

After the Strategic Planning Retreat

After the retreat a summary report is prepared. Follow these steps for implementation.

Immediately

- A. Circulate the draft report to directors for final input, while discussions are fresh on their minds.
- B. Share the plan with staff to enlighten them about discussions, reducing anxieties for those who could not attend the retreat.
- C. Seek a motion to officially approve the document at the next board meeting.
- D. Where no keep performance indicators (KPIs,) performance measures, deadlines or assignments were set at the retreat --- add them to ensure accountability and implementation.
- E. Promote the plan for stakeholder awareness through a news article, website and/or member brochure.
- F. If there are components or chapters, describe the plan and suggest it be used as a framework for their program of work.
- G. Appoint a plan-champion to monitor progress, and report at meetings; consider the president-elect for this role.

Within 3 Months

- A. Review the budget; the strategic plan may result in an increase or expenditure of funds.
- B. Align committees and task forces with goals to be sure there is volunteer talent responsible for advancing programs and activities.
- C. Staff should operationalize¹ the plan, taking “ownership” for goals within their areas of responsibility.
- D. Create a program of work or business plan for the next 12 months to list and track assignments, deadlines, interim performance, etc.
- E. Add a “strategic plan report” on the board agenda; always keep a copy on the board table.

At 12 Months

- A. Review the plan at the annual board orientation.
- B. Update the program of work with revised deadlines, metrics and assignments, yearly.

At 3 Years

- ☐ Internal and external environments have changed since the plan was developed. Schedule a board retreat to craft a new plan, built upon the prior goals², about every 3 to 5 years.

After the Strategic Planning Retreat - Agreement 10-14.docx
bob@rchcae.com www.nonprofitenter.com (OK to adapt or copy.)

¹ To execute; including keep performance measures, timelines, accountability and assignments.

² When a plan is done well, it is anticipated that the organization’s goals (core competences) will remain unchanged at the next planning retreat—it is the *strategies and tactics* that are likely to change at successive retreats.