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Execution after the Planning Retreat

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The association executive from a Middle Eastern country said, “The board adopted the strategic plan, now they look at me as if I am the one to achieve the results.”

The plaint is familiar around the globe. Whose responsibility is it to execute the plan?

Frequent Scenario

A planning retreat is scheduled about every three years. Holding a yearly retreat socializes the board to think only 12 months at a time. For greatest impact, a board should be setting goals for 3 to 5 years.

The plan is intended to be a roadmap for successive boards. It should deter incoming officers from changing priorities each year. A plan is not a wish list or staff to-do list.

A good plan communicates value to members and prospects. It empowers the committees and staff to advance the programs.

After the Retreat

Many plans go on a shelf to collect dust until a director asks, “Whatever happened to the plan we created?”

This article clarifies responsibilities for executing the plan after the retreat:

Role of the Facilitator – The plan should be documented as a concise report. Leaving it on flip chart pages to store in a closet is sudden death. Expect a draft to be available within two weeks while discussions are still fresh to make enhancements.

The facilitator should advise on next steps and be available to answer questions about implementation. It may be beneficial to have the same person facilitate a staff retreat.

Role of the Executive Director - The executive will want to meet with staff to advise them what priorities the board has set. Staff may have anxiety about the board setting new directions.

A program of work is developed after the retreat. It usually takes the form of a horizontal spreadsheet breaking down the board's goals into monthly or quarterly deadlines for committee and staff work. Some groups color code the program of work with green, amber, and red to track progress.

It will include accountability of individuals, timeline expectations, and interim performance metrics. For example, to increase membership by 5 percent, the membership committee will have to enroll seven members per quarter.

Transform the plan to communicate value to members. Design it to fit on a pop-up banner, poster, business card, brochure, PDF, doorknob hanger or room key at the conference.

Role of the Chief Elected Officer – Soon after the retreat ask the board to pass a motion to approve the new plan. Keep it on the board table to frame discussions.

Include it on meeting agendas for updates. Appoint a director to serve as the “strategic plan champion” to report on progress. Frequently ask, “How does this motion advance our strategic plan?”

Goals without financial resources are unlikely to succeed. Meet with the treasurer or finance committee to discuss the new plan's impact on budget. This may be the time to make use of reserves.

Integrate the plan into the board meeting agenda. Include the mission statement at the top or bottom of the agenda. Replace the time spent on listening to reports with a focus on strategic goals.

Bylaws authorize the board or chair to appoint committees. Analyze how existing committees fit within the new plan. This is the time to merge, eliminate or appoint committees to align with the goals. Convene the committee chairs to discuss how they have a critical role in advancing the mission and goals.

Promoting accountability is a responsibility of the board chair. Allocate time to review and tweak the plan each year.

If after the retreat the board looks at their executive director to advance the strategic plan, they may not fully understand the purpose and value of a plan.

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Note: Bob Harris, CAE, provides free governance tips and templates at www.nonprofitcenter.com.