

Strategic Planning Process

Discussion Topics

- The Planning Process
- Trends and Challenges - SWOT
- Board Responsibility
- General Discussion
- Mission Statement, Vision and Values
- Setting *Goals*
- *Strategies* to Achieve the Goals
- *Action Steps*, Accountability, Integration and Alignment

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Whether you conduct your own strategic planning or hire a facilitator, a solid knowledge of the process and pitfalls is critical for staff.

Samples, templates and tables are provided for illustrative purposes and may be adapted as needed.

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Purposes of Planning

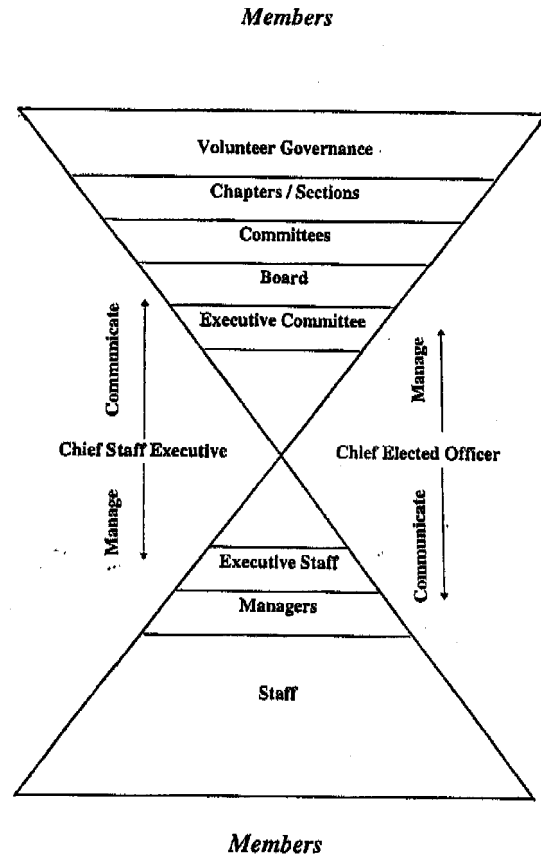
1. Review the achievements and direction of the organization.
2. An opportunity to examine operations (board, office, budget, etc.)
3. Discussion and buy-in by volunteers, leaders and staff.
4. Goal development to set the course for several years.
5. Allocation and determined best-use of limited resources.
6. Determination of members, constituents, stakeholder needs.
7. Development of association momentum.
8. Translation of the plan into a business plan or staff-committees action plan.
9. Public relations initiative resulting from the plan.
10. Integration and alignment with the committees and annual budget.



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Board Responsibilities

1. Determine the organization's **mission and purposes**.
2. Select the **chief paid executive** (*not the staff.*)
3. **Support the chief executive and assess performance** periodically – usually measured against the strategic plan.
4. Ensure **effective organizational planning**.
5. Ensure **adequate resources** (funds, time, volunteers, staff, technology, etc.)
6. **Manage resources** effectively.
7. Determine, monitor, and strengthen the organization's **programs and services**.
8. Promote the organization's **image**.
9. Ensure **legal and ethical integrity and maintain accountability**.
10. **Recruit and orient new board members and assess board performance**.



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(Adapted from Ten Basic Responsibilities of Nonprofit Boards www.BoardSource.org.)

Environmental Scan - Trend Watch

The purpose of an environmental scan is to examine events that affect the organization; both internal and external. It is sometimes referred to as a SWOT...a review of Strengths and Weaknesses (internal) and Opportunities and Threats (external.) The scan also looks at future predictions to see how they might influence the needs of the organization and its members.

Facing the Future

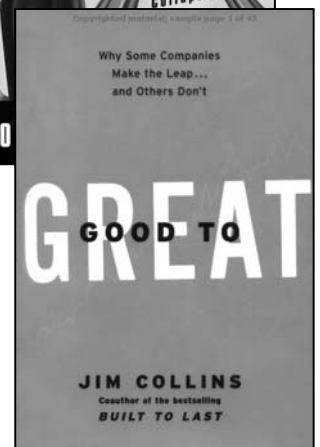
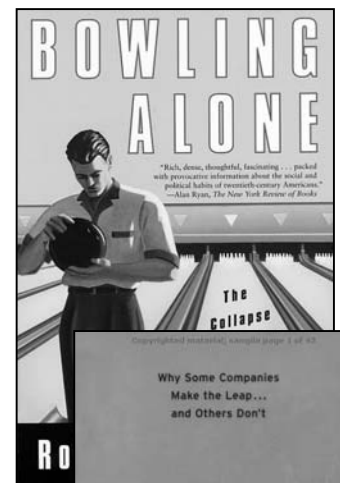
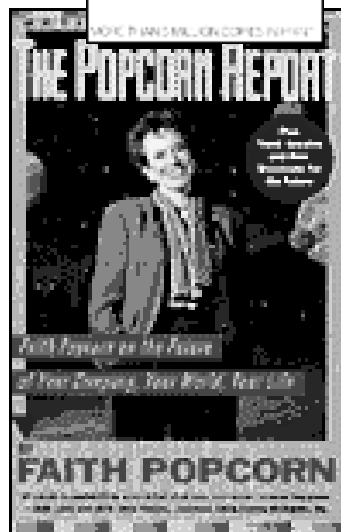
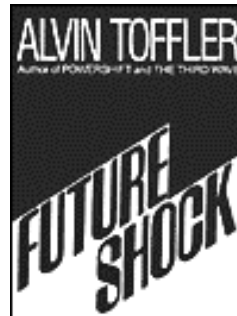
1. Leadership's Role
2. Value - Return on Investment
3. Responsiveness
4. Technology
5. Change Loops
6. Revenue Sources
7. Generational Issues
8. Workforce
9. Outsourcing
10. Governance Models
11. Competition
12. Mergers, Collaboration
13. Globalization
14. Image, Branding, Positioning

