Strategic Planning Resources
Bob Harris Summer 2018

- Guide to Strategic Planning
- Do We Really Need a Strategic Plan?
- Checklist: Strategic Plan Implementation
- Strategic Plan Champion (Sherpa)
- Terminology and Methodology of Planning
- False Starts!
- After the Planning Retreat
## Why Have a Strategic Plan

1. **Roadmap** – The plan identifies the “destination” and guides the board of directors, committees and staff.
2. **Continuity/Sustainability** – Without a plan, the organization is susceptible to mission drift and simply being reactionary.
3. **Prioritization** – Planning allows leaders to identify the important issues and programs; and to drop programs that are ineffective or irrelevant.
4. **Allocation of Resources** – Planning is the disciplined allocation of resources (time and money).
5. **Assignment and Timelines** – Good plans include performance measures and assignments indicating how and when projects will be done.
6. **Awareness** – The plan should be compelling to members and stakeholders.

## Terminology of Planning

- **Mission** – The purpose for existence; crisp sentence or two – easy to articulate.
- **Vision** – Statement of aspiration; how the organization will be perceived.
- **Values** – Guiding principles of the leadership and staff.
- **Goals** – The core competencies to which resources will be allocated. In setting goals, consider the acronym SMART - Specific, Measurable, Attainable, Relevant and Timely.
- **Strategies** – Approaches and programs for achieving the mission and goals.
- **Tactics** – Assignments, accountability and deadlines.
- **Performance Measures** – Methods to measure progress.
- **Business Plan** – An annual detailed program of work linked to the strategic plan.

## Trends in Planning

- Set just 3 to 7 goals; allowing the organization to focus efforts on its core competencies.
- A mission statement that is visionary can replace the need for separate mission and vision statements.
- Promote the plan to members and prospects by converting it to a brochure or posting on the website.
- Report on the plan’s progress by reviewing at board meetings and at least annually.

### Span of the Plan

**3-5 Years**

Most plans span three years. Planning annually tends to cause short-term thinking. Plans exceeding 5 years may be unrealistic in rapidly evolving environments.

### Planning Retreat

With preparation, focus and the right set up, a strategic plan can be developed in a day or two. Because discussions will be intense, it is best to do the plan over two consecutive days --- giving everyone a relaxing break after the first day.

The room should be set up in an open-U, with a flip chart at the front. Ensure that seating is comfortable, and food and amenities are nearby. Natural light is preferred to a room without windows.

### Brand Statements

The mission, as well as vision and values, serve as a “promise” to the community. The statements...
help to distinguish the organization. While the vision and values are optional, the mission or purpose statement is required.

**50,000 Foot Perspective**

Encourage discussions to remain at the 50,000 foot level. There is a tendency for discussions to drop to 25,000’ (committee work) or lower, say 10,000’ (staff work and tactics.) Leave the tactics to committees and staff. Stay out of the “weeds” at the planning retreat.

**Facilitation**

An experienced facilitator involves everybody in discussions, while focusing on completing the planning in the time allotted. There are disadvantages to having the staff or a board member facilitate. A plan’s success may be linked to the right facilitator. Provide the facilitator with all the information they need to understand the organization.

**Environmental Scan**

Planning is not done in a vacuum; there are environmental influences. Directors should be qualified to recognize trends and community needs. Often the discussion is built around the acronym SWOT – Strengths, Weaknesses, Opportunities and Threats.

Surveys and focus groups may be conducted to gain valuable stakeholder input.

**Strategy or Tactic**

*What’s the Difference?*

Strategies are innovative approaches to achieving the goals. They are often identified as programs, issues, priorities, benefits, events and services.

Tactics are a lower level discussion – how will it occur, who will do it? Tactics are the responsibility of committees, staff and consultants. Tactics are usually set after strategic planning.

