeholder groups</p>

# Project Impact Report

## YWCA High Point



### Project Highlights

**Consistently positive feedback throughout the process:**

**We had a very quick turn around and the Change Often team kept us on track, while adapting to meet the needs of our organization as they evolved.” “The Change Often team listens to the needs of the organization and understands the needs of nonprofits. They kept the project moving in a timely manner.**

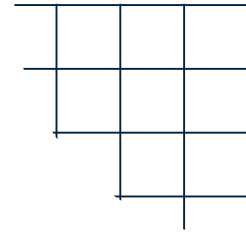


**Heidi Majors Q3 Periodic Review 2022**

**Rod and Clarice worked well together and were very organized and managed the timeline (even over the holidays) to ensure that we have created a strong strategic plan for our organization. They really listened to our entire team and engaged everyone.” “Rod is very knowledgeable in nonprofit management and strategic planning. It has been great to work with him and Clarice on our strategic plan project. They both have been available as needed and responded very quickly to any questions we may have.**

# Project Impact Report

## YWCA High Point



### Project Highlights

**Change Often has true leaders that can help nonprofits with various aspects of work.**

**We were able to pass the strategic plan and our team is moving forward with the quarterly rocks and look forward to meeting with Rod in April. The Change Often team is great!**

**Rod does a great job of having our team focus at the quarterly rocks meetings and to talk through the issues and successes. Rod is great with strategic planning and for bringing teams into a space where they are grounded with the ability to be forward thinking while reflecting on what has been.**

**Rod is great with leading our team and getting materials back to us in a timely manner.” “Rod is very knowledgeable as a leader in our strategic plan process.**

**Change Often worked well to understand our organizations needs and challenge both our staff and board to accomplish our goals. Within our strategic planning, they have helped us create a foundation that can be carried further.**

**eliminating racism  
empowering women**  
**ywca**

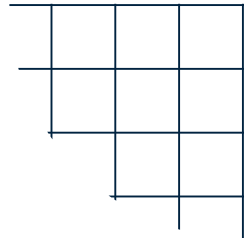


**-Heidi Majors, Q3 & Q4 Periodic Review  
2023**



# Project Impact Report

## YWCA High Point



### Other Project Highlights

- Heidi commented that the concise presentation of the strategic plan in the Vision Traction Organizer (VTO) is unique from what she's seen. The presentation makes the plan **easily understandable, attainable, and provides a process to celebrate successes, identify challenges and ways to overcome them.**
- During the strategic planning process, Heidi identified a need for Board development training with regard to fundraising. Thanks to the relationship established, Change Often was able to provide this training effectively. **The strategic planning process allowed the YWCA HP to identify funding to build capacity, which funded the training.**