Exploring the Future

1. Meaning Matters
2. Transparency
3. Global + Local = Glocal
4. Inclusivity
5. Generational Synergy
6. Learning Culture
7. Living Organizations

Today's Concerns

- The Economy
- War – Terrorism
- Post 9/11 Funding – New Priorities-Security
- Volunteering – Leadership
- Privatization – Gov't. Funding



ASAE Trends Bulletins

S.W.O.T.

SWOT is a tool used in the strategic planning process. It stands for:

Strengths
Weaknesses
Opportunities
Threats

Organizations have found that the SWOT method encourages input and facilitates early discussions vital for planning. It is separated into two sections:

The Organization

The strengths and weaknesses of the organization *internally*. For example, there may be a shortage of staff or computers. A strength may be a good leadership team or established communications' system.

The Environment

The opportunities and threats focus on *external* factors. For example an opportunity may be a new law or new technology for the industry. A threat may be a proposed regulation or intense new competition.

Often the best use of the SWOT method is to distribute the brief survey to shareholders of the organization and especially those who will be participating in the strategic planning process. This gives everyone time to independently consider the organization and its external influences. Then, at the meeting the participants can discuss their findings and a group consensus of the primary SWOT factors can be identified.

By waiting until the planning meeting to undertake the SWOT process, you may have good discussions, but little time for *individual* thought. The advance notice of SWOT gets leaders and shareholders interested in the planning process.

Strengths, Weaknesses, Opportunities & Threats

Please give careful consideration to the influences and priorities of the organization.

- Strengths & Weaknesses refer to internal operations of association.
- Opportunities & Threats refer to external factors of association.

Your Name _____ Assoc. Position _____

List your concerns and issues relating to association.

Strengths (internal) (example: stable membership base, good leaders, solid and dues income).

1. _____

2. _____

Weaknesses (internal) (example: lack of tangible member benefits, committees, misunderstood mission).

1. _____

2. _____

List your concerns and issues outside of the association

Opportunities (external) (example: demographics, partnerships, privatization).

1. _____

2. _____

Threats (external) (example: gov't deregulation, salaries, privatization).

1. _____

2. _____

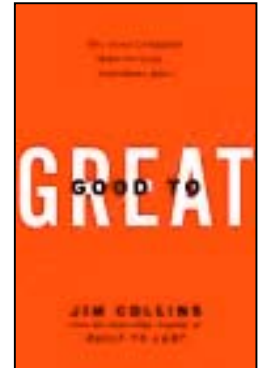
Priority - Please identify what you feel should be the association's highest priority in the next 12 – 24 months.

Please return to association staff by _____. *Thank you.*

Good to Great

“Good is the Enemy of Great”

Author: Jim Collins; Published 2001 – 300 pages.
Website: JimCollins.com



Application to Business and Non-Profit Organizations: Focus on (improve) your organization’s core purpose (mission, vision and values.) Set appropriate goals and BHAG. Remove egos and politics from leadership. Be sure the core of the organization is relevant to members/community served. Determine the organization’s economic engine.

Principles:

- What is the organization’s BHAG?
- Know what is Core and what is not? ...Great organizations preserve a cherished core ideology while simultaneously stimulating progress (and change to everything that is not part of the Core.)
- Successful organizations distinguish their timeless core values and core purpose (which should never change) from their operating practices (which should change constantly in response to a changing environment).
- The Hedgehog Concept¹: Those who built good-to-great organizations were, to one degree or another, hedgehogs. They used their hedgehog nature to drive consistently toward the core purpose. Those who led the comparison organizations in the book tended to be “foxes,” never gaining the clarifying advantage of a Hedgehog Concept, being instead scattered, diffused, and inconsistent.
- The Flywheel: Success starts slowly and increases with speed as core purposes and refined operations are implemented. (At first the flywheel is hard to turn, but as it gains momentum, it begins to spin faster and faster on its own power.) AKA: Sustainability of the organization.
- Level 5 leaders channel ego needs away from themselves and into the larger goal of building the organization. (*“You can accomplish anything in life, provided that you do not mind who gets the credit.” – Harry Truman*)
- Have the “right people on the bus.”