**Precautions**

Plans fail for many reasons:

- Too many people at the planning retreat; 15 to 20 are ideal for meaningful discussions.
- Too many goals – simply a list of what the board wants to see finished. Successful organizations focus on just 3 to 7 goals.
- Short term thinking; it’s not a strategic discussion if leaders cannot think beyond their terms of office.
- An inexperienced facilitator or one with a personal agenda.
- No final report formatted as a strategic plan.
- Meetings over several months rather than completing the plan in one sitting.
- Distractions during the planning meeting.
- The wrong people at the planning table; it is a responsibility of the board of directors who should be visionary leaders.
- Failure to include performance measures and timelines.
- Leaders and staff ignore the plan and go back to doing things as before.

**Implementation after the Retreat**

There will be a temptation to put aside the new plan and return to daily tasks. Focus on implementation and integration into the culture of the organization.

- Appoint a “Plan Champion” to monitor and report on progress.
- Align every committee under the goal areas.
- Add performance measures and deadlines.
- Promote the plan to members and stakeholders.
- Create a yearly program of work for committees aligned with the strategic plan.
- Promote the plan at meetings and on the website.
- Include the plan on the board agenda.
- Conduct an annual review of progress.
- Share with the staff to get their buy-in of the board’s strategic direction.

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Do We Really Need A Strategic Plan?
Bob Harris, CAE

The newly elected president walked into the executive director’s office to discuss the year ahead. He brought a notepad filled with 13 projects to achieve before his term ends.

How might the executive respond?

Start by thanking him for sharing his priorities. Follow that with, “Let’s look at our strategic plan to see how your projects fit.” The aim is to show that his interests might already be part of the strategic plan or to discuss how they can fit.

If they don’t align the discussion might ensue, “What should we adjust in our existing plan to integrate your goals so as not to exhaust our resources?” The conversation would benefit by including the executive officers.

The approach shows the importance of a strategic plan to guide the association through successive leadership, avoiding year to year distractions.

Strategic Planning is NOT Dead

You might have heard, “Strategic planning is dead.” The statement is not meant to for associations to abandon planning. Simply the processes and outcomes have evolved.

Planning retreats are opportunities for directors to consider the future. It is different from board meetings where attention is generally focused on the current year.

Planning that used to take months or weeks can be done in less than a day with proper preparations. Reports that were 20 to 100 pages have been pared down to a page or two. Rather than starting anew at every retreat, boards have realized it’s smart to build upon the prior plan.

Terminology has changed. Strategic drivers might be set to frame decision making. Mission and vision statements have been combined. A plan champion or Sherpa may be appointed to monitor and report on progress. Staff track progress on a program of work.
Association GPS

The plan sets a destination and describes a roadmap. Consider it the organization’s guiding GPS – goals, priorities and strategies.

The road map should be the primary guide for board, committees and staff. When proposals are made, directors should question, “Why are we talking about this if it is not in our plan?”

Staff Rely on a Plan

Several association executives offered perspectives on planning:

There is an old adage, “If you don’t know where you are going any road will get you there.” The strategic plan is our road map which, when properly used, will focus and prioritize the financial and human resources to meet significant goals and objectives, explains Glenn East, CAE and executive director at the Northeast Florida Association of REALTORS®.

At the Retail Association of Maine, CEO and CAE Curtis Picard says, "Having a strategic plan with 3 to 5 clear goals enabled us to focus our limited resources on the things that matter. While it is sometimes easy to say yes to an idea, the strategic plan gave us the criteria to determine if it was mission critical or not. Finally, the plan made our board meetings run much more smoothly once we centered the agenda on the specific goals.”

Erica Huffman, CEO at the Escambia County Medical Society avows, “Having a strategic plan gives the association a sense of direction. It is a road map and without it, it is easy to get lost among the variety of task and projects the association manages.”

Charlene Wandzilak, executive director at the Pennsylvania Veterinary Medical Association offers, “Having a strategic plan which is referred to regularly and monitored for progress helps provide a vital road map for times when the organization wants to overcommit itself and not focus on its true purpose or tries to be all things to all people. It also provides direction on where to focus resources, energy, time and effort to make the most impact for our members and our organization’s overall success.”

