

Strategic Plan Sherpa

The board held a retreat every few years. Directors described it as valuable and a way to meet other members. Though a plan strategic plan was developed, come Monday morning nobody gave the plan much thought. It went on the shelf with the other plans.

An organization relies on a strategic plan to set priorities, align resources and advance the mission statement. It is an important document drafted and approved by the leadership. It will guide successive boards, the committees and staff.

To avoid failure after the retreat, rely on a “plan champion” to keep it front and center.

It is not a document intended to steer the staff. Staff rely on their own program of work or annual business plan.

Budget Similarity

The concept of a budget is similar to a strategic plan. The board approves an annual budget and receives updates at meetings. The treasurer is responsible for reporting on progress and changes in the financial picture.

Similarly, the strategic plan belongs to the board. Directors should expect to review updates and progress reports.

Rather than asking staff to report on the plan, appoint a member of the board to serve as a plan champion. The chief elected officer periodically grants time to the plan champion. It should be an item included on the meeting agenda.

Sherpa



A plan champion is like a Sherpa, a Tibetan who serves as a porter on mountain-climbing expeditions. In governance, a person appointed to guide a special project.

Why the need for a Sherpa? Circumstances will arise where other priorities trump the strategic plan, it may be a political issue or crisis. It is easy to forget that a plan exists.

There are varied techniques for monitoring and reporting on the plan.

Plan Champion – A member of the board appointed to ensure that the strategic plan is included in all elements of the organization. He or she works with staff to give periodic updates. Often the best plan champion is the vice president or vice chair who will move into the chief elected position. Each year the role transitions to the board's number two position.

Goal Champions – Multiple goal champions may replace the need for a single champion. They are assigned to each of the plan's core competencies. Most plans have four to seven goals, thus that number of directors would serve as goal champions.

The Bakersfield Association of REALTORS® refers to them as "Oversight Officers." The role is defined as "watching over and responsible for the work being done by the committees associated with each goal."

"The positions serve as a resource to the board president, tracking committee performance, aligning work with the plan, managing resources and ensuring implementation to benefit members and the community," said Linda Jay, RCE, CEO of the association.

Committees

It is vital that committees be aligned with the strategic goals. Upon completion of the plan, analyze the volunteer workgroups.

There may be opportunities to merge committees, eliminate or appoint new task forces to advance the goals. A goal without a committee is often simply more work for the staff.

Program of Work

While the board focuses on the longer-range strategic plan, the staff may develop a closely aligned program of work. It focuses on the immediate year ahead.

Its format is often a horizontal table or spread sheet to track assignments, progress and deadlines. Sometimes it is called a business or action plan. It is task oriented whereas the board should be goal and mission oriented.

Without a Sherpa a strategic plan may fail.

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