

Ensuring the Success of this Strategic Plan

Recommendations from the Facilitator to "Keep the Plan Alive" and not gathering dust

“The point about planning [is] not to be right, but to be ready.” - Arlene Goldbard, “The Pitfalls of Planning”, NEA.org

The most common complaint about strategic planning, and planning in general, is that plan documents tend to "sit on the shelf and gather dust". Despite good efforts of the people involved, and a positive experience at the retreat where the document was developed, it is difficult to keep focused on plans for the future when you get back to the office. Discipline and structure can help leaders to overcome the challenges of everyday work (which has been called "the tyranny of the urgent") and keep the plan from gathering dust on the shelf. Following are this consultant's tips to bring discipline and structure to your implementation of the strategic plan.

Periodic check-in is crucial for shared accountability. There are no "strategic plan police" that will come and enforce your commitments to this plan; only the people who created the plan can ensure that it happens. There should be regular agenda items at board meetings and management team sessions for a strategic plan update (specifically the Calendar of Planned Accomplishments). Celebrate planned Accomplishments that are completed, discuss which are still pending, and decide if any might need to be reconsidered or dropped. Talk about how to remove barriers to success, and see what kind of help people need to complete a planned Accomplishment.

Keep the plan in front of you, literally. Post the Calendar of Planned Accomplishments in your offices and cubicles, in the staff break room, board meeting room, or other appropriate places. Keep the plan document handy, on your phone, laptop, and/or in written form. Include it in grant proposals, and post a summary on your website. Put the board's Calendar of Planned Accomplishments on the back of the written agenda, with quarterly updates. Celebrate the planned Accomplishments you complete in staff newsletters and updates to the board of directors, and have fun with it. Talk about your Strategic Plan with new and existing employees, and help them see how they can contribute to the plan's success -- and to the overall success of your organization.

Assign and empower the Plan Coordinators to help others succeed. Plan Coordinators ideally take responsibility to track the overall plan, especially updating the written Calendar of Planned Accomplishments. The board could also ask one of its members to take on this responsibility (often it is the board Chair or President, with help from the Executive Director). Coordinators can send emails a week or more ahead of board or staff meetings and annual update sessions, reminding people to review the plan, complete their assigned Accomplishments, prepare to report at the next meeting, and ask about whatever assistance they might require.

Update the written plan quarterly and annually. At a minimum, the Calendar of Planned Accomplishments should be updated in writing every Quarter. Annually, the full Strategic Plan should be reviewed and a new Calendar of Planned Accomplishments should be devised for both board and staff. Each Accomplishment should be identified as completed, dropped/reconsidered, or carried forward into the next year.

Adjust as needed. The plan is only as good as its implementation. Be willing to recognize when things are not working as planned, and change your planned Accomplishments if it becomes apparent that your original ideas weren't quite right, new information arises, or circumstances change.