



Monitoring and Evaluation

To ensure the plan is useful regular monitoring and evaluation needs to take place. Key strategies and actions need to be monitored to ensure that they are having the anticipated impact. If not then changes need to be made. A strategic plan is a dynamic tool, not locked in stone until the end of the planning period. External changes may also lead to a review of the plan e.g. changes to funding or staffing or emerging events may require the plan to be re-evaluated to ensure it remains relevant and of use to the organisation.

It is useful to have a regular monitoring meeting – this could be every 4-6 months but as a minimum should happen once a year. If the organisation is going through extensive changes or the external environment is in a state of change, you may want to review the plan more often. Identify someone to take responsibility for organising these meetings throughout the life of the plan. Gather together people who are responsible for implementing the plan and ask them to report back on how well the work is going towards reaching your objectives. You may want to consider if it is appropriate to involve service users – what do they think of the progress?

It may be necessary to amend the plan if there are unforeseen changes or delays.

Questions to ask when reviewing your strategic plan:

How will you know you have been successful?

What are the indicators for measuring progress e.g. service user numbers, feedback by participants of training, specific partnerships established. Use the criteria you agreed in the development of your strategic plan.

Are you making good progress towards meeting your objectives?

If you set targets or milestones (targets that you want to achieve on the way to achieving your final objectives or outcomes), are you on course to achieve these? Are you likely to achieve your objectives? Are there any unexpected outcomes?

Do you need to do anything differently to meet your objectives?

Do you need to change the way the project is delivered, spend more resources, involve other staff?

Are the set timeframes still realistic?

Do you need to change the timeframe because unforeseen events have taken place or new initiatives emerged?

Have we reported on the progress of the plan as agreed?

Is everyone in the organisation still happy with the strategic aims and objectives set and the outcomes achieved so far?

The monitoring and evaluation of the strategic plan lets everyone know how you are going and provides a valuable, regular opportunity to come together to discuss the achievements of the organisation.

Conclusion

Your strategic plan is an important tool and process for your organisation. It will help you focus on the important work you want to achieve and then monitor your work and make sure you are on track. Your strategic plan will demonstrate to all involved in your organisation what you are going to do and how you will achieve this. It will also demonstrate to current and potential funders your expertise and ability to provide high quality services to your beneficiaries.