



# Setting Your Annual Priorities & Work Plan

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# WELCOME!



Please mute your audio unless it's time for discussion or Q&A.



Use the chat for questions & comments throughout!



The session recording & resources will be shared afterward.



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Development at  
Fio Partners



**AND YOU!**

**Introduce yourself  
in the chat!**  
Name, Organization,  
Location

# WELCOME!



Fio Partners, LLC

*We help leaders  
make better decisions.*

## We work exclusively with:

- Nonprofits
- Foundations
- Collaboratives
- Government Agencies
- And their Boards

## Our services include:

- Strategic Planning
- Strategic Alliances
- Leadership Advisory
- Executive Search (**new!**)
- Succession Planning
- Research & Evaluation
- Training (Staff & Board)



## Session Objectives

### This session will help you:

- Take time to pause and reflect.
- Use outside-in thinking and Fio's strategic management framework as guides to examine your organization's contexts and opportunities.
- Consider priority-setting as a learning and change agenda and how to involve key people.
- Access tools to support discussion, priority-setting, delegation, and action!

# Poll: What does annual priority setting look like for your organization?

- **Starting Line**

We haven't (formally) done it yet, which is why I'm here!

- **New Year's Resolutions**

We set goals, but they fall by the wayside as more immediate needs take priority.

- **Hamster Wheel**

We set priorities and make some progress, but it doesn't feel like we're really getting anywhere.

- **Makin' Moves**

We set meaningful priorities and make great progress against them! This is just a chance to reflect on 2025.





What opportunities and concerns are on your mind heading into 2025?

UMMUTE & SHARE OR USE THE CHAT!

Progress happens  
one step at a time.





Your mission  
marathon  
benefits from  
a team  
training plan.

- **Assess yourself.**

How is your organizational health? What are your current strengths and needs? What's the purpose of your journey?

- **Set your sights on the next mile marker.**

What are the conditions? What opportunities do you see ahead? What are your biggest challenges or obstacles to getting there?

- **Recognize that mission marathons are a team sport.**

What do people (staff, volunteers, your board, funders, etc.) need to understand and contribute to?

- **Be realistic about the pace and duration.**

What kind of change is most needed and realistic to take on *over the next year*? (Doing more is not always best. Define progress.)





Your mission  
marathon  
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## In other words...

- What is the **current state** of your organization and its environment?
- What is the major **work to be done**?
- Who are the **people involved** in making that work happen?
- What **actions and resources** are needed to get there over the next year?



Do you need  
to do deeper  
planning?

- **Scenario Planning** when there's uncertainty around potential external changes that would affect your organization significantly.
- **Strategic Planning** to take a fresh look at the big picture and do longer-term planning (3-5 years) on how you'll get there.



What do you need the  
priority-setting process to  
do for your organization?

UMMUTE & SHARE OR USE THE CHAT!



# Effective priority-setting is

- An opportunity for reflection & learning
- A change agenda (not the status quo) to be implemented by a group of people





Effective priority-setting  
involves relevant insights  
and people.



## Set the Decision- Making Table

To ensure relevant and strategic priorities,  
do a *quick scan* and compile:

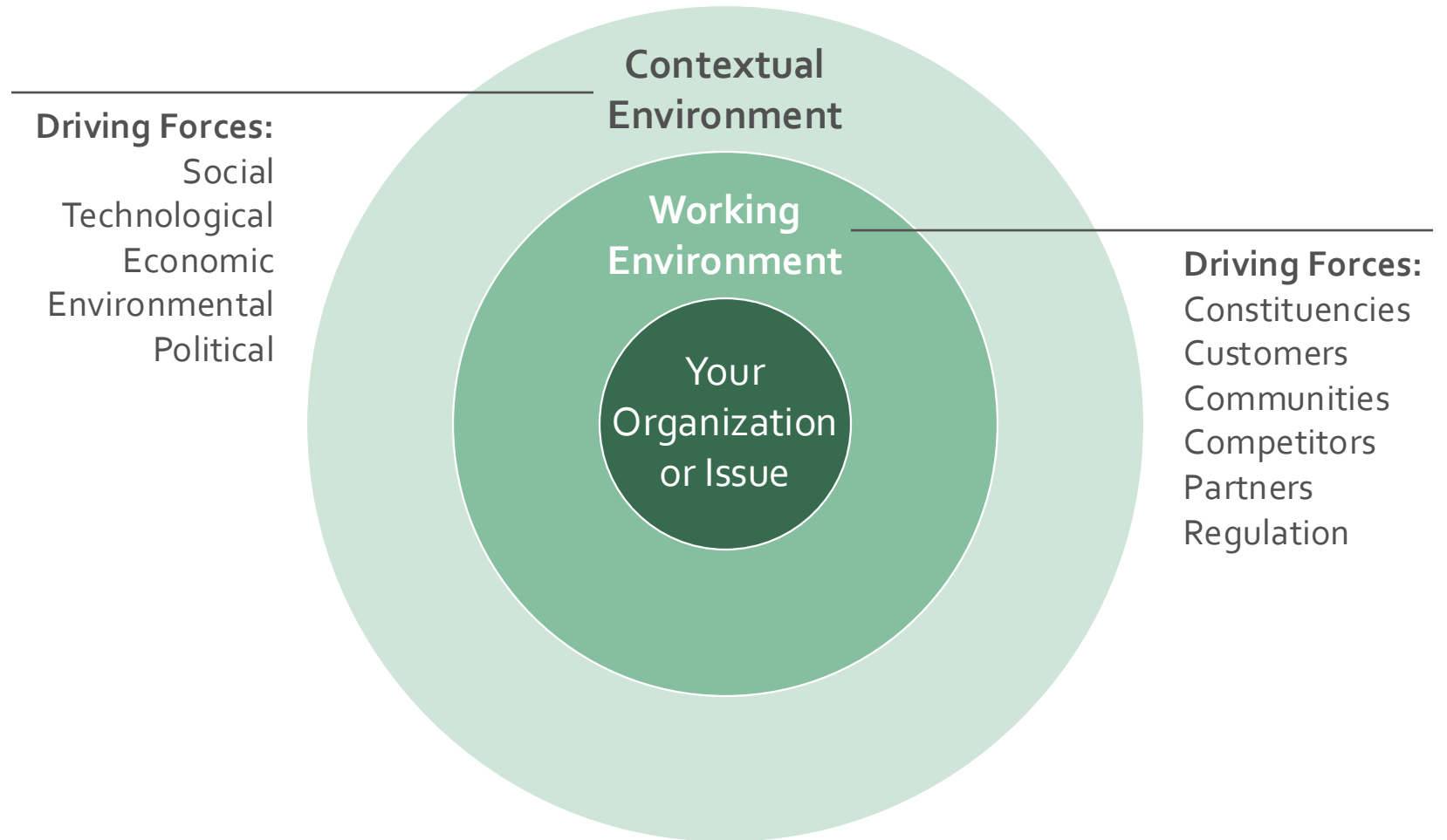
- **External Insights** – What’s happening in your community and beyond?
- **Field Insights** – What are leaders in your field of service emphasizing, prioritizing, or doing?
- **Internal Insights** – What are your organization’s current strengths and challenges or needs?



## Set the Decision- Making Table

- **Environment** (broader external forces)
  - **Community** (assets, needs, trends/changes)
  - **Field of Service** (trends, new approaches)
- 
- **Programs** (relevance, quality)
  - **Workforce** (competencies, culture, processes)
  - **Relationships** (types/purpose, status, communication)
  - **Finances** (mix, trends, reliability)
  - **Infrastructure** (sufficiency, strategic investment)

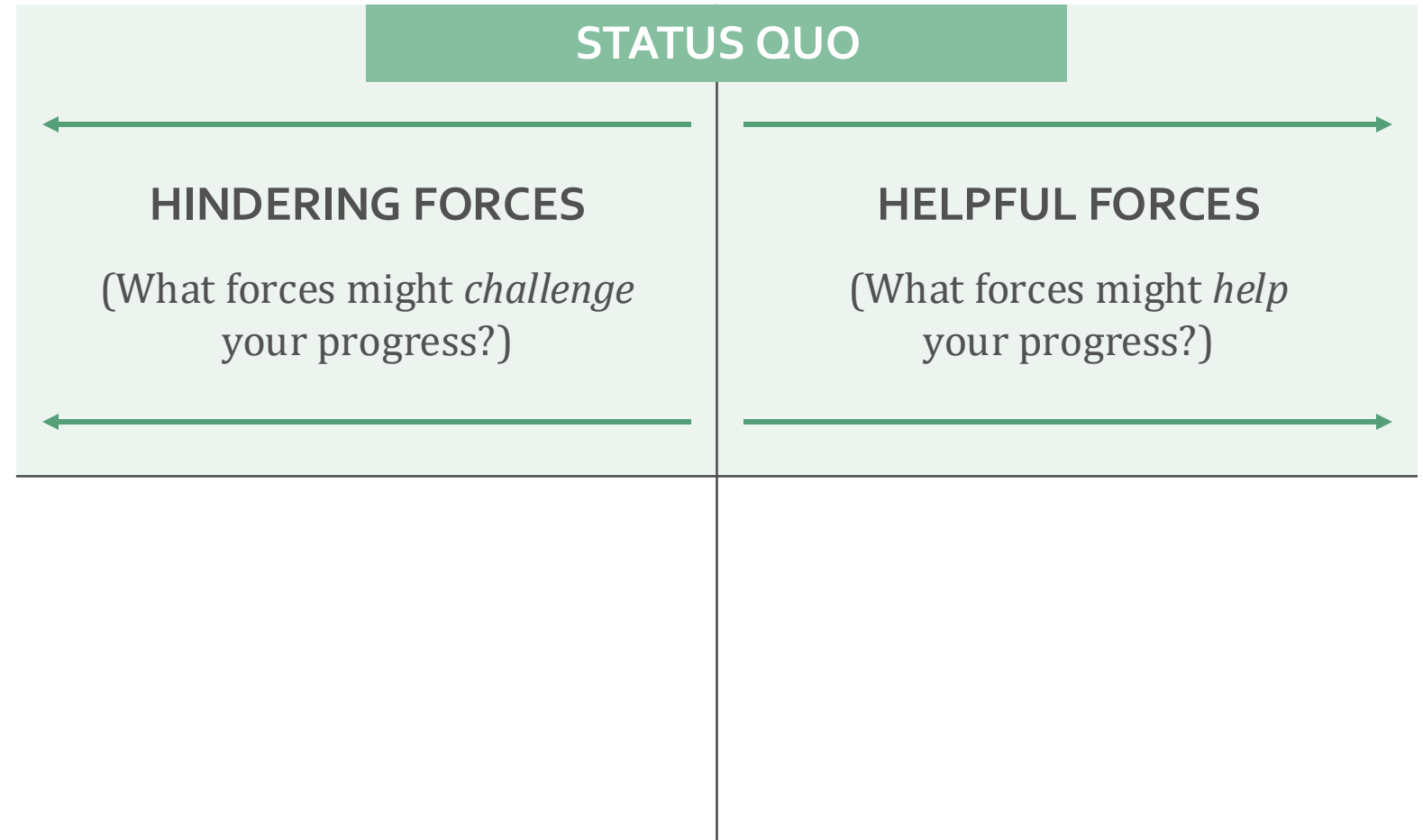
# Scanning the Environment Using Outside-In Thinking



*Figure 1. A Framework for Outside-In Thinking (GBN, 2004, p. 13)*



# Scanning the Environment Using Outside-In Thinking





## Community and Field Insights

(just a few examples)

- [DataHaven](#) – Town Equity Reports, Wellbeing Survey, Data Dashboards
- [CT Data Collaborative](#) – Town and Regional-level Data, Data by Topics like housing
- [United Way of CT](#) – ALICE Report, 211
- [CT Nonprofit Alliance](#) – Legislative advocacy, issue area divisions
- Local community foundations (e.g., [Hartford Foundation](#))
- **Research and position papers** published by private foundations, coalitions, associations, field leaders



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1. **Align Board and staff leadership** around vision, mission, and values, including commitments to equity.
2. **(Re)design the core** programmatic and relational strategies (e.g., collaborations, advocacy, marketing, fund development)
3. **Ensure sufficient infrastructure** (e.g., financial management, HR, tech and info management, facilities)
4. **Enact ways to improve the organization** (e.g., program evaluation, organizational learning)

All four tasks occur with continuous input and interaction with the organization's **environment.**



What  
information  
will help set  
**your table?**

- ***What information do you already have?***
  - Program metrics and client feedback
  - Annual report – impact and financials
  - Other established plans – strategic plan, hiring plan, fund development plan, marketing plan, etc.
- Where might it be beneficial to pause (briefly) and learn more? How might you gather those insights?
  - Existing data or trends reports, informational interview
  - Staff or client pulse survey or suggestion box/poster
  - Organizational Assessment or [Discovery Session](#)
- How will you share the range of insights with the team?



What do you  
want to pause  
to consider?

**UNMUTE & SHARE!**

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## Who do you need to consider or involve?

- Whose experiences and perspectives should inform your organization's priorities?
- Stakeholder groups to consider include:
  - Those you serve
  - Staff
  - Board members
  - Key volunteers
  - Collaborators
  - Community members
- What are their expectations and readiness to participate?



Who do  
you need to  
**consider or  
involve?**

- **Whose experiences and perspectives should inform your organization's priorities?**
- Who do you need to get on board with the priorities?
- Who will need to help see the priorities through?
- How will you consider or involve them in decision-making?

# A Few Examples

| Organization Type        | Existing Structures for Listening and Involvement   |
|--------------------------|---|
| Library                  | <ul style="list-style-type: none"><li>• Friends of the Library (patrons, donors, and volunteers)</li><li>• Regular program collaboration with Human Services</li></ul>                      |
| Congregational Church    | <ul style="list-style-type: none"><li>• Church Council includes chairs of all major volunteer committees and Trustees</li><li>• Regular program collaboration with Human Services</li></ul> |
| Local Prevention Council | <ul style="list-style-type: none"><li>• 12 sectors of the community represented on the Board</li><li>• Member of Regional Behavioral Health Action Organization</li></ul>                   |
| Food Pantry              | <ul style="list-style-type: none"><li>• Resident advisory council</li><li>• Member of regional Hunger Action Team</li></ul>   |




If you've  
set annual  
priorities  
before...

## Look back:

- *Who* was involved in setting the priorities?
- *How* were the priorities communicated, delegated, implemented, and monitored?
- What was accomplished? What was left undone? *Why*?

## Look ahead (unmute and share!):

- What worked well? What was important to success?
- What might you do differently this time?

A grayscale photograph of a mountain peak with several hikers. The hikers are seen from behind, wearing backpacks and climbing gear, as they ascend the rocky terrain. The sky is overcast. The image is framed by a green vertical bar on the left and a light gray vertical bar on the right.

# Change happens at the speed of trust.

- Stephen Covey



## Tools You Can Use: Priority-Setting Session Guide

### **Agenda** (2.5-hour session):

- Welcome, Objectives, and Ground Rules
- Building Connections
- Setting the Decision-Making Table
- Brainstorming Key Actions and Resources
- Establishing Our Priorities
- Next Steps
- Closing Commitments

# What are priorities anyway?

| PRIORITY   | KEY ACTIONS   | RESOURCES NEEDED  |
|--|---|---|
| Area of focus or strategic effort that will advance the org's purpose or capacities. | The specific activities that will support achieving the priority. | Funds, people/partners, knowledge, infrastructure (e.g., space, technology) |



# How do you develop priorities?

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What do we really need?



What are things people say we should do that add up to something bigger?





# Example: Theatre Company

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## **Increase attendance at our performances**

- Identify our key audiences, their interests and media preferences
- Develop a comprehensive marketing strategy and budget
- Grow our mailing lists
- Consistently implement range of marketing activities
- Cost for event coordinator to attend marketing training
- Marketing/ad budget
- Canva and MailChimp subscription costs
- API to connect CRM to MailChimp

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**Unmute & share more examples!**



Check to  
ensure your  
priorities are  
**SMART**

**S**pecific

Are the priority's supporting activities clear and actionable?

**M**easurable

What measures and milestones will help you track your progress? (Capture in work plan)

**A**ttainable

Are you being realistic? Is the priority challenging but achievable?

**R**elevant

Does the priority address your important external, field, or internal insights?

**T**imely

How much can you do in one year? Should the priority be broken down into multiple years?



## Tools You Can Use: Set Up Your Work Plan

### For each priority, note:

- Key actions
- Resources needed
- Assigned to
- Target timing
- Measures and milestones
- Status
- Notes



## Communicate & Implement Your Work Plan Just as Thoughtfully

### After the priority-setting session:

1. Write up and share the priorities with participants
2. Set up the work plan and identify potential leads
3. Meet with potential leads to get their buy-in and input on target timing and measures / milestones
4. Share the final work plan spreadsheet (e.g., Google Sheet) with all assigned leads
5. Determine how and when to share regular updates
6. Monitor status and encourage progress
7. Celebrate milestones and completions!



## Resources You Can Use

- A PDF and recording of this deck
- Inside-Out Thinking Worksheet
- Facilitator's Guide for Priority-Setting Session
- Work Plan Tracking Sheet

Q&A

UNMUTE AND ASK AWAY!

