Surviving and Thriving in 2009 and beyond

FEATURES

On the Advocacy Playing Field, the Game Plan Counts
Mastering the Art of Chairman Relations
Keeping the Momentum After the Plan Is In Place
The Chamber's strategic planning retreat has been planned for several months. The purpose is to discuss and agree on a direction for the Chamber. The resulting plan will be used as a roadmap, guiding committees and the Board, informing the community of priorities, and affirming the work of the staff.

As the retreat comes to an end, participants say they're excited, but then rush back to their offices to catch up on work. The Chamber staff sighs with relief that the plan was completed, but becomes focused on the emails and activities they missed because of the retreat. The scenario is not unique, but it can doom the plan.

How do you ensure that the plan becomes an active, living document? And that the Chamber's activities are guided by the plan? By communicating to your stakeholders and creating a plan to measure and celebrate results.

**FIRST 30 DAYS ARE CRITICAL**

The first 30 days following the retreat, you'll focus on writing the plan and getting your Board's final "stamp of approval."

Thank your volunteers for giving their time and ideas to build the Chamber's new roadmap. Let them know exactly how their work will guide the Chamber—and how the plan will be implemented.

Transcribe the discussions and flipchart pages into a crisp, readable report—do not measure success by the length of the report! Brief is often better, and some of the best plans are only several pages. If necessary, put supplemental reports, such as surveys and discussion of strengths, weaknesses, opportunities and threats (SWOTs), into an appendix, or leave that information out entirely so as not to be a distraction.

Stamp the final report "Confidential Draft" and circulate it to the retreat participants within 10 days—while discussions are fresh on their mind. Give them one more chance to comment. Some key leaders may have missed the retreat, but may have valuable input to offer.

After final input is received and the final draft approved, suggest that the Board chairman seek a motion stating, "This is the official plan of the Chamber by which Board, committees and staff will be guided." This will deflect notions by an incoming chairman that he can ignore the plan for his own priorities.

In the newsletter, publish an article and photos of the planning team so members can congratulate them on a job well done. By promoting the names of the planning team, everyone works a bit harder to achieve the results they discussed at the retreat.

---

Well, that's a wrap on this year's strategic planning. Might as well put it with the other ones.
According to an ACCE study, 72 percent of chambers plan for 3 to 5 years. Only 7 percent plan longer than 5 years.

THE FIRST YEAR
Publish the plan

Share the goals of the Chamber with members, prospects and the community by publishing it as a brochure; a well-designed brochure will serve as a member recruitment tool. Creating a slide show for use at the annual membership meeting and other gatherings will also help promote the plan and help the community better understand what the Chamber does and does not do.

The Greater El Paso (TX) Chamber of Commerce uses a tri-fold brochure to keep the chamber’s mission and goals before members, media and the community. Richard E. Dayoub, president, created a brochure that incorporates the Chamber’s mission, values, goals and strategies, imposed over a photo of the city’s downtown highrises and foothills.

Brian Shafer, president and CEO at the Logansport-Cass County (IN) Chamber of Commerce, provides all volunteers with a tri-fold brochure describing the Chamber’s mission, vision, values, goals and strategies for 2008-2011. He also includes a summary of leadership roles and a photo of the Board.

Note: Be cautious about how much detail is published. The intimate details of the plan should remain with the plan. Stakeholders and other community members want to see only the broad strokes. For instance, they will be more interested in knowing the chamber is “enhancing its advocacy program at the city and county levels,” as opposed to details such as the date a lobbyist will be hired or the appointment of a vice chair for government affairs.

Create an action or business plan

The plan represents the Board’s broad goals and major strategies. It results in activities to be carried out by committees and staff.

To track the work, create an action or business plan grid covering a 12-month period. The format can be a landscape-oriented table or matrix, listing the Board’s goals in the left column, the strategies in the center column (including notes for action steps, delegation and deadlines), and an area to check off achievements on the right.

For example, if the strategic plan sets a goal of recruiting 300 members in the next three years, the business plan will break that down as 100 new members per year, assign it to a committee, engage staff, check the budget for resources and initiate a plan of action.

Update and take the action plan to every Board meeting to keep committees and directors aware of progress (or diversions).

