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Championing the Strategic Plan Bob Harris, CAE

The board wrapped up its retreat, drafted a strategic plan and intended to officially adopt it at the next meeting.

That's often where plans die. Upon adjournment of the retreat busy schedules take over. The plan is shelved or filed. The saying, "out of sight, out of mind" applies.

There are many reasons a plan might fail, including transition of officers, an unwieldy plan, a board unaware of its importance, or an officer more interested in building a legacy.

To deploy the plan and integrate it into the organization, a plan champion or task force may be appointed. The role is to ensure the strategic plan "takes hold."

Champion the Plan

Just as a board relies on a treasurer to monitor and report on the finances, a plan champion or committee reports on the strategic plan's progress. The intent is to keep the plan foremost in the minds of directors, committees and staff.

Strategic Plan Champion – A member of the board who is close to the chief elected officer (often the person most likely to next ascend to the position) accepts the role of plan champion for the year. He or she monitors and reports on progress, making sure that the plan is not lost or waylaid in favor of personal agendas or distractions. When progress is slowed the champion will question why.

Task Force on Strategic Plan Implementation – This is an appointed small group of board volunteers to maintain focus on implementation. They may develop innovative methods to keep the plan front and center. Staff may be added or consult with the committee. The task force serves until they are confident the plan has been integrated into the association.

These are suggested action steps after the plan is adopted:

- Adoption** – Ensure the board understands and adopts the new multi-year plan by a motion at an upcoming board meeting.
- Agendas** – Revise the board agenda to ensure the plan receives attention periodically at meetings and time is allotted for discussion of the goals.
- Engagement** – Develop tools to maintain board interest in the plan. Suggest keeping the actual plan on the board table, displaying it on the conference room

wall and/or creating wallet cards with a summary of the plan for volunteers to reference and distribute.

- ❑ **Awareness** - Transform the plan into promotional materials to inform members and the community. Create graphics and design a brochure or PDF for members and prospects, post on the website, and/or create a banner of the new mission, vision and goals.
- ❑ **KPIs** – Study and set key performance indicators (KPIs) for measurable elements of the plan. KPIs may include growth goals, deadlines for completing work, and assignments to committees, staff and consultants. Transform the KPIs into a dashboard of 8 to 12 major elements the board can monitor. For example, if the plan calls for membership growth of 200 new members within 3 years the staff will break that down to be 66 new members per year or 12 per quarter.
- ❑ **Staff Alignment** – Be sure staff understands they are part of the team to advance the plan with board and committees.
- ❑ **Tracking** – Staff may create a tracking tool to become their office work plan. It takes the format of a horizontal template or spreadsheet that includes columns for the goals, strategies, tactics, KPIs, assignments and deadlines. The most popular method to report the tracking is with a “stoplight” concept. Green indicates progress or ongoing; amber indicates there may be needs such as resources, funding, time, delays or questions. Red indicates the effort has come to a halt or delay.
- ❑ **Reporting** – Ask the chairman of the board to allocate time to report on progress or problems. The board should anticipate updates and celebrate achievements.
- ❑ **Annual Review** – At least annually review the plan among board and staff. Also the membership will appreciate knowing how the board has advanced the plan that was announced a year earlier. The plan will be the foundation for an Annual Report.

The plan acts as a safeguard against mission creep. “Good ideas” will arise at meetings that are accelerated by passion and group think (“I voted for it because I thought you were going to vote for it.”)

The plan keeps the board on track. If a priority or crises arises the plan may be delayed but the champion or task force will ensure attention returns to the plan.

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Note: Bob Harris, CAE, provides governance tips and templates at www.nonprofitcenter.com.