

CASE STUDY

# Maternal & Family Health Services: Everyone Moving in the Same Direction

Three annual planning cycles, one tool, and a strategy that became part of the daily work.

**500+**

Stakeholders Engaged

**\$3M**

Strategy-Aligned Unrestricted Funding

**2+**

Years of Daily Use

**THE CHALLENGE**

## A New Plan Was in Place. A Year Later, It Had Stalled.

By early 2024, MFHS had made it through Year 1 of a new three-year strategic plan, but the leadership team knew something wasn't working. The plan was alive in concept but not in practice. The plan was a set of multi-year goals that lacked clear ownership, a roadmap, or a rhythm for keeping it in front of the team. COO Shannon Hayward describes what tracking looked like in that first year.

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*There were spreadsheets, and there was a meeting where goals were discussed, and then it was basically put on a shelf for a bit. We would take it out and dust it off and say, 'Okay, where are we with this? And who's supposed to be working on this?' There wasn't alignment among the leadership of what everyone's role was in achieving the different goals. //*

— Shannon Hayward, COO, MFHS

**AT A GLANCE**

**ORGANIZATION**

Maternal & Family Health Services (MFHS.org)

**MISSION**

Serving women, children, and families across Northeastern Pennsylvania

**PROJECT**

Three years of annual strategic planning cycles

**PARTNERSHIP**

2+ years

CEO Maria Montoro Edwards and COO Shannon Hayward decided to do something unusual: switch approaches mid-plan. Rather than ride out the existing methodology, they brought StratSimple in to rebuild Years 2 and 3 around fresh stakeholder input and an operational rhythm the team would actually use.

**THE SOLUTION**

## Built on Real Input, Run on a Yearly Cycle

StratSimple started by running a Virtual Interview Survey across MFHS staff, leadership, and board. The AI-driven follow-up questions produced something Maria had never gotten from a traditional SWOT exercise — input that was tied directly to MFHS's mission and community.

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*It wasn't generic. It was very specific to our mission and our community. The questions were honed in on who we are and where we want to go. //*

— Maria Montoro Edwards, CEO, MFHS

From there, the leadership team built annual goals around what they actually heard. Instead of a static multi-year document, MFHS shifted to year-by-year adaptive planning. Shannon called the shift to year-to-year planning a relief.

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*It helped us get more specific and time-sensitive, so the strategic plan wasn't something out there we'd have to respond to at some point. It became part of our everyday work. //*

— Shannon Hayward, COO, MFHS



## CASE STUDY

### Why MFHS Chose This Approach

#### Tailored, Not Generic

The Virtual Interview Survey adapted to MFHS's specific mission and community, surfacing the kind of specific, detailed input leadership could plan against, not the surface-level answers most surveys produce.

#### Year-by-Year, Not Static

Annual goals with regular touch points replaced a multi-year static document, giving MFHS the ability to adjust as the operating environment shifted.

#### Integrated Into Daily Work

The plan moved from a spreadsheet on a shelf to a shared dashboard that leadership uses to make decisions, prepare for meetings, and report to funders.

#### Deeper Input, Not Just More Input

With the plan active and accessible, MFHS could respond to new opportunities quickly, including funder requests that required infrastructure already in place.

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*I don't think we'd be able to be as responsive and nimble in the world we live in if we weren't using StratSimple.*

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— Maria Montoro Edwards, CEO, MFHS

## HOW IT WORKED

### From a Stalled Plan to Daily Practice

#### STEP 1

##### Listening Built for Their Mission

The StratSimple team designed and launched a Virtual Interview Survey tailored to MFHS's mission, audience, and strategic questions. Staff, leadership, partners, and board members responded in their own words, with AI follow-ups probing for specifics where answers were vague. Within days of the survey's closing, MFHS had a synthesized analysis in hand with key themes, representative quotes, and a clear read on where staff, leadership, and the board agreed and where they didn't.

#### STEP 2

##### Annual Goals with Clear Ownership

With the analysis in hand, the leadership team translated the most important themes into a one-year operating plan. Each objective had a named owner, measurable key results, and supporting initiatives that the team now uses to drive progress. The plan informs how leadership talks about progress in their performance conversations, including Maria's own.

#### STEP 3

##### A Plan That Stays Front and Center

Goal owners post updates in the dashboard so monthly staff meetings now open with progress against quarter priorities, and board reports pull from the same source. There's no scrambling to compile updates the week before a meeting.

#### STEP 4

##### Choosing StratSimple Again

Coming into 2026, MFHS had a choice to make: stay with StratSimple, return to the old approach, or shop alternatives. They chose StratSimple again, running a fresh listening cycle and building a new three-year framework with annual implementation planning, all on the same platform.

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*None of the other alternatives Shannon and I had worked with, at this organization or anywhere else, moved us as quickly and as strategically in the direction we wanted to go.*

”

— Maria Montoro Edwards, CEO, MFHS

## THE OUTCOME

### Strategy That Drives Decisions

Two years in, the strategic plan is integrated into how MFHS operates. Team members document activity directly in the dashboard, which functions as the central source for funder reporting, oversight, and internal alignment. Maria checks in regularly to take the temperature of progress and flag anything that needs attention.

The integration showed up clearly in fundraising. For example, when a large foundation approached MFHS in late 2025 with a \$2M unrestricted opportunity tied to nutrition, MFHS could move quickly to capture the opportunity because the strategic infrastructure was already in place.



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StratSimple has enabled us to be flexible. We already had our nutrition infrastructure in place, and it was just a matter of articulating how we’d use the operational funds.”

— Maria Montoro Edwards, CEO, MFHS

When opportunities now arrive, like a grant, a partnership, or a new program, the team has a shared way to evaluate them.



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It’s ‘no’ to things that don’t fit, but it’s also ‘yes’ to things that make a lot of sense, because we’re already working toward a similar path. When an opportunity feeds into one of our objectives or key results, it’s an easy ‘yes’.”

— Shannon Hayward, COO, MFHS

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**The strategic plan is front and center. When we’re talking about anything we’re working on, we tie it back to the plan and ask how it supports a strategic goal or objective. It’s become part of what we do.**”

— Shannon Hayward, COO, MFHS

Ready to simplify your next strategic planning process?  
[Learn More at StratSimple.com](https://www.stratsimple.com)

