UPDATING YOUR PLAN FOR THE NEW YEAR

Step 1: Generate and Save Final End-of-Year Report

Before making any changes to your plan, be sure to **generate and archive** a final end-of-year progress report.

- **Save the Full Strategic Plan with Progress:** Go to Reports. Download and save the organization report Full Strategic Plan with Progress. Select Plan-to-Date when downloading to ensure you capture everything.

- **Save Other Reports (Optional):** Save any other reports you commonly use to capture this point-in-time status of your strategic plan.

Step 2: Update "Carry-Over" Goals

A carry-over goal is any goal/initiative/action that will be continuing in to the next planning year. Follow these steps to update carry over goals:

- **Update Goal Description:** Update or refresh the goal description as relevant. For example, a goal may change from "Develop the Communications Plan" in 2016 to "*Implement* the Communications Plan in 2017.

- **Change the End Date:** Update the end date to reflect the new planning year or new due date. There is no need to change the start date as it shows continuity from one planning year to the next.

- **Add Next Year's Target:** Once you extend the end date, you'll see another target box for the upcoming fiscal year. Add next year's target here. You can add periodic (monthly or weekly) targets in the Performance Section.

- **Manage Progress:** Continue to manage your goal as normal for the remainder of the year and into the next planning cycle. Go to the Performance section and update status on carry-over items and consider removing old comments to start the new year with a clean slate.

Step 3: Add New Goals

You will likely add new goals to the plan as new priorities and projects arise. This can of course be done at any time throughout the year, but the start of a new fiscal year is by far the most common time for goal setting.

- **Add New:** New goals and actions are set up the same way as your current goals - in the Plan section of OnStrategy. Click on the plus sign icon to add a new goal or supporting action item.   Pay attention to plan structure to ensure you are adding the new goal/action in support of the appropriate "parent goal."
- **Think SMART:** Follow the SMART Goal setting format to ensure clear accountability, start/end date, and measure/target for the year. Start your goal with an *action oriented* verb and ensure the statement clearly articulates what you intend to accomplish.

Step 4: Plan Clean-up

OnStrategy will hold as many goals and action items as you want, but there is a practical reason to keep your plan simple and clean. Clear out and delete action items that are no longer relevant and determine whether you want to delete completed items or leave them in the next year's plan to show accomplishments.

- **Completed Goals:** If you want to retain the historical perspective of completed goals, be sure they are marked as complete in the Performance section and leave them in the plan. Completed items can be filtered from reports and the dashboard using fiscal year filters, but they remain as part of your overall plan reflecting past accomplishments. OnStrategy platform also has ability to filter completed goals out with the fiscal year reporting tools. (See below for more detail on filtering).

- **Deleting Goals:** Remove goals and action items that are no longer relevant to the new fiscal year. To delete, click on the trash can icon that appears when you hover your mouse over the goal in the Plan section. **NOTE: If you delete a goal, any <u>supporting items</u> will also be deleted.** Be sure to review supporting action items before deleting anything from the plan.