Framing tools

The plan’s goals and mission statement should frame discussions at the Board table. When discussions seem to go astray, refer to the mission and goals and ask if everyone feels like the discussion advances the plan.

If the Board feels strongly about adding more work for the Chamber, with a solid strategic plan it will be fair to ask, “If we add a new goal, what goal do you want to remove from the plan since we have limited resources?”

Activities outside the mission statement might result in unrelated business income tax (UBIT) or loss of tax exemption. Use the mission to structure board discussions, and consider posting the mission statement in the conference room or at the bottom of every agenda.

Annual evaluation

Strategic plans typically cover three to five years. During the interim years, the Board and staff should evaluate progress. While a full-blown planning retreat may not be necessary, a careful review of progress and report to the Board is essential—at least annually.

The best practice of some organizations is for the executive officers and Chamber’s chief paid staff member to review progress every six months. This keeps the Board closely monitoring the plan. In turn, the executive officers can approach committees that might be off-track. And the CEO can ensure that staff and departments are on task.

Protect the plan

It is natural for a new Board or incoming chair to want to leave his legacy.

Use the strategic plan with successive chairs as they consider what their legacies will be. Help your chairman select from existing goals rather than having them start a new path that is not in the plan.

When a chairman proposes initiatives that seem outside the existing plan, discuss the mission and goals to see how his or her ideas can be incorporated in the plan. If the chair’s goals are strictly outside the plan, explain that, “This is the plan adopted by the Board, so you’ll want to bring your new initiative to the Board to see if they want to amend the plan or take resources away from a goal that has already been approved.”

Plan champion

Appoint a strategic plan champion to monitor and report on progress of the plan. The most likely candidate is the
chair-elect, ensuring he is fully aware of the plan as they prepare to take office.

Another value of a plan champion is to ensure the Board realizes it is their plan and not solely a responsibility of the paid chamber president to report on the plan.

Some chambers forego a plan champion in favor of goal champions. These would be Board members who offer to take charge of monitoring and report on each goal. Thus four goals in a strategic plan would result in four goal champions. Sometimes the position is assigned to the appropriate committee liaison or chair, depending on Board structure.

Performance measures

Nearly every chamber activity can be measured. For example, membership recruitment and retention are annual measurements. Diversity in the organization can be measured. Income streams and ratios are easily measured. Create “dashboards”—quick-glance visual indicators that show the measures you’re monitoring and the progress you’re making.

The leaders at the regional USTA (U.S. Tennis Association) New England selected key performance indicators (KPIs) tied closely to their strategic plan goals. The organization has set a quantita-

tive and qualitative standard for 15 areas, including Board performance, committees, player enrollments, public relations and image awareness, and community collaboration.

Influences on the outcome

The core competencies of a chamber may, and should, be similar from plan to plan. What might change are themes or influences.

For example, the Kentucky Chamber of Commerce focused inward in its 2005 planning. Because it had just employed a new president and CEO that year, many of the goals concerned the chamber’s positioning, resources and structure. But by its 2008 planning retreat, the organization had gained strength and was able to focus outwardly on advocacy, education, economic development, and global initiatives.

Complete rewrite

Anticipate reconvening the strategic planners as the current plan completes its cycle and value. Use the existing document as the basis for building the new one.

Allocate time and budget for the resources (retreat setting, facilitator, etc.) for a rewrite about every three years. As that retreat adjourns, follow the steps outlined above to be sure the plan is an effective roadmap for your Chamber.

YOUR PLAN PUTS YOU IN CONTROL

As America faces an uncertain economic path, the best thing we can do for our chambers and our communities is to take as much control as possible and attempt to steer our course through the turbulent times by developing a strong plan. The best way to do this is by drafting and implementing a strategic plan, remembering that what we do with the plan after we have crafted it is just as important—if not more so—than the actual plan itself. After all, as business executive Richard J. Winwood said, “If we do not choose to plan, then we choose to have others plan for us.”

Bob Harris, CAE, is sometimes called the “Martha Stewart” of nonprofit management for his willingness to share best practices and templates at his website: nonprofitcenter.com. He visits with up to 4,000 chambers and associates each year to facilitate planning, train staff in operations, and to develop boards. This is his 25th year working for Hyatt Hotels of Florida. He can be reached at bob@rchcae.com or (850) 570-6000.