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Three Phases of Assoc. Strategic Planning Before, During and After

U.S. association guru, Bob Harris CAE gives us the benefits of his views on strategic planning. Here is the first part ‘before’;

You’ve prepared for months to arrange the association’s strategic planning meeting. It’s your responsibility, and you think you’ve handled it quite well. You have been able to convince some very busy board members, and key community leaders, to come together for a full day to chart a course for the future of the association.

But then reality sets in. What if you get everyone to the retreat and it all backfires? You can just see it now. Some people are doodling on their calendars. A few have excused themselves to make a phone call, and never returned. Still others are drafting notes for their next meeting. Even your board chairman is wondering what this is all for.

To avoid this scenario and make your strategic planning process truly effective, you should consider following the basic stages of the planning process. They can be summed up in just three words —- before, during and after. The “Before” Phase will require 60 to 90 days. The “During” Phase may take one or two days. And the final phase, “After,” requires about 30 days.

The “Before” Phase: Answering the critical questions on conducting the meeting

A strategic plan (also known as a long-range plan) is a roadmap to guide the association. It offers a strong, concise message to various audiences that the organization is determined to fulfill an important mission. Without a plan, the staff wonders if it’s on track and often the board appears to wander from crisis to crisis. The first step in the process is to decide to initiate a strategic plan and then put the time and effort toward it to make it a success.

- Who should participate? A planning session with too many people bags down the process; too few people and you miss the diverse input. An ideal number at the table is about 20 persons; a manageable group, allowing everyone to have input. If your board is small, consider inviting other stakeholders, such as community leaders, key committee chairs, important members and senior staff. One of the traps of planning is to exclude staff and, thereby, exclude the valuable information they can offer.

- Where to do the planning? Interruptions such as phones are planning distractions. Find a relaxed setting away from familiar offices. Just the act of driving an hour away and being in a new environment is a catalyst for good planning.

- How long should it take? Most plans are conducted in a day or two. It is ideal to begin one day, take a relaxing break that night, and return to finish it the next morning. Three-day retreats ask a lot of busy leaders. More often, organizations are asking if planning can be done in a few hours. Discuss with the leadership how much time they have to contribute and if they prefer one, two or three days. The shorter the allotted planning time, the less attention will be given to action steps and accountability.

- Do we conduct surveys? Be sure to ask the members for their input. If you neglect this step you’ll be asked, “Why didn’t you ask the members for input?” Consider surveys of members and leadership to determine their priorities. An adaptation of the S.W.O.T. format (strengths, weaknesses, opportunities, and threats) creates an effective survey.

- What about a strategic planning committee? Many of the decisions and survey development can be managed by committee. They can also conduct focus groups for additional stakeholder feedback. Beware of the planning committee composed entirely of board chairs! The planning committee should represent a diverse section of the membership and leadership.

- Should we use a facilitator? It is unfair for an executive director to serve as facilitator. Their input is too valuable to be leading the process; and some biases may arise regarding why certain goals were selected, or eliminated, by staff. An outside facilitator gives staff an opportunity to participate. Fees charged by facilitator might range from free (colleagues helping colleagues) to $20,000 or more. It’s important to note, however, that there is no proven correlation between the price of planning and the quality of the plan.

- What about game-playing? Many (if not most) boards are uncomfortable with group hugs, game-playing and academic theories. They are anxious to focus on the real planning in the limited time they have available. The strong facilitator will avoid warming up the board by “playing games” and get right to the point.

How do we keep the plan alive? Many organizations put the plan in a notebook and slide it on the shelf to collect dust. Appoint a plan champion to monitor and report on its progress or setbacks. To make sure the plan is discussed at board meetings, include an agenda item, “Strategic Plan Update.” Always include the goals of the plan when you are talking about the organization and its mission. The plan goals should become the guideline for all the major decisions of the association. It should be obvious to the board, your members, the staff and the community that the association is moving forward—into the future.

For further information, visit Bob’s website at: www.nonprofitcenter.com.

Bob’s 2nd and 3rd parts to this article, ‘during & after’ follow in our next issues.
Three Phases of Strategic Planning

In our last issue we published the first part of three part feature on Strategic Planning for Associations written by US association guru, Bob Harris, CAE

Phase II: Conducting the Planning

The date of the planning retreat has arrived. Follow these steps for more effective process and outcomes.

• Room Set Up
Essentials include flip charts, masking tape and wide markers. The best set-up is an open U-shape table and seating. Everyone should be comfortable, able to see the flipchart, and feel equal in stature. (Bowls of chocolates ensure everyone has sugar and caffeine to last through an afternoon.)

• Participants
Planning should include the leadership, senior staff and strategic thinkers. A manageable number of participants is 20 to 25; more than that and it’s difficult to keep everyone engaged.