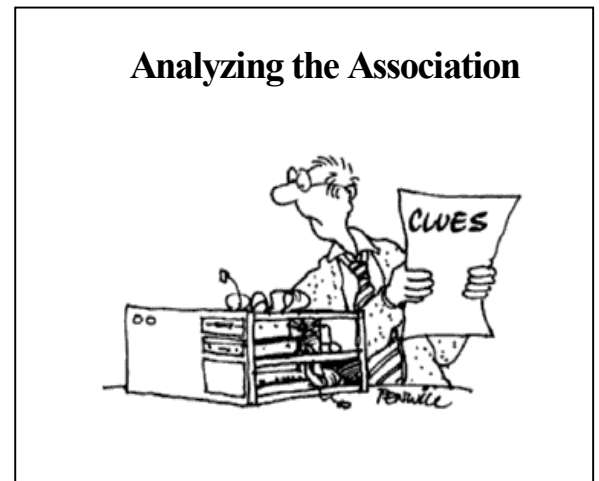
¹ n. An idea or concept that, if done extremely well and to the exclusion of almost everything else, can help a person's career or an organization to achieve its full potential.



**Includes your core values and purpose.*

“Reading” the Organization

1. Budget - Annual
 - Dues to Non-Dues Income Ratio
 - Largest Income Line Items – Can they be improved upon?
 - Reserve Balance or Reserve Goal
 - Audits
2. Organizational Structure
 - Subsidiaries
 - Complexity, Purposes
3. Committee Structure
 - Effectiveness, Standing, Task Forces (ad hoc)
4. Board of Directors
 - Board Size
 - Multiple Boards, Executive
 - Meeting Minutes
 - Agendas, Consent Agenda
 - Accountability, Governance Style
 - Leadership Development
5. Members to Prospect Ratio – Potential
 - Diversity, Community Outreach, Alliances
6. Technology, Website Usage and Communications
7. Benefits and Services Portfolio
 - ROI – Perceive Value of Benefits
 - Members’ Top 3 Challenges – Solved by Assoc?
 - Tangible vs. Intangibles
 - Golden Handcuff Benefit
 - Competitive Position – Different from Organizations
8. Member Input, Survey Frequency
9. Risk Management
 - Insurance
 - Apparent Risks
10. Workforce – Professional Development, Respect, Comparative Compensation



Planning Terminology

Understanding planning terminology is key at the onset so that all participants grasp the common words and phrases.

Strategic Planning - A process (not an event) to identify, discuss and set outcomes for the organization. Participants should be visionary in understanding and setting a realistic course to best position the organization. The timeframe may cover a year to 10 years, though two to three year plan duration is common.

Mission Statement – The mission statement is the foundation of the organization’s purpose. It identifies the organization, the constituency, and the services in one to three precisely worded sentences; also serving a PR purpose. Mission statements are frequently found in or adapted from the bylaws or articles of incorporation.

Vision Statement - A lofty statement that answers: "What do we want to be in the long-term future? In writing a vision statement, consider that you have unlimited resources and thus you can take the industry or profession in the best direction to meet their needs. For example, “XYZ organization will be the premier organization in the state to serve the needs of all professionals.”

Values - Core values are consistent with the mission. They let others know of the organization’s values. It is better to adopt value statements than to amend the mission, vision or bylaws.

Goals and Objectives – The terms are synonymous. Goals are the major thrusts for the organization. The

planning process should result in three to seven goals. They should be **SMART: Specific, Measurable, Attainable, Relevant, and Timely.**

Strategies – Strategies fall under goals. While the goals indicate direction for the organization, the strategies more specifically identify directives for achieving the goals. From a PR perspective, the strategies are judged as to what actions the organization will be undertaking to benefit members.

Action Steps – Action steps are specifics to achieve the strategies. Action steps take into account deadlines, quantifiable specifics, persons committed to doing the work, outsourcing, resources, etc.

Integration-Alignment – The organization’s budget and committees may need to be re-aligned with the goals of the strategic plan. Many organizations appoint only committees that support the goals, i.e. seven goals, seven committees.

Public Relations – The final process of strategic planning will include telling constituents, allies and others the results of the strategic plan. An important aspect of the strategic plan often neglected.

Plan Champion – A person appointed to be responsible to report on and keep the plan in the forefront of meetings agendas and budgets.