The San Diego County Dental Society’s executive Michael Koonce, CAE says, “The plan is our primary guide. It’s our association’s mandate on what it is we want to accomplish and our staff’s marching orders on where and how to focus our time. If done right, it’s also the measure of whether or not we are successful. I can’t imagine working without one.”
Overcoming Objections

Some boards refute the value of planning. The most common reason, “We just don’t have time for a retreat.”

Planning retreats got a bad rap because they began with games, trust-falls, and group hugs. Directors roll their eyes when they are told to stand up and pick a partner.

Some directors dislike having a plan because they prefer to offer suggestions at will. Without goals to frame board work, the discussions fall to the latest crisis, personal priorities or the “good ideas” tossed on the board table.

Another objection is cost. Hosting a retreat and compensating a facilitator requires a budget. If the price seems high, remember most plans are for three years or longer – amortize the amount over three years and it’s a small cost for a roadmap.

When the board says we don’t need a plan, use this rationale:

- Planning retreats require an investment of time, though an effective plan can be developed with advance work in under a day.

- A plan lends support to advocacy. The description of the organization and its priorities demonstrates how the organization benefits the community and society.

- A plan should always be on the board table. Transform the plan into a placemat format, laminate it, and keep it front and center at meetings. As ideas are offered, check how they fit in the plan or what must be adjusted to accommodate a new program.

- The plan is integral to membership recruitment and renewal. It should answer, “Why belong?” Members should know of the organization’s goals and strategies.

- Incoming directors should ask, “Where is the strategic plan, our job is to advance it.” Directors offering “good ideas” or hoping to leave a legacy is counter-productive.

- Staff rely on the plan to align work with board priorities. A staff developed business plan supports the board’s strategic plan.
• Committees need to be familiar with the plan so their work can advance its elements.

• The plan tracks progress and performance. Without a plan efforts may go in any direction.

• The plan is as important as the governing documents and budget; directors should read them all to fulfill fiduciary duties.

• The planning retreat is not just about adding new ideas; it is a time to evaluate programs and drop what has low relevance.

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Note: Bob Harris, CAE, provides free governance tips and templates at www.nonprofitcenter.com.
Implementing the Strategic Plan
Bob Harris, CAE

The planning retreat is an important activity for reviewing and developing strategy and direction. During the retreat enthusiasm builds for new programs and growth. After the retreat everyone returns to their daily priorities. The retreat is just a memory.

Here is a checklist to deploy and sustain progress on the strategic plan.

- **DRAFT**: Circulate the final draft of the strategic plan to board and staff decision makers to check for accuracy.
- **ADOPTION**: Official adoption of the plan by a motion of the board at the next meeting; within 90 days.
- **AWARENESS**: Announce the plan’s major goals by posting on website, press release, newsletter and presentation at an annual meeting (consider PowerPoint format and printed handouts – the most well-read and membered plan will fit on a business card.)
- **ACTION PLAN**: Translate the strategic plan into a business or action plan detailing the assignments to committees and staff; adding deadlines.
- **METRICS**: Identify performance measures so progress can be measured and success recognized.
- **RESOURCE ALLOCATION**: Adapt or revise the budget to reflect the recommended programs in the new plan.
- **CHAMPIONS**: Appoint a strategic plan champion, or goals’ champions, to monitor and report on progress.
- **COMMITTEES**: Align committees and task forces with the goals to ensure volunteer workforce supports each goal. Merge or eliminate unnecessary committees.
- **CONSULTANTS**: Outsource work that needs to be delegated beyond staff or volunteer capabilities.
- **REPORTING**: Allocate time to report on progress (or delays) in the strategic plan. Consider a color-coded system such as GREEN – underway; AMBER – progressing; RED – completed or needs attention.
- **UPDATE**: Annually review the plan in-depth. In three years develop an updated plan.

The plan is a roadmap for leadership and staff. It should be integrated into all aspects of the organization.

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bob@rchcae.com  -  Spring 2017
The board held a retreat every few years. Directors described it as valuable and a way to meet other members. Though a plan strategic plan was developed, come Monday morning nobody gave the plan much thought. It went on the shelf with the other plans.

