Implementing the Strategic Plan

By Bob Harris, CAE

The retreat ends and almost everybody called it a success. Now there are choices that require attention: Do I put it in a notebook and file it? Should I ask officers staff to create metrics based on the plan? Do I use the plan and as a basis for creating a 1-year program of work? Do I tell stakeholders about the new plan?

Check off these steps for effective implementation of the new strategic plan.

✓ Mark the plan “draft” and circulate one last time for further input, understanding and correction (within 30 days.)
✓ Adopt the plan officially at the next meeting of the board (within 90 days.)
✓ Announce the major goals of the plan by posting on website, press release, newsletter articles and presentation to constituents at an annual meeting (consider PowerPoint format.)
✓ Translate the strategic plan into a business plan for management staff to follow.
✓ Adapt or revise the budget to reflect the new strategic plan.
✓ Sunset unnecessary committees, align committees with the major goals and charge them with the strategies within the goals.
✓ Outsource work that needs to be delegated beyond the staff and or volunteer capabilities.
✓ Appoint a plan champion from leadership or staff to monitor and report progress on the plan periodically or at each board meeting. (Consider having a strategic plan-report on the board agenda.)
✓ Review the progress on the plan at an annual retreat of the leadership and staff. Update entire plan at least every 3 years.

The plan is one of the key documents to guide leadership, staff and committees. Investing in a planning retreat but not relying on the plan is pointless. Execute the plan for a successful organization.

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