

Cleared for Takeoff!

Flight Plan for the Strategic Plan
Bob Harris, CAE

The planning retreat has ended. Everyone was enthusiastic about the new direction and ideas. But as the planning team returns to their offices --- most forget their commitment to the new strategic plan.

This “checklist” is similar to an airline pilot’s flight plan and pre-flight checklist. Things have to be done in order and at the right times to be successful. For instance you can’t load the passengers but forget to fuel the plane. Similarly you cannot create the plan and then forget to align committees or monitor its progress.

After the strategic planning retreat the organization is “cleared for takeoff.” Follow these ideas to successfully launch and implement the plan.

Use the flight plan and schedule to integrate the strategic plan.

Immediately After the Planning Retreat

- Circulate a **draft** of the plan within 10 to 14 days so leaders can see the results of their discussions and decisions. When the plan is still fresh there may be other good ideas that come to mind.
- Share the plan with **staff** to enlighten them about discussions and decisions at the retreat. This will reduce anxieties about what the board did and invite their input.
- Present a **final draft** of the strategic plan at the next board meeting. Have the **motion** approved as the official roadmap for the organization by a motion of the board.
- Inform members**, communities and stakeholders of the new plan. Describe enhancements to the organization, new ideas and direction (supporting ROI.) Do this through articles, the website, announcements and dissemination to components, where applicable.

- ❑ Publicize the report with **collateral material**. Transform the typed pages into a brochure that informs members, prospects and sponsors of the organization's direction. Promote the plan using a brochure or PDF at meetings, on the website and in new member kits. Design an information card or bookmarks with the new mission, vision and goals, plus contact information. Distribute them liberally.
- ❑ Most **membership brochures** can benefit from a fresh look. After creating a strategic plan brochure, consider creating a membership brochure that complements the plan. This ties joining and renewal to the organization's mission, goals and strategies.
- ❑ If there are **components**, give them tools to inform local members about the strategic direction. Provide copies of the plan, collateral and a PowerPoint.
- ❑ Add the plan to the **website**. Too many organizations include history and bylaws on their website but fail to promote strategic direction.
- ❑ Appoint a **plan-champion**. Similar to the treasurer overseeing the budget, the plan-champion monitors progress on the plan. Consider the president-elect for this role.

At Three Months

The plan should be integrated into the organization. It will have an impact on nearly every aspect.

- ❑ Align the plan with the **budget**. The budget is not the driver of the organization, but the reverse. The strategic plan should both generate and expend funds through programs and projects.
- ❑ Under each goal the **committees** should be aligned. A strategic goal without a committee or champion is likely to fail. Be sure committees have a copy of the strategic plan in their folder so they are always working to advance the strategies and goals.
- ❑ The **staff** or departments will want take "ownership" of elements of the strategic plan.
- ❑ A **business plan** is a tool to set tactics and metrics related to the strategic plan. It will identify specifics, deadlines and persons or committees

accountable in the next 12 months. The staff creates the business plan (program of work).

- The **board agenda** should include elements of the strategic plan. The aim is to transition the traditional agenda that includes reports and updates to a focus on mission and goals. Keep the plan in front of the board at every meeting.
- At board meetings include the **mission statement** on the wall, board table or the back of the name tent cards. When directors propose ideas for new projects, reference the mission and plan and discuss what might have to be dropped if new programs are undertaken.

At 12 Months

- **Review** the plan in full at the annual board orientation to report on progress and expectations for the year.
- Appoint a new **plan-champion**. Ideally the president-elect had that role; as he or she moves into office with complete knowledge of the plan, the new president-elect becomes the plan's champion.
- Update the **program of work** with revised deadlines, metrics and assignments.

At 3 Years

- Internal and external environments have changed since the plan was developed. Schedule a board retreat to craft a **new plan**, built upon the prior goals¹.

Use the checklist as a flight plan to successfully implement the strategic plan.

#

Note: Bob Harris, CAE, provides free governance tips and templates at www.nonprofitcenter.com. He conducts board development, facilitates strategic plans and consults on organizational performance. Checklists are a means for consistent application, staff empowerment and sustainability.

¹ When a plan is done well, it is anticipated that the organization's goals (core competences) will remain similar – it is the *strategies and tactics* that are likely to change at successive retreats.