An organization relies on a strategic plan to set priorities, align resources and advance the mission statement. It is an important document drafted and approved by the leadership. It will guide successive boards, the committees and staff.

To avoid failure after the retreat, rely on a “plan champion” to keep it front and center.

It is not a document intended to steer the staff. Staff rely on their own program of work or annual business plan.

**Budget Similarity**

The concept of a budget is similar to a strategic plan. The board approves an annual budget and receives updates at meetings. The treasurer is responsible for reporting on progress and changes in the financial picture.

Similarly, the strategic plan belongs to the board. Directors should expect to review updates and progress reports.

Rather than asking staff to report on the plan, appoint a member of the board to serve as a plan champion. The chief elected officer periodically grants time to the plan champion. It should be an item included on the meeting agenda.
A plan champion is like a Sherpa, a Tibetan who serves as a porter on mountain-climbing expeditions. In governance, a person appointed to guide a special project.

Why the need for a Sherpa? Circumstances will arise where other priorities trump the strategic plan, it may be a political issue or crisis. It is easy to forget that a plan exists.

There are varied techniques for monitoring and reporting on the plan.

**Plan Champion** – A member of the board appointed to ensure that the strategic plan is included in all elements of the organization. He or she works with staff to give periodic updates. Often the best plan champion is the vice president or vice chair who will move into the chief elected position. Each year the role transitions to the board’s number two position.

**Goal Champions** – Multiple goal champions may replace the need for a single champion. They are assigned to each of the plan’s core competencies. Most plans have four to seven goals, thus that number of directors would serve as goal champions.

The Bakersfield Association of REALTORS® refers to them as “Oversight Officers.” The role is defined as “watching over and responsible for the work being done by the committees associated with each goal.”

“The positions serve as a resource to the board president, tracking committee performance, aligning work with the plan, managing resources and ensuring implementation to benefit members and the community,” said Linda Jay, RCE, CEO of the association.

**Committees**

It is vital that committees be aligned with the strategic goals. Upon completion of the plan, analyze the volunteer workgroups.

There may be opportunities to merge committees, eliminate or appoint new task forces to advance the goals. A goal without a committee is often simply more work for the staff.

**Program of Work**

While the board focuses on the longer-range strategic plan, the staff may develop a closely aligned program of work. It focuses on the immediate year ahead.
Its format is often a horizontal table or spread sheet to track assignments, progress and deadlines. Sometimes it is called a business or action plan. It is task oriented whereas the board should be goal and mission oriented.

Without a Sherpa a strategic plan may fail.

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Terminology and Methodology of Strategic Planning  
Bob Harris, CAE

Nearly every organization relies on a strategic plan. It’s a multiyear roadmap focusing energy on gaining achievements.

Without a plan, day-to-day administrative tasks become priority. Significant goals are seldom reached. Mission creep may occur without focus on mission and vision.

Planning Team

The process for developing a plan includes convening a group of innovative, visionary and strategic thinkers. Because the activity occurs infrequently (about every three years) there is a need discuss the terminology and process.

The ideal number of people is less than 20. A larger group is difficult to maintain attention and slows the process.

A small group may limit input. The aim is a group size that allows for meaningful conversations. If there is a desire to involve more people, do it with advance surveys and focus groups.

Idea Generation

Attendees are likely to offer “new ideas.” They want to leave their imprint on the plan. Remind everyone that it is just as important to delete or improve programs rather than adding new ones.

The challenge of new ideas is how they “fit.” For instance, are they suggestions goals, strategies or tactics?

Be mindful of the statement, “I don’t know how this fits but I’m going to throw it on the table.” A contributor may not have considered aspects such as resources, performance measures and alignment.

Terminology

Familiarization with the planning terminology is the starting point.
Begin the meeting by defining terms and context. For example, how does a strategy affect a goal? What’s the linkage between vision and mission statements?

This terminology applies to strategic planning globally:

**Vision** - Inspirational statement about the future; often focused externally on results that improve society or the community.

**Mission** – Communicates the reason for existence; identifying the stakeholders, relevance and outcomes. Brief is better.

