Sustaining the Strategic Plan

By Bob Harris, CAE

A strategic plan is an essential element for successful associations. The plan is like a roadmap — positioning the organization, guiding successive volunteer leaders, advising committees, influencing membership and impacting budgets.

The process of planning is invigorating. What happens after the planning retreat ends will influence your success or failure.

Many plans collect dust on a bookshelf. Some plans lose traction as the incoming president replaces long-term goals with his or her to-do list. Still other plans become 50-page essays, too long for busy volunteers to read or follow.

Use these seven ideas to ensure your strategic plan’s success:

1. Circulate a draft of the strategic plan to participants within 14 days of the retreat. Too often, the plan remains on the flipchart pages, taking months to transcribe, while volunteers lose interest. To maintain momentum, get the plan on paper, mark it as a "draft" and ask the leadership to review it one last time before it becomes official.

2. Adopt the plan as the official strategic plan. This avoids an incoming president from negating its value and creating a plan of his or her own. The elected president should work the plan, not create a personal agenda.

3. Give credit where credit is due. Promote the volunteers and planning retreat with an article and photo of the meeting.

4. Create a brochure to inform members and stakeholders about the organization’s strategic direction and exciting projects. The act of telling members about the plan further commits the leadership to its advancement.

5. Appoint a “plan champion,” a volunteer who monitors the plan’s progress. Ideally this will be the incoming president. Or appoint “goal champions”—directors to oversee and report on the strategic goals.

6. Break down the strategic plan into a business or action plan. Schedule a staff retreat to discuss the board’s goals. Use a table or matrix format to set performance indicators, time frames and accountability for working the plan in the short term.

7. Don’t let the adage, “out of sight, out of mind,” doom the plan. Include a strategic report on meeting agendas (similar to having a brief financial update at every meeting). Also, on a yearly basis, review the plan and make course corrections. Finally, budget the time and money to completely update the plan every three to five years.

These seven ideas are proven tips for increasing the success and sustainability of your strategic plan.

Bob Harris, CAE, offers free association/chamber management tips and tools at his website, www.nonprofitcenter.com. Contact him at bob@rchcae.com.