

Implementing the Strategic Plan

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The planning retreat is an important activity for every organization. During the retreat enthusiasm builds for new programs and growth schemes.

After the retreat everyone returns to their daily priorities. The retreat is just a memory.

Consider these steps to deploy, and sustain progress on the new strategic plan.

- ☐ **DRAFT:** Circulate the final draft of the strategic plan to board and staff decision makers to check for accuracy.
- ☐ **ADOPTION:** Official adoption of the plan by a motion of the board at the next meeting; within 90 days.
- ☐ **AWARENESS:** Announce the plan's major goals by posting on website, press release, newsletter and presentation at an annual meeting (consider PowerPoint format and printed handouts – the most well-read and membered plan will fit on a business card.)
- ☐ **ACTION PLAN:** Translate the strategic plan into a business or action plan detailing the assignments to committees and staff; adding deadlines.
- ☐ **METRICS:** Identify performance measures so progress can be measured and success recognized.
- ☐ **RESOURCE ALLOCATION:** Adapt or revise the budget to reflect the recommended programs in the new plan.
- ☐ **CHAMPIONS:** Consider appointing a strategic plan champion, or goals' champions, to monitor and report on progress of the plan.
- ☐ **COMMITTEES:** Align committees and task forces with the goals to ensure volunteer workforce supports each goal. Merge or eliminate unnecessary committees.
- ☐ **CONSULTANTS:** Outsource work that needs to be delegated beyond staff or volunteer capabilities.
- ☐ **REPORTING:** Allocate time to report on progress (or delays) in the strategic plan.
Consider a color-coded system such as GREEN – underway;
AMBER – needs attention; RED – halted.
- ☐ **UPDATE:** Annually review the plan in-depth. In three years develop an updated plan.

ASSOCIATION
CHECKLISTS

The plan is a roadmap to guide leadership and staff. It should be integrated into all aspects of the organization.