**Values** - Organizational principles that guide decision making; often serving as a filter for discussion.

**Goals** - The core competencies or pillars of the organization to which resources will be allocated. Generally just three to six for laser focus. Align committees with goals.

**Strategies** – Fresh and continuing approaches, programs and priorities to achieve the goals.

**Tactics** – The more precise steps to advance the strategies; generally the role of committees.

**Metrics and KPIs** - Performance indicators set to monitor progress. Include timelines, deadlines and assignments. Track on a matrix or spreadsheet. Report as scorecard or dashboard.

After terminology is understood, approach the process methodically. Start with an affirmation of the vision and mission, moving to the more specific elements such as strategies and metrics.

**Model Plan**
This sample plan demonstrates the fit and flow of the elements. It places vision first, recognizing it is an aspirational outcome for the community. Followed by the mission identifying the organization, its members and services. From there follow values, goals and strategies.

This plan will guide successive boards and answer the frequent member question, “What do you do for me?”

It is succinct; easy to communicate and reference at board meetings. It should be of interest to members and stakeholders. This public plan is supported by a longer document that aligns committees, promotes accountability and sets deadlines.

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Boards can be resistant to think strategically. Some finding it easier to focus on the short term thinking and safe topics.

A few boards consider planning an expensive process. Others fear the group hugs and games that characterize some retreats. Even the boards that have budgeted for planning often delay it a year or more.

Reports say that up to 50 percent of strategic plans fail. Here are 13 (unlucky) false starts and failures in the process.

1. **Annual Planning** – A strategic plan should span 3 to 5 years. If planning occurs every year it becomes a short term plan associated with the current chief elected officer. When directors know the organization plans annually, they seldom think beyond the year, “We don’t need to think long-term because we will be doing this again in 12 months.” The plan should be considered “rolling” for a period of at least three years to guide the board, and reviewed for progress annually.

2. **Too Many Planners** – The IRS suggests that the size of an exempt board of directors should facilitate meaningful conversations. Too few people may limit ideas. Too large may draw out meetings with so many people providing input. The dynamics are far different for a group of 15 persons versus 30 or 40. The right size planning team is usually 15 to 20 strategic thinkers. If the desire is more input, conduct advance focus groups or surveys. Every 4 extra people at a planning meeting tends to add an hour to the schedule so that everyone can be involved and heard.

3. **Meeting Environment** – From temperature to natural light, the room environment is critical. Squeezing too many people into a dimly lit room will have a negative impact on outcomes. Avoid basements, dark narrow rooms; be sure the room temperature can be controlled and there is space to spread out (people and breaks.)

4. **Table Arrangement** – An open-U arrangement allows everyone to sit at the same table, easily hearing and watching what is said. (Observing body language is key in strategy development as directors might have good ideas but their micro-cues indicate otherwise.) Place a flip chart or screen at the open end of
the table. Consider a room with enough space to accommodate several rounds in the back of the room for breaks, meals or small group work.

5. **Terminology** – Many of the participants may never have been involved in strategic planning, while others come from an environment that conducts planning but uses terms unique to their settings. Understanding and agreeing to the words associated with nonprofit planning is critical. Otherwise, directors provide input but don’t know whether they are offering a goal, strategy or tactic. Keep a terminology card on the table that defines: Mission, Vision, Values, Goals, Strategies, Performance Measures and Tactics.

6. **Wrong Season** – It would be unwise to conduct strategic planning in the middle of the current term of office when the chief elected officer’s year is underway. An ideal time for planning is as the current term comes to a close. This allows incoming officers to create a plan and then have a month or more to consider implementation (assigning committees, adjusting budget, etc.) Or conduct planning immediately at the start of the new term. There should be linkage between planning and budgeting.

7. **The Right People** – The wrong people can doom the process. It is a responsibility of the board of directors. If the board is large or all directors are not strategists, pare down the number. Avoid an imbalance of past presidents or chairs – the meeting is about the future. Find ways to include visionaries, emerging leaders, representatives of diversity those who embrace technology.

