Ausus Partners: Operational Milestones

Proposed Implementation Stages & Milestones

- Strategic Planning Facilitation: Milestone 1
- Assess Current State and Define Objectives: Milestones 2, 3, 4
- Design Metrics Framework and Scorecards: Milestones 5, 8
- Capacity Guardrails (supersedes staffing plan & measurement): Milestone 6
- Establish Org Dashboard & OKRs; Departmental OKRs: Milestones 6, 7
- Integration & Communication: Milestone 0 (staff launch), Milestone 10

M0: Staff Launch
Create ED mandate; set monthly goals for new Development Director; begin Development Playbook (goals, tools, processes); communicate end state/plan to stakeholders.
Artifacts: ED Mandate; intro script & PPT; DevDir monthly goals.

M1: Strategic Planning
Facilitate sessions with CEO, Program Director, stakeholder, and consultant. Define 2–3 mission-aligned priorities and timeline. Create staff-intro script & framework. Artifacts: Strategic priorities document; staff presentation.

M2: Current State Assessment
Assess each department; identify strengths/weaknesses/opportunities/threats. Artifacts: Department mandates; JD analysis; resources used: Ultimate Guide to 1:1s; Meetings from Good to Great; Effective Coaching.

M3: BvA Analysis & Worksheet
Review 2025 account-by-account budget using 2024 spend + 2025 monthly development goals; identify oversight metrics. Artifacts: 2024 BvA; 2025 Q1–Q4 rolling BvA; 2025 account budget.

M4: Define Org Objectives & Metrics
With department heads & stakeholders, define departmental objectives; identify key metrics tied to priorities. Artifacts: 2–3 org Objectives with initial metrics (ED-approved).

M5: Metrics Framework Design
Develop comprehensive metrics framework; ensure relevance/specificity by department. Artifacts: Org & Departmental Metrics (ED-approved).

M6: Capacity Guardrails
Develop guardrails capacity plan per department; quick overview of capacity & availability based on current work. Artifacts: Program caseload ceiling; Admin RACI (transportation, facilities, volunteer scheduling); "load check" checklist for team meetings.

M7: Org-Wide OKR Development
Develop high-level org key results to match strategic objectives; ambitious and measurable. Artifacts: 2–4 organizational OKRs.

M8: Departmental OKR Development
Develop 1–2 OKRs per department aligned to industry metrics & departmental scorecards. Artifacts: Departmental OKRs.

M9: Dashboard Implementation & Feedback
Design and implement org-wide dashboard integrating metrics from each department; ensure useful visualizations & near-real-time insight. Artifacts: Approved & refined Org Dashboard.

M10: Integration & Communication
Integrate org-wide OKRs, dashboard, and staffing guardrails into a cohesive system; communicate end state & plan to stakeholders. Artifacts: Finalized integration report & training materials.