After the Strategic Planning Retreat

After the retreat a summary report is prepared. Follow these steps for implementation.

Immediately
A. Circulate the draft report to directors for final input, while discussions are fresh on their minds.
B. Share the plan with staff to enlighten them about discussions, reducing anxieties for those who could not attend the retreat.
C. Seek a motion to officially approve the document at the next board meeting.
D. Where no keep performance indicators (KPIs,) performance measures, deadlines or assignments were set at the retreat --- add them to ensure accountability and implementation.
E. Promote the plan for stakeholder awareness through a news article, website and/or member brochure.
F. If there are components or chapters, describe the plan and suggest it be used as a framework for their program of work.
G. Appoint a plan-champion to monitor progress, and report at meetings; consider the president-elect for this role.

Within 3 Months
A. Review the budget; the strategic plan may result in an increase or expenditure of funds.
B. Align committees and task forces with goals to be sure there is volunteer talent responsible for advancing programs and activities.
C. Staff should operationalize the plan, taking “ownership” for goals within their areas of responsibility.
D. Create a program of work or business plan for the next 12 months to list and track assignments, deadlines, interim performance, etc.
E. Add a “strategic plan report” on the board agenda; always keep a copy on the board table.

At 12 Months
A. Review the plan at the annual board orientation.
B. Update the program of work with revised deadlines, metrics and assignments, yearly.

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 goals, about every 3 to 5 years.

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1 To execute; including keep performance measures, timelines, accountability and assignments.
2 When a plan is done well, it is anticipated that the organization’s goals (core competences) will remain unchanged at the next planning retreat—it is the strategies and tactics that are likely to change at successive retreats.