

Keeping the Strategic Plan Front and Center

Bob Harris and Lou Figueroa

Most strategic planning retreats end with plenty of enthusiasm and good ideas. But then everybody returns to their offices and the phenomenon of “Monday morning” comes around. Priorities arise and deadlines loom, making the strategic planning discussions a low priority. Sometimes the plan is simply put in a notebook to collect dust.

There are many approaches to ensure the plan becomes an integral part of governance and management.

- **Summarize** – Create an executive summary of the plan. A lengthy plan with attachments is distracting. It is said that busy volunteer leaders seldom have time to read past page two.
- **Graphics** – A diagram or stylized words will help readers understand the plan at a glance.
- **Promote** – Tell members and stakeholders about the new plan. The concept is that once goals and strategies are committed to paper and promoted they are more likely to be achieved. Publicize the plan in a newsletter, create a brochure and email a PDF of the plan to members.
- **Program of Work** – The strategic plan represents high level thinking. Reduce the plan into a program of work or action plan. It is often in the format of a horizontal table identifying each goal, strategy, performance measure and assignment.
- **Plan Champion** – Appoint a member of the board to monitor and report on progress. Similar to a treasurer reporting on finances, a plan champion reports on the strategic plan. The best plan champion is often the president-elect or vice president.

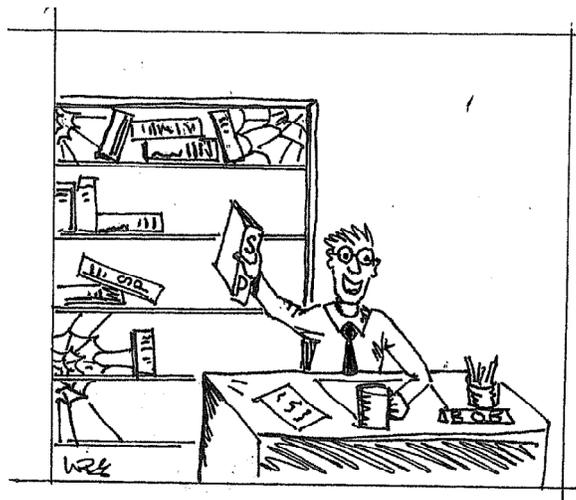


- **Lamination** – It is said that if it is laminated it must be important. Keep the plan on the board table to be sure it stays in the minds of directors.
- **Board Agendas** – Reformat the board agenda by adding the goals and reducing the line items called “reports and updates.” Any calls for action by committees or staff should align with the strategic plan.
- **Integration** – The new plan will an impact in areas such as budgeting and marketing. Be sure to make adjustments based on the plan.
- **Website** – The plan should be a compelling reason for members to renew and prospects to join. Place it near the front of the webpage to answer the question, “What does the organization do for me?”
- **Annual Review** – At the annual orientation of the board of directors discuss the plan progress.
- **Update** – About every three years the plan should be reviewed and updated. Don’t throw away the old plan. If the prior planning session set the right goals, they are likely to remain the same and the strategies will adjust as the environment changes.

There are many approaches to keeping a strategic plan front and center.

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Note: Bob Harris, CAE, facilitates strategic planning. Lou Figueroa is the founder of a foundation for amputees in California.



Well, that's a wrap on this years strategic planning.
Might as well put it with the other ones.