• Set the Tone
It is incumbent of the chairman of the board to set a positive tone by explaining the importance of the planning process and thanking everyone for giving their time and attention. Use name tentcards to acquaint guests and the facilitator with each person.

• Facilitation
There are options to have a volunteer or staff member lead the meeting, or to hire an experienced facilitator.

Advantages of using a professional include tact in keeping the agenda moving, he or she has no personal agenda, and they can prepare the final report.

• Terminology
Planning terminology is unique for every company and association. Thus, an understanding and agreement of terms is essential. At the onset, agree the meaning of goals, objectives, strategic director and core competencies, for example.

• Purpose Statement
Planning starts by reviewing an organization’s mission or statement of purpose. This is the time for affirming or tweaking the existing statement. Some organizations will use the time to also enhance vision and value statements.

• Realistic Number of Goals
The average number of goals in a strategic plan is four to seven. Fewer goals allow for better focus and allocation of resources. Too many goals may cause a staff mutiny and depletion of resources.

• Strategies
Within each goal category are strategies. After broad goals are set, determine what strategies and projects are needed to advance the goals. Decide up front how tactical you want to drill down. Some groups cover action steps while others leave the assignment of deadlines, delegation, etc. to the staff.

• Duration of a Plan
Today’s associations are planning for three to five years, down considerably from long term plans that considered 10 or 20 years out.

• Measurability
Some performance measures may be discussed at the meeting and should be noted in the plan. For example, how many new members will indicate success? What sales targets should be set? Who has volunteered to chair a task force?

• Format
It is not a strategic plan if it does result in a written document. While some plans may be lengthy reports, usually “shorter is better.” To hold the attention of volunteers, keep the plan details to 10 or fewer pages — supplemental information can be included in an appendix.

△ Bob Harris CAE

www.association-executive.co.uk

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Phase III - After the Planning Session

Planning doesn’t end when the meeting adjourns. Many plans begin falling in the first 30 days because no report was drafted, it was too long, nobody cared, or it simply got placed on a shelf to collect dust.

- **Report**
  When the retreat ends, transcribe the notes and flipchart pages into a clean, dynamic document. Within 30 days, circulate it to key stakeholders for final review and input.

- **Adoption**
  Adopt the plan officially by a motion made at the next meeting of the board of directors. This action discourages an incoming president from saying the plan has not importance to him or her.

- **Credit**
  Acknowledge the participants who made the plan a reality. Write an article about the retreat and include photos of the volunteers contributing their time.

- **Budget Impact**
  The plan will influence upcoming budgets, impacting income and expenses. Make adjustments to the budget that reflects the new goals and strategies.

- **Inform Stakeholders**
  Members, and community stakeholders, deserve to know of the organization’s new strategic direction. This can be done through news releases, annual meeting, website additions and brochures.

- **Goal Champions**
  To monitor the plan, consider appointing board members who serve as the champions for each goal, or asking the incoming president to be the strategic plan champion.

- **Updates**
  Annually the plan should be reviewed by the board to measure progress. The full strategic planning process should be undertaken about every three years.

  The information reflects best practices in strategic planning. The purpose is to provide a framework so that no steps are missed in the process and to improve the outcomes.

**Strategic Planning Terminology:**

- **Strategic Planning**
  A process to identify, discuss and set outcomes for the organization. Participation should be visionary in understanding and setting a realistic course to best position the organization. The timeframe may cover a year to 10 years, though two to three year plan duration is common.

- **Mission Statement**
  The mission statement is the foundation of the organization’s existence and operations. It identifies the organization, the members or audiences, and the services, in one to three precisely worded sentences; also serves a public relations need. Mission statements are frequently found in or adapted from the bylaws or articles of incorporation.

- **Vision Statement**
  A lofty statement that answers: “What and where do we want to be in the distant future?” A vision statement, consider that you have unlimited resources and thus can take the industry or profession in the best direction to meet their needs. For example, “XYZ organization will be the premier organization in the state to serve the needs of all professionals.”

- **Values**
  Core values are consistent with the mission. They inform audiences of the organization’s principles. It is better to adopt a value statement than to amend the mission, vision or bylaws.

- **Goals and Objectives**
  The terms are synonymous. Goals are the major thrusts for the organization. Planning process should result in three to seven goals. They should be SMART: Specific, Measurable, Attainable, Realistic, and Timed.

- **Strategies**
  Strategies fall under goals. While the goals indicate direction for the organization, the strategies more specifically identify directives for achieving the goals. From a PR perspective, the strategies will be judged as to what actions the organization will be undertaking to benefit the members.

- **Public Relations**
  The final process of strategic planning will include telling constituents, allies and others the results of the strategic plan. An important aspect of the strategic plan often neglected.

Bob Harris, CAE, offers free association management tips and templates at [www.nonprofitcenter.com](http://www.nonprofitcenter.com)

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