8. **Plan Report** – The final plan should not be measured by the number of words or pages. Some of the best plans can be summarized on a business card. Be sure the report is drafted within a few days of the retreat and shared with participants so they can see results of their volunteer time. Avoid adding “fluff” to the report that includes pages of reports, the environmental scan (SWOT), agendas or survey results. Let the plan stand on its own as a report about how the organization plans to advance its mission and goals. (Remember that busy people seldom have time to read more than 3 pages before they are interrupted; shorter is better.)

9. **The Facilitator** – The facilitator is charged with keeping discussions on track and completing the task at hand – development of a multi-year, visionary, compelling strategic plan. Be leery of the board that asks their executive director to facilitate. The executive should be a participant at the table, not the note taker. Be cautious about the elected leader who wants to facilitate or has someone from his or her company lead the meeting; it is likely to be a conflict of interest and may diminish honest dialog. Identify a facilitator who fits your culture and understands your desired outcomes.
10. **Level of Discussion** – One might characterize board discussions at the 50,000 foot level --- visionary, strategic conversations that reach into the future. That would position committees at about 25,000 to 35,000 foot and staff at about 10,000 foot (defined by the IRS as “implementing the decisions of the board.”) At strategic planning, conversations should be 50,000 foot and higher. It is not the place to question the price of coffee breaks or whether the office needs painting.

11. **Number of Goals** – Most organizations can hone down their priorities and projects to just 3 to 7 goals. A wise director at the planning table once reminded, “None of us will remember more than four goals so we should stop now.” Nearly every organization can advance their purpose with 3 to 5 well considered goals. Each goal will be supported by several fresh and on-going strategies to which resources must be aligned.

12. **Realty Check** – Planning should be based on reality and capacity. Brainstorming with limited resources (funds, volunteers, committees, technology and staff) is unproductive. Strategic planning can be described as the “disciplined allocation of resources.” Be sure the facilitator and planning group are familiar with resources before setting goals.

13. **Deployment** – Most planning retreats occur over weekends; Monday morning may be the death of the plan. There are a series of steps that must occur soon after planning for implementation; including: alignment of committees, stakeholder awareness, program of work, and periodic progress reports.

Understanding the false starts and traps will improve likelihood of success.

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**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\(^1\) 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\(^2\), 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.
False Starts - 13 Ways to Blow Strategic Planning
By Bob Harris, CAE

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9. **The Facilitator** – The facilitator is charged with keeping discussions on track and completing the task at hand – development of a multi-year, visionary, compelling strategic plan. Be leery of the board that asks their executive director to facilitate. The executive should be a participant at the table, not the note taker. Be cautious about the elected leader who wants to facilitate or has someone from his or her company lead the meeting; it is likely to be a conflict of interest and may diminish honest dialog. Identify a facilitator who fits your culture and understands your desired outcomes.
10. **Level of Discussion**  – One might characterize board discussions at the 50,000 foot level --- visionary, strategic conversations that reach into the future. That would position committees at about 25,000 to 35,000 foot and staff at about 10,000 foot (defined by the IRS as “implementing the decisions of the board.”) At strategic planning, conversations should be 50,000 foot and higher. It is not the place to question the price of coffee breaks or whether the office needs painting.

11. **Number of Goals**  – Most organizations can hone down their priorities and projects to just 3 to 7 goals. A wise director at the planning table once reminded, “None of us will remember more than four goals so we should stop now.” Nearly every organization can advance their purpose with 3 to 5 well considered goals. Each goal will be supported by several fresh and on-going strategies to which resources must be aligned.

12. **Realty Check**  – Planning should be based on reality and capacity. Brain storming with limited resources (funds, volunteers, committees, technology and staff) is unproductive. Strategic planning can be described as the “disciplined allocation of resources.” Be sure the facilitator and planning group are familiar with resources before setting goals.

13. **Deployment**  – Most planning retreats occur over weekends; Monday morning may be the death of the plan. There are a series of steps that must occur soon after planning for implementation; including: alignment of committees, stakeholder awareness, program of work, and periodic progress reports.

Understanding the false starts and traps will improve likelihood of success.

#  #  #

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