Who Needs a Strategic Plan?
Bob Harris, CAE and Matt Harrington, CEO

In a meeting with a dozen executive directors, a colleague said, “Who needs a strategic plan anymore? That stuff doesn’t work.”

From the nods and statements of other executives, the rest of the room seemed to concur. It was incomprehensible. I thought, “No strategic plan?” My heart sank.

How can we expect volunteer leaders to advance a mission and priorities if there is no roadmap? Do they adjust their priorities at each meeting? React to a crisis of the month, or wait for the current chair to identify his or her legacy projects?

The documents that guide nonprofit boards include a strategic plan. The guardrails of good governance are the mission statement, articles of incorporation, bylaws, policies, multi-year strategic plan and the annual budget.

During lunch we exchanged beliefs with the executives. “Strategic planning is crucial to the success of an organization, initiative or team of people. However chaotic, quick or confusing this world gets, a strategy and plan are still necessary.”

Resistance

You might hear, “strategic planning doesn’t work because things are moving too fast.” Or, “we’ve operated just fine with no plan so why start now?” And finally, “you can’t plan 3-years out with the pace of societal change.”

No matter the reasons, a volunteer driven organization needs the buy-in, commitment and a check on its relevance. Without a plan how will alignment with finances, committees and staff be checked? A well-written plan will communicate value to members and stakeholders.

Executives avoid strategic planning for several reasons:

- **Tactical Thinking** - Planners don’t know the difference between strategy and tactics. On an altimeter, strategy is reaching 100,000 feet for a 3 to 5-year timeframe. Operations is at 10,000 feet, for the year ahead. Tactics are ground level day to day efforts. Some boards and committees think they’re strategic when they are doing operational or tactical work.
• **To-Do List** - The last plan resulted in a to-do list of tasks for staff to complete. It was not properly cascaded and assigned to the workforce of board, committees, staff and consultants.

• **Unwieldy** - The planning session was expensive, took too long, and included the wrong people. Part of the magic about running any great organization is getting the right people, in the right seats, going in the right direction.

• **Facilitator** - The facilitator spent too much time on rewriting the mission statement, leaving little time for identifying priorities and performance metrics.

**The Process**

Planning should occur about every three years. Organizations doing an *annual* retreat socialize the board to think only one-year at a time, wrongly waiting for directives from each incoming chief elected officer.

Identify and invite strategic thinkers, many directors think about the good old days or are tactical in nature.

The size for meaningful discussion is 10 to 16 people. A large group takes more time for everyone to be heard. After several hours the group grows weary, thinking more tactical than strategic.

Build the plan upon the principles of innovation, relevance, member needs, and resource alignment. Goals should reflect the SMART acronym: Specific, Measurable, Attainable, Results-oriented and Time-bound. Planning should not be about throwing ideas on the wall to see what sticks.

A facilitator keeps the process moving. Avoid getting stuck on a topic too long or being hi-jacked by a boisterous volunteer offering history and lots of “good ideas.” Prep the facilitator with in-depth knowledge.

**Success**

The Wisconsin Restaurant Association created a strategic plan in 2018. Twelve months later they used the plan to conduct an evaluation. It is a tool to affirm the goals and priorities are accurate, making adjustments as needed.

WRA’s president and CEO, Kristine Hillmer, CAE, said, “We wanted to circle back and check our progress since the retreat.” We created a graphic to keep the plan on the board table and to communicate value to members.

As a result of their planning retreat:
• WRA has prioritized efforts within each of the five pillars or goals. Progress is being made on some very big initiatives.

• The plan has been integrated into board meeting agendas. We carved out time at meetings to ensure we are accountable and advancing the plan.

• We used the process to purposely abandon programs after an evaluation and alignment of resources and member needs. “We killed off a number of old programs that were no longer of value.” The plan became the litmus test for assessing, improving or dropping programs.

• The plan’s guiding principles have been integrated. They frame how the board and staff act in making association decisions and they have established a culture of innovation and respect.

• The plan is shared with members and stakeholders to demonstrate the work and value of WRA.

Considerations

To prepare for strategic planning, a board, committee and staff should ask themselves:

1. What is important to us? What about internal and external influences? How does a strategic plan support organizational success?

2. How will planning fit into our ongoing efforts? Can we get stakeholders to agree to new priorities? What should be dropped?

3. Who do we include at the planning retreat? Will successive leaders be willing to work the plan?

Reflecting on the group of executives who said they had no need for planning, it was interesting. Later in the conference they agreed if they had a plan it would
guide work of volunteer leaders to maximize effectiveness.

Most concurred their goals organizational would include 1) delivering member value, 2) serving as the voice of business, 3) facilitating events and education, 4) improving public awareness, and 5) sustaining a strong organization. At that meeting they created a framework for their board retreats.

Few organizations are successful without the process and existence of a strategic plan.

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Note: Bob Harris, CAE, provides free governance tips and templates at www.nonprofitcenter.com. Matt Harrington is an author, executive director of a chamber of commerce, and founder of an organization that focuses on culture, leadership and people www.HarringtonBrands.com.