Strategic Planning Marathon
By Bob Harris, CAE

Every organization needs a strategic plan. Whether it is the parent (i.e. national organization) or the component (i.e. chapter within the organization), a plan guides the leadership and informs members of intentions. Ideally, component plans are in harmony with the goals of the parent --- even though they are likely separate corporations.

Challenge

A request was made to concurrently facilitate the strategic planning for nine southern California components of the American and California Dental Associations.

To advance a challenge such as this required agreement and preparation. First, the executive directors had to determine the value in bringing together all of their elected leaders, nearly 140 volunteers. Nine groups had to agree on a date and format, and get their boards to buy-in.

Second, the format was critical. The meeting covered two days, each day with a distinct purpose.

Day 1 - Education

The first day was scheduled for 7 hours of leadership education. The topics covered board roles and responsibilities, rules of order and membership issues. With each volunteer knowing they’d be working on a plan the next day, it gave them a chance to consider their association, collaborate with like-minded leaders and start crafting their plan on paper, or at least in their minds.

Several elements made the first day successful.

- Volunteers received a customized notebook of information about their own association.
• Volunteers received plenty of nutrition; food and coffee stations kept everyone alert and allowed for added networking.

• Volunteers were comfortably engaged in a classroom setup with quality audiovisual. Directors were asked to sit with their components.

• Sponsor helped to defray costs.

After the day of training, individual components held evening board meetings or went out to dinner. The hotel had to have enough space for classroom, meals and nine breakouts.

**Day 2 - Planning**

The second day started with one large group in the classroom. The first day’s highlights and expectations were reviewed.

Then the focus turned to the specifics of the planning process --- mission, vision, values, goals, strategies and tactics. It was important to explain all the elements of a strategic plan so they would be confident as they broke into groups.

As the facilitator, I prepared by studying each of the group’s existing strategic plans. Thus I was able to discuss some of the good and some of the wordy mission statements. And, the importance of aligning the core purpose with the parent organization’s mission.

A copy of the California Dental Association strategic plan and the terminology of planning were delivered to every room for reference.

I was given liberty to make comments on each plan --- pointing out best practices, and in a few cases offering ideas for improvement. I presented examples of other industry plans and contemporary formats and brochures.

Most of the dentists agreed that a plan did not have to be 15 to 30 pages long; shorter is better. And they understood if they got the mission and goals right at this meeting, they would only need to update and evaluate the plan every few years, while simply monitoring and reporting on progress on a regular basis.
Component Visits

The large session adjourned with the groups separating into their respective meeting rooms. My role was to visit each component to check on progress.

In every group a volunteer quickly assumed the role of facilitator at the flip chart while another kept track of notes. The boards were eager to have “the expert” stop by to comment on their progress (or help get them back on track).

The components were able to draft or update their plans in three to five hours (remember they already had existing plans to build on).

The successful elements of the planning day included:

- Each group had a quiet, comfortable meeting room set up in an open-U with an easel and flipchart.
- Board members eagerly facilitated the discussions based on what they had learned on the first day (importance of mission, definition of goals, need for realistic strategies, etc)
- Nutritious breaks to keep them energized.

What did the executive directors feel about the planning marathon? Was their fear in having board members from one component interface with another?

    Mike Koonce, executive director of the San Diego County Dental Society said, “Our board and committees now have a strategic plan that clearly maps our route for the next three years, and a leadership that knows what it will take to get us there.”

    “The results of our planning this leadership conference surpassed our expectations. The leaders gained valuable insight about their responsibilities and guidance in developing a strategic plan. Our volunteers left enthusiastic, energized and dedicated to their new plan,” said Laura Petersen, executive director of Orange County Dental Society.

    “The two day program was a wonderful experience and provided the volunteer dentists the opportunity to develop leadership skills and at the end of the time, we created a workable plan for the next couple of years. Since the plan now fits on one page with goals and strategies, it is much easier for the board to review,
understand and implement,” Sue Merrill, CAE, executive director, Los Angeles Dental Society.”

“We accomplished a lot and more than any of us thought we could,” said Lee Adishian, executive director of the San Gabriel Valley Dental Society.

Will the marathon be repeated annually? There probably won’t be a need to plan it annually.

The components all had a majority of directors present, so the knowledge will sustain through board transitions. And the resulting plans span three years. Therefore the only need is to monitor progress and update the plan in a couple of years.

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Note: Bob Harris, CAE, teaches association management and board responsibilities. His website offers tips and templates at [www.nonprofitcenter.com](http://www.nonprofitcenter.com). Email: [bob@rchcae.com](mailto:bob@rchcae.com).