

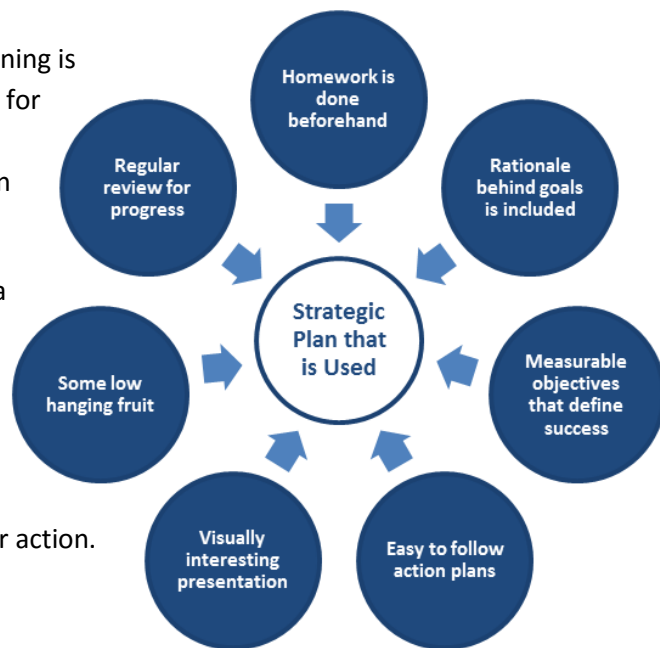
## The Strategic Plan: Not Just a Document on the Shelf

### *Making your strategic plan a tool that works for you*

-Esther Hammerschlag, M.A.

One of the biggest challenges in strategic planning is making your strategic plan into a working tool for your organization. How do you ensure your plan is actively used to guide your organization in achieving your goals?

First and foremost, and critical to developing a plan that will be used, is to build a strong foundation by putting work in on the front end – this will ensure your plan has buy-in from all partners, mutually understood goals, and clearly laid out action plans and rationale. This foundation will set the stage for action.



- **Do your homework.** Before you begin, conduct individual, face-to-face interviews with each board member. People generally speak more candidly in private. Partners may be afraid to address certain issues in the group, but be comfortable discussing them in private, helping you anticipate and proactively address potential challenges. You will gain clearer understanding of member needs, leading to a plan that is more likely to engage all partners as they see their own concerns included in the process. Ask about greatest successes, challenges, opportunities, areas for growth, and personal challenges to participation. Distribute a summary of what you learned to partners prior to your planning session to bring everyone to a shared starting point.
- **Ask obvious questions.** Too often, assumptions are made that we share the same definitions of concepts, inadvertently setting us up for failure. Partners may disengage if the plan doesn't address issues in ways they thought it would or should. Don't be afraid to ask, "What does that mean?" Many are surprised at the depth and richness of conversation in response to this question. For example, if your group wishes to increase behavioral health services, ask what "behavioral health" means. Continue asking questions until a mutually shared definition is reached. Especially important is to *define success*. How will you know you've achieved your goal? This way, everyone will share similar expectations of the strategic plan.
- **Include measures.** Make sure the plan includes practical and relevant measures of success, and how you will gather this information. Identify S.M.A.R.T. objectives (specific, measurable, achievable, relevant, and time-bound.) This will be crucial when it becomes time to revisit your

plan and update it. Make sure you include not just outcomes measures, but measures of the process to get there as well.

- **Include rationale.** The rationale behind goals and objectives is typically obvious at the time of strategic planning, yet often forgotten just a few months or even just weeks later. Partners become disengaged when they lose sight of *why* they are doing the work. Make sure to include the rationale behind goals in your written plan to remind people of why they are doing what they are, especially as you use and update your plan.
- **Include some low hanging fruit.** It's natural. We feel better and more motivated when we check things off the list. Include some easily attainable goals and objectives in your strategic plan. People will receive positive feedback and be more motivated to continue using the strategic plan as they see tasks accomplished.
- **Develop action plans.** The details of implementing a strategic plan can be overwhelming. Break it down. Create easy to follow action plans outlining necessary steps to reach your goals. These action plans will also become checklists of accomplishments and tools to assess progress towards goals – helping you identify necessary updates. Include activities, milestones, dates, and who's responsible for overseeing tasks.
- **It's all in the presentation.** How you present your plan is nearly as important as the plan itself - if it doesn't capture people's attention, they won't use it. Make the document colorful and engaging so partners read it, refer to it, and use it to continue guiding efforts. Make it simple enough so people outside your organization understand it, and add more detail further in for those that need it. Use interesting graphics and tables to present relationships of goals, objectives, rationale, and evaluation measures.

### **Using and Updating your Plan:**

If you've done the heavy lifting on the front end and built a solid foundation, using your plan and updating it becomes simple. Adjustments are perfectly ok to make - while you don't want to change your overall goals, adjusting *how* you get there is a normal part of the process.

- **Remember those action plans?** Quarterly, revisit your action plans and mark whether each activity is completed, in progress, or hasn't begun. Color coding is an easy way to show progress – green means complete, yellow means in progress, and red means not begun. Present this at your board meetings. If target dates aren't being met, facilitate discussion about why. Are goals too ambitious? Are additional resources needed that weren't anticipated? Are certain roadblocks preventing progress? Discuss possible intermediate steps or adjustments and create updated action plans to support achievement of overall goals.

- **Remember those measures?** As part of your strategic plan, you defined success and how you would measure it. Are you moving towards success? If not, why? What are you learning from your measures, and how can they help you improve your process or adjust your approach?
- **Do your homework...again.** Just as you interviewed partners prior to strategic planning, interview them again annually. Ask similar questions, including what has been most successful and challenging. This helps identify problems as well as successes that may not be readily visible. Interviewing partners also helps keep them engaged in the process of using and updating your strategic plan.
- **Annual reports.** Prepare annual reports that both summarize accomplishments and identify areas for increased focus. Include progress on action plans, results of evaluation measures and steps towards goals. Just like your original plan, make sure the presentation is easy to read and uses interesting charts and figures. Seeing progress in writing helps keep partners engaged.
- **Annual strategic planning updates.** Because strategic plans are typically intended for a period of several years, reconvene your members to update it annually. Use your annual interviews and annual reports as tools to inform this process. For each goal, review the rationale and original objectives, leading discussion about whether you need to stay the course, or make adjustments. Progress is rarely made in a straight line. It's the process itself that builds further collaboration and strengthens relationships. This process is dynamic as external conditions shift, or you experience changes to membership. While you shouldn't change overall goals, you should make changes to *how* you are going to reach these goals if the way you're doing it now isn't working.
- **Written updates.** Prepare annual updates to your original plan, utilizing all the foundational components of your original plan. Include any revised action plans, outcomes and evaluation measures. And remember; make it easy to read with interesting figures and charts.

**In summary, consider the following three overall principles in strategic planning:**

1. **Foundation.** Creating a strong foundation that takes into account the individual perspectives of all partners, includes rationale and clearly laid out definitions for success, and is presented in a way that is engaging and easy to read is the key to creating a strategic plan that gets used.
2. **Progress Reports.** Quarterly progress reports to your board based on action plans and evaluation measures will help keep them engaged in the process, as well as help you identify areas for updates.

3. **Annual Updates.** Annual strategic planning updates, utilizing the same principles as the original planning process, will ensure your plan gets used over time and remains relevant.