

Turning Strategy into Action: 10 Practical Tips for Making Your Strategic Plan Work

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Tip #1: Get the Word Out!

A strategic plan is only good if people know about it. Use every opportunity you have to communicate the basic elements of the strategic plan to your membership. A few specific ways:

- On your website
- In publications and printed material
- In e-mails
- In leadership (Board and staff) communications to the membership
- In volunteer manuals
- In reports to Board and members
- In your Annual Reports

Tip #2: Use Measurable Objectives

One sure way to keep a strategic plan on the shelf gathering dust is to use objectives that can't be measured. While it is sometimes hard to determine a benchmark against which to measure success for every program or project in a strategic plan, it is important to establish some means of tracking progress and demonstrating that your activities are moving you closer to your strategic goals. Don't be afraid to experiment, and if your measurement approach doesn't work, try something else.

Tip #3: Give Everyone a Stake in Success

Every part of your organization should share in the responsibility for achieving the goals of your strategic plan. Once you have developed your goals and objectives, as part of each budget development process, ask your committees, task forces and staff to review the goals. What specific projects or tasks can they initiate to advance the goals of the plan? What existing programs or services can be enhanced to further advance the plan? What current programs or services are no longer appropriate, given the goals and objectives of the plan? I believe every program or service should be directly contributing to the goals and objectives of the association. If it is not, you should evaluate the appropriateness of contributing resources to an initiative that doesn't drive your association forward.

Tip #4: Be Realistic

Another sure-fire way to kill a strategic plan is to over promise. Strategic plans are intended to be guidance documents. When you are developing specific initiatives to achieve the plan's goals, don't try to do everything in the first year! Identify a core set of important initiatives that can reasonably be achieved in a year, and work hard to achieve them. The success of completing those projects will energize your members and staff to

tackle the next level of projects and help them to keep focused on the strategic plan. Early wins build momentum.

Tip #5: Link the Strategic Plan to the Budget

Put your money where your mouth (or your plan) is! Use program-based budgeting to link your strategic plan with your budget. Resource Allocation Plans can be used to define the amount of money and human resources that are devoted to specific projects. This provides a concrete means of demonstrating your commitment to achieving the strategic goals of the organization. It also shows your volunteer leaders tasked with helping to achieve the goals of the plan, that there are resources available to be successful. Resource Allocation Plans can also be very helpful in setting priorities and managing your budget. If circumstances throughout the year change, and new projects must be implemented or advanced, the Resource Allocation Plans allow you to cut specific programs or activities (and the costs associated with them) rather than simply making across the Board reductions in specific line items that could compromise the effectiveness of the programs in your plan for the year.

Tip #6 Assign Responsibility

Make sure every strategic initiative of the plan has someone assigned to take ownership of the project and ensure its success. These project leaders may be staff or volunteers (preferably both). Be sure to explain what their responsibilities are with respect to the initiative and provide them with the support and the tools to be successful (appropriate budgets, data and information, staff support, equipment, etc.)

Tip #7: Incorporate Strategic Plan into Every Board Agenda

Build your Board agendas around your strategic plan. Every Board meeting has traditional business items to deal with, but make sure each Board meeting has significant time devoted to the strategic issues you have identified as critical to your organization's success. Provide your Board with briefing material on the topic in advance, as well as thought questions for them to consider. Use time at your Board meetings to discuss the thought questions and develop strategies to address issues. Depending on the size of your Board, you may want to consider breakout sessions during which Board members discuss the issues and develop recommendations. Following your Board meetings, distribute an action item list, noting the specific decisions, actions, or tasks decided upon, who is responsible for getting them done, and when they are to be completed.

Tip #8: Track Progress

As a staff executive, you are in the critical role of ensuring that both the volunteer and staff sides are actively working to implement the strategic plan. Be sure to regularly track everyone's progress. Consider writing an Executive Director's report to your Executive Committee and staff to highlight the status of each strategic objective for the current fiscal year. The report should identify the goal, the specific project, who the responsible parties are, and what progress has been made since the last report. The

report is an excellent and easy way to monitor progress, alert the leadership to important issues that may impede progress, and motivate those who have not been taking action as they should. (A few months of “no progress since last report” next to someone’s name gets noticed!)

Tip #9: Link Performance (including YOURS) to Strategic Plan

Make sure that staff is fully versed on the plan and their relationship to it. They should be well aware of the specific tasks in the annual program and budget for which they are responsible. They should also be rewarded for their effectiveness in achieving those objectives. If performance reviews, bonuses, etc. are tied to achieving the plan, you’ll find a lot more staff attention paid to those priorities. And the same goes for you and your incentive plans. If your Board regularly considers bonuses for you, tie them to achieving the goals of the strategic plan. This, too, will help ensure your focus on the association’s strategic direction. And finally, if your Board conducts regular evaluations of itself, its performance should also be linked to advancing the strategic plan.

Tip #10: Be Flexible; Review and Update Regularly

Your strategic plan is a guidance document, not a straightjacket! While your core values and major goals are not likely to change, how you get there and the tools to measure your progress should. The internal and external environment that existed when your plan was adopted has likely changed somewhat. Be sure to include a regular Board review of your strategic plan at least every year to assess progress on the plan, how the world has changed since the last review, and what impacts those changes might have on the specific projects and programs you have in place to meet your plan’s goals. Consider holding a Board meeting exclusively for this purpose, so that Board members and staff have sufficient time to think through these issues and make adjustments as necessary.