Pre-Planning Questions - Sample

The facilitator has asked that members of the leadership team and staff consider his or her top goals and challenges prior to planning.

Please respond directly to bob@rchcae.com. All input will be anonymous.

1. What do you think should be the top three priorities for organization to best serve our members?
2. Based on your interests and experience, what personal goals do you want to accomplish during your term of leadership?
3. What is number one opportunity and threat facing members that should be taken into consideration when setting goals and allocating our resources?

Questions of the Membership (by newsletter insert, fax or website²)

The Board of Directors will undertake strategic planning and prioritization of goals soon. We are asking for member input prior to planning.

1. What immediate challenges face your [firm, organization, you] to which you think our organization can be of help? (i.e. profitability, marketing, insurance, employees, networks, technology, etc.) Please describe the problem(s) and potential solution(s).
2. What are the greatest long-term (2 – 10 years) challenges and/or opportunities in your own organization? How can we provide effective help?
3. These benefits are popular with members; please rate your satisfaction with the benefit by checking the appropriate box. Add any comments on the back.

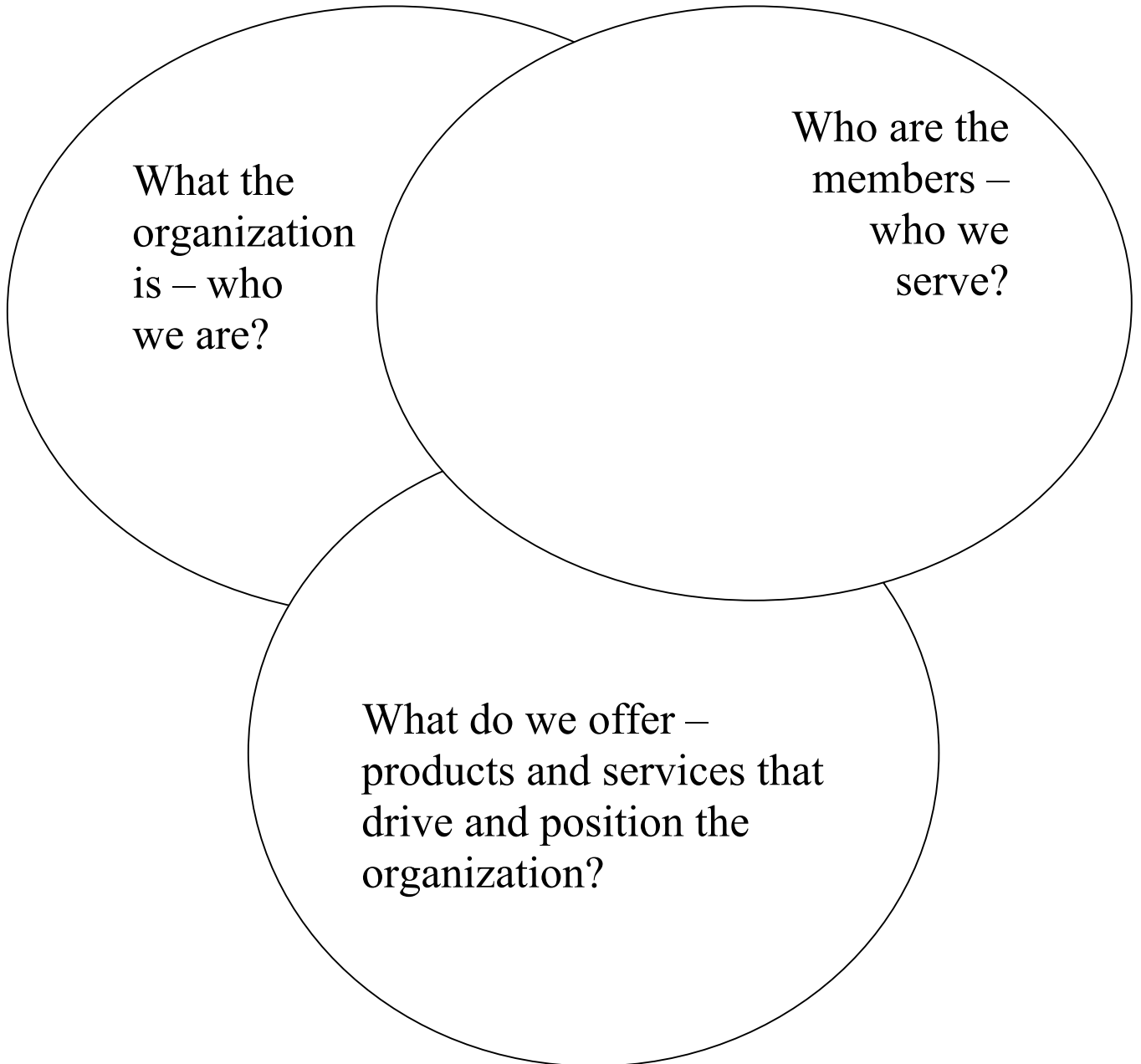
Benefit – Service	Satisfied	Mediocre Satisfaction	Dissatisfied	Not Applicable Unknown
Newsletter				
Staff Access-Resource				
Bid Reporting				
Conference				
Member Directory				
Labor Manual				
Website				
Etc				

Surveying - Board-Members 03-04.doc

² Zoomerang.com can facilitate low cost and free surveys on Websites.

