



**San Diego Social Venture Partners  
Strategic Outcome Planning Resource Team  
Menu of Services**

**Team Leader:** Sherri Neasham

Outcome planning enables an organization to determine measurably the end result desired, define its value to funders and customers, and establish plans with interim milestones to achieve that result. The Strategic Outcome Planning Team assists managers and directors in clarifying the highest value and impact their not-for-profit organization can provide, and also provides consultation on establishing plans which include critical metrics and milestones. For more information or to schedule a meeting, please contact the Team Leader at [sneasham@gmail.com](mailto:sneasham@gmail.com).

The following are focus areas for outcome planning:

	Planning Area	Questions Addressed
<b>1</b>	<b>Defining Success based on Measurable Results</b> <ul style="list-style-type: none"> <li>• 3 Year &amp; 10 Year Vision</li> <li>• Mission</li> </ul>	<ul style="list-style-type: none"> <li>• What impact will we create? How much?</li> <li>• When can we say we've succeeded?</li> <li>• What business are we in? What role do we play in the industry?</li> </ul>
<b>2</b>	<b>Creating Unique Value</b> <ul style="list-style-type: none"> <li>• Market Positioning</li> <li>• Unique Value Offering</li> <li>• Target Funders</li> <li>• Target Populations</li> </ul>	<ul style="list-style-type: none"> <li>• Who do we serve?</li> <li>• How are we unique? In what are we best in the industry?</li> <li>• Who will invest large amounts in the impact we create? Which funding sources do we focus on?</li> <li>• How do we best describe our organization and our services/programs?</li> <li>• With whom will we partner?</li> </ul>
<b>3</b>	<b>Defining Requirements for Success</b> <ul style="list-style-type: none"> <li>• Operating Metrics</li> <li>• Model to Forecast Growth and Expenses</li> <li>• IT Requirements</li> <li>• Marketing/PR Requirements</li> <li>• Board Composition Requirements</li> </ul>	<ul style="list-style-type: none"> <li>• What factors are critical to our success?</li> <li>• How much growth can we handle? What will it cost to expand or enhance services? How can we grow and decrease costs? What can we automate?</li> <li>• What statistics do we need to track and review regularly? What systems do we need to measure and prove results?</li> <li>• Who needs to know of our plans and successes? How will we reach them?</li> <li>• What expertise do we need on the board? What contacts or influence do we need?</li> </ul>

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**Creating Measurable Plans**

- 3 Year Operational Plan
- 1<sup>st</sup> Year Plan
- Quarterly Milestones

- What will we do by when? What major changes will we achieve each year?
- How will we know if we're on track or if we need to adjust? What milestones will we achieve each quarter?