Mission Statement

Concise – 1 to 3 sentences; has PR value: answers three questions.³



³ Does the mission statement differentiate the organization from others? Does it describe to an outsider or prospect the value of the organization? Do all programs, benefits and services fit within the mission statement?

Mission Statement

The mission is to provide services of the highest quality and value to its members to preserve and improve *skill, responsibility and integrity* in the industry. The assoc. recognizes that the membership - general contractors, specialty contractors and associates - is the most important asset of the organization. The highly satisfied chapter member is our most important goal.

Mission Statement - Samples

Vision Statement

The [ASSOCIATION] will be the organization of choice for those associated with the construction industry.

Value Statements – Cores Purposes - Beliefs

- To respect property rights.
- To work diligently with government agents.
- To conduct association business with the highest of standards.
- To nurture an environment of respect for volunteers and staff.
- To stay focused on the mission and strategic goals of the association.

WELCOME TO

AHHIF

ONLINE

Associated Home Health Industries of Florida, Inc.

OUR VISION To be the foremost resource and advocate for Florida's home care industry.

OUR MISSION As the voice for home care, our mission is to advance the interest and meet the needs of our members, enabling them to provide the highest quality and most cost-effective services throughout Florida.

Join AHHIF Today!

PRINNY I
February 2,

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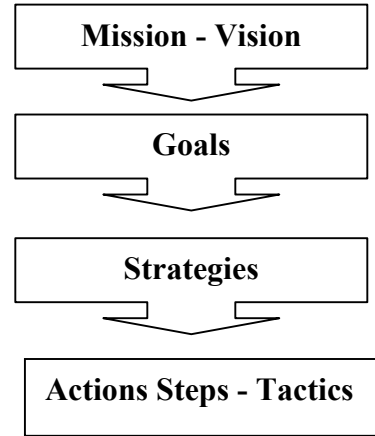
Set *S.M.A.R.T.* Goals

Goals are the momentum of the strategic plan. They connect the mission statement to the strategies and tactics to advance the organization.

The plan is the roadmap for the organization and the goals are the routes on the roadmap that lead to destinations and desired outcomes.

The S.M.A.R.T. acronym includes elements for goal setting. Goals should be **Specific**, **Measurable**, **Attainable**, **Relevant**, and **Timely**.

- **Specific** – Clear to the reader to understand the purpose and intent. Include key words and details in the goal statement. Most goal statements include a verb or action word.
- **Measurable** –Set quantifiable objectives; for instance, “A 20 percent growth in membership over three years.”
- **Attainable** – There is little use in lofty goals that will not be achieved. Is this goal realistic?
- **Relevant** – Does it meet the need of the members; does it support the mission and vision?
- **Timely** – Identify when the goal should be achieved? Will it be completed within the timeframe of the strategic plan or extend beyond?



Goal-Setting Process

1. Conduct surveys, do an environmental scan, discuss input and make judgements.
2. Brainstorm as to needs of the organization and its constituents, keeping “capacity” in mind. What efforts will best “position” the organization?
3. Offer goals and strategies for consideration. Don’t critique the input until everyone has had a chance to offer ideas.
4. Verify that each goal fits within the mission statement and has the elements of the SMART acronym.
5. Ascertain the level of interest and commitment by everyone at the planning table. Some goals may be “parked” for consideration in future plans.
6. Determine what strategies, and then tactics or action steps, will be necessary to achieve each goal.

Most Common Goals

- ✓ Education and Training/Professional Development/Body of Knowledge
- ✓ Organizational Effectiveness, Integrity, Responsiveness
- ✓ Membership Development and Services
- ✓ Government Relations, Advocacy, Lobbying
- ✓ Diversity, Inclusivity
- ✓ Economic Development, Tourism (Chambers)
- ✓ Communications and Technology, Website, PR, Marketing

FACERT+G (Acronym)

Fiscal
Advocacy
Communications
Education
Retention/Recruitment
Technology
+ Governance

Board Without a Plan



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Strategic Planning – *Filter Questions*

At the onset of strategic planning, be sure to consider five essential questions before drafting goals. The resulting discussions will be beneficial for leadership understanding and buy-in.



Considerations

- 1. Does it fit inside our mission?**

All activities and efforts should fit inside the mission statement to respect the founders and protect the organization's tax status. Is the mission statement distinct and contemporary? Be careful: treat it like the Constitution, opening it only rarely and wisely to refresh it. Many organizations add vision and value statements to clarify purpose.
- 2. Who is the primary customer?**

Often the association's secondary and tertiary members exhaust resources of the primary members for whom the organization was created. Be sure the primary members are on the minds of leadership. Don't let new market segments, an abundance of supplier members, etc. distract.
- 3. What is the economic impact?**

The question is a *reality-check* that should be asked often by the treasurer or finance committee. There are plenty of worthy projects an organization can undertake but resources are limited in the form of 1) staff, 2) committees, 3) volunteers and 4) funds. A plan without resources is simply an Illusion.
- 4. How well do we know the audiences?**

The strategic plan "positions" the organization. It is an indication to others about the strengths or weakness of the association. How will 1) members, 2) prospects, 3) government, 4) consumers, 5) allied organizations and the 6) media perceive your plan?
- 5. Does the organization offer real value?**

Some organizations live in the 60s by offering benefits described as a newsletter, social meetings and rental car discounts. They don't *add value* to the information they process. Ask the questions, Are we meeting the critical needs of members? Do we *add value* to what passes through our organization? Do members receive a return on investment (ROI)? Can benefits be honed and others dropped? What's our golden handcuff benefit?⁴

⁴ Golden Handcuff Benefit – A benefit so valuable that no member would drop out of the organization.

Implementing the Plan

Sometimes the plan collects dust on a shelf. Here are ways to use and maintain the vitality of the work you have completed.


- Mark the plan “**draft**” and circulate one last time for further input, understanding and correction (within 30 days after the planning retreat.
- Officially adopt the plan at the next meeting of the board (preferably within 30 days of the final report.)
- **Announce and promote the plan’s** goals by posting on website, press release, newsletter articles and presentation to constituents at an annual meeting (consider PowerPoint format.)
- Translate the strategic plan into a **business plan** for management staff to follow.
- Adapt or revise the **budget** to reflect the new strategic plan.
- Sunset unnecessary **committees**, align committees with the major goals and charge them with the strategies within the goals.
- **Outsource work** that needs to be delegated beyond the staff and or volunteer capabilities.
- Appoint a **plan champion** from leadership or staff to monitor and report progress on the plan periodically or at each board meeting. (Consider having a strategic plan-report on every board agenda.)
- Review the **progress** on the plan at an annual retreat of the leadership and staff. Update entire plan at least every 3 years.



Implementing the Plan.doc

Why Plans Fail

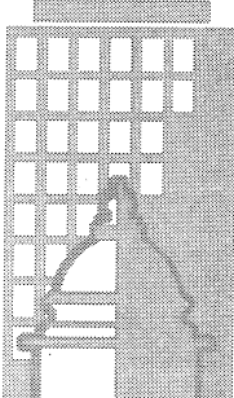
- Lack of member input, representation.
- Out of synch with trends and external influences.
- Lack of buy-in.
- Lack of resources. (\$, volunteers, staff, committees, time.)
- Too many goals.
- No measurable goals, deadlines, accountability.
- Little delegation.
- No action steps – breakdown.
- Sits on a shelf – ceremonial exercise in futility.
- Crisis management takes over.
- New administration sets goals - neglecting existing plan.



**2000-2002
STRATEGIC PLAN**

THE MISSION STATEMENT

“The Florida Association of Professional Employer Organizations is formed to protect, enhance, and promote the PEO industry doing business in the state of Florida.”



THE SIX GOALS FOR 2000-2002

Build membership to represent an overwhelming majority of the industry.

- Create a mentor program for members and new members, so that as a new member joins the association they have a contact person to guide them not only through the meetings, but to also help with on going questions.
- Add introductory membership category to remove the financial burden of the first year's membership dues.
- Develop office protocol for handling membership recruitment so the process runs smoothly for inquiries and for new licensee solicitations.
- Develop a plan to aggressively expand membership by targeting nonmembers who are headquartered within the state.
- Develop effective committee structure to bring members into the decision making process; educating them on the status of the industry and developing leaders for the future of the association.

Maintain a positive state legislative environment for the industry.

- Work with the Florida Legislature to maintain the viability and wellbeing of the industry.
- Work with The Florida Department of Insurance regarding their concerns that PEO sales persons are engaged in the unlicensed sale of insurance.

- Educate regulators throughout Florida on the laws regarding PEO services to reduce confusion for our members and their clients.

To provide effective, ongoing education for members of FAPEO and to support the NAPEO University programs.

- Expand Workers' Compensation Council to include other PEO topics such as human resources and health insurance
- Encourage PEO University courses within the state.

Create a communication system to inform FAPEO members about important state information and to educate the public about the industry.

- Develop continuing education course on PEO basics to be marketed to government regulators, attorneys, CPAs, and insurance agents to educate them on the PEO industry laws and practices (not to compete with, but complementary to, NAPEO).
- Continue FAPEO Flash notices and study the financial impact of publishing a quarterly newsletter.
- Create an Internet website to provide our members with a reference of current industry information and to educate the public on industry topics.
- Write and place articles in business journals and daily

Before, During and After Planning

Imagine preparing for months to arrange the strategic planning retreat. You've convinced busy leaders to come together to chart a course for the organization.

Now imagine you're at the retreat and within an hour you see the board chair glaring at you, you notice a few members doodling or writing in their calendars, and the executive officers are looking at you with angst.

You interpret their body language as "why are we playing games, when are we going to talk about the chamber," and, "do you know the value of my time?" You wonder if strategic planning was a mistake.

To avoid want to crawl under the table, consider these best-practices and pitfalls of planning in the three phases --- before, during and after.

Three Phases of Planning

A strategic plan (a.k.a. long-range plan) is a roadmap to guide the organization. It offers a message to various audiences that the chamber is determined to fulfill an important mission. Without a plan, the staff wonders if it is on track and the board wanders from crisis to crisis

Break down planning into three phases: *Before*, *During* and *After*. *Before* will require 60 to 90 days. *During* may take one or two days. *After* requires about 30 days.

“Before” concerns the determination to create a plan and answers critical questions leading up to the retreat.

Who should participate? A planning session with too many people bogs down the process; too few people and you miss the diverse input. An ideal number at the table is about 20 persons --- a manageable group, allowing input by everyone. If your board is small, consider inviting other stakeholders such as chapter representatives, key committee chairs, younger members and senior staff members. One of the traps of planning is to exclude the staff that can offer valuable information and can benefit from the discussions.

One of the traps of planning is to exclude the staff.

Where to do the planning? Interruptions such as phones are planning distractions. Find a relaxed setting away from familiar offices. Just the act of driving an hour away and being in a new environment is a catalyst for good planning.

How long should it take? Most plans are conducted in a day or two. It is ideal to begin one day, take a relaxing break that night, and return to finish it the next morning. Three-day retreats ask a lot of busy leaders. More often, organizations are asking if planning can be done in a few hours. Discuss with the leadership how much time they have

Organizations are asking if planning can be done in a few hours.

to contribute and if they prefer one, two or three days. The shorter the allotted planning time, the less attention to action steps and accountability.

Do we conduct surveys? Be sure to ask the members for their input. If you neglect this step you'll be asked, "Why didn't you ask the members for input?" Consider surveys of members and leadership to determine their priorities. An adaptation of the S.W.O.T. format (strengths, weaknesses, opportunities, and threats) creates an effective survey.

What about a strategic planning committee? Many of the decisions and survey development can be managed by committee. They can also conduct focus groups for additional stakeholder feedback. Beware of the planning committee composed entirely of board chairs! The planning committee should represent a diverse section of the membership and leadership.

Should we use a facilitator? It is unfair for an executive director to serve as facilitator. Their input is too valuable to be leading process; and some biases may arise as to why goals were selected or eliminated by staff. An outside facilitator gives staff an opportunity to participate. Fees charged by facilitator might range from free (colleagues helping colleagues) to \$20,000 or more. There may no proven correlation between the price of planning and the quality of the plan!

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How much brainstorming and game playing? Planning is often characterized by the activity of brainstorming. Before spending hours on brainstorming, make sure everyone understands the *capacity* of the organization. For instance, there is little value to brainstorming about hiring a team of in-house membership sales persons when the organization has no money and the office has no space for new staff. The facilitator should help the board understand the capacity of the organization (reserves, workforce, accountability, etc.) before encouraging creative ideas.

Many boards are uncomfortable with group hugs, game playing and learning about planning academic theories. They are eager to focus on planning in their limited time. The scenario of a facilitator warming up the board by "playing games" can be avoided or re-directed if fact is discussed up front.

“During” refers to activities and process at the actual retreat. The day of planning has arrived.

What about room set up? Essentials include flip charts, masking tape and wide markers. Room set up is most effective as a hollow square, open U-shape or crescent rounds. Everyone should be comfortable, able to see the flipchart, and feel equal in stature. Add extra seating for participants who want to stand up, stretch or move about the room. Bowls of chocolates ensure everyone has sugar and caffeine to last through the afternoon!

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Isn't planning terminology unique? Most volunteers have been involved in strategic planning in their firm or with another organization. Each process varies. Thus, an understanding of terminology is essential. For example, it's difficult to affirm a mission statement if participants don't know the difference in mission, vision and value statements. Explaining that goals are synonymous with objectives, and might be called priorities or aims, is important so that two hours into planning someone does not say, "I'm confused, are we discussing goals or objectives?"

How many goals are realistic? Sometimes the longer the planning retreat, the more work thrown into the plan. The average number of goals in an organization's plan is six or seven. Fewer goals allow for better focus and allocation of resources.

The average number of goals in an organization's plan is six or seven.

How long should the plan cover? A discussion with the board chair and participants will determine plan duration. In a changing economy and environment it is difficult to plan beyond three to five years. Less than three years is an action or business plan. Review the plan annually to assess progress.

How do we achieve the goals? The goals must fit within the mission statement. Within each goal will be strategies to advance the goals. Be sure the strategies don't assigned to first-year priorities --- the plan spans several years and work should be spread accordingly. Little is more disheartening to staff than to see a plan that dumps everything into the first year. If some good goals are suggested but just don't fit inside the duration of the plan, consider "Parking" them so that the next planning retreat can review recommended goals that were not included in the current plan.

If some good goals are suggested but just don't fit inside the duration of the plan, consider "Parking" them

What about action steps and accountability? Longer retreats allow more discussion of action steps. These are the identification of quantifiable measurements and the delegation of the work. Some boards like to tackle action steps while others feel it borders on micromanagement and can be best handled by staff. If the plan does not include action steps, deadlines, and committee assignments, then staff should draft an action or business plan for the year --- based on the strategic plan.

What's the final report look like? Planning can result in a 40 to 100-page document. Consider that the staff and leadership have to read and use the plan, so shorter may be better. There is minimal value in long reports that include every discussion, survey results, sample questionnaires, brainstorming dialogs, etc. --- they distract from the actual plan. To create the report you want, envision how leaders and staff will it. The mission, vision, values, goals, strategies and action steps can be formatted in 7 to 20 pages, making it easy to read and use. When hiring a facilitator, ask to see samples and discuss the final plan format that suits your needs.

If hiring a facilitator, ask to see samples and discuss the final plan format that suits your needs.

“**A**fter” the retreat, the next 30 days is critical for success of the plan.

Do we official adopt the plan? When the retreat is over, transcribe the notes and flipchart pages into a dynamic document. It has public relations value so keep it upbeat and celebrate the results and participants. Within 30 days, circulate it to participants and key stakeholders for review. Officially adopt the plan at the next meeting of the board.

Does the plan get publicized? At this point, 98 percent of the process is done. One last step is to market the new plan. Create an newsletter article, information for the website, a press release or brochure that describes the new goals. One way to make sure the plan gets accomplished is to tell others about the goals, programs and services they can anticipate from the organization.

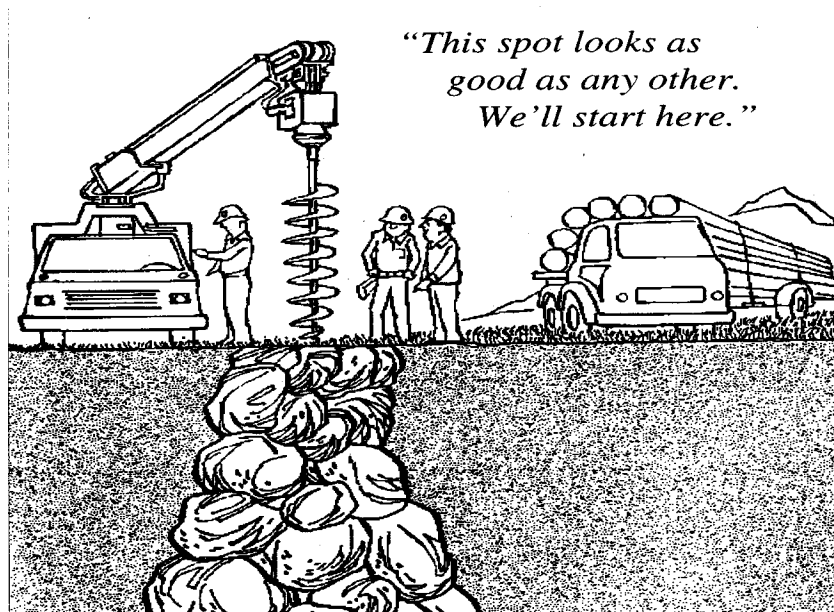
How do we keep the plan alive? Many organizations put the plan in a notebook and slide it on the shelf to collect dust. Appoint a plan champion who will monitor and report on progress or setbacks. To be sure the plan is discussed at board meetings include an agenda item, "Strategic Plan Update."

Appoint a plan champion who will monitor and report on progress or setbacks.

Does the plan affect the budget? The plan is not independent of other operations. It will have an impact on the budget, committees and marketing. Integrate the new goals and strategies into existing programs and operations.

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Bob Harris, CAE, focuses effective boards organizations. website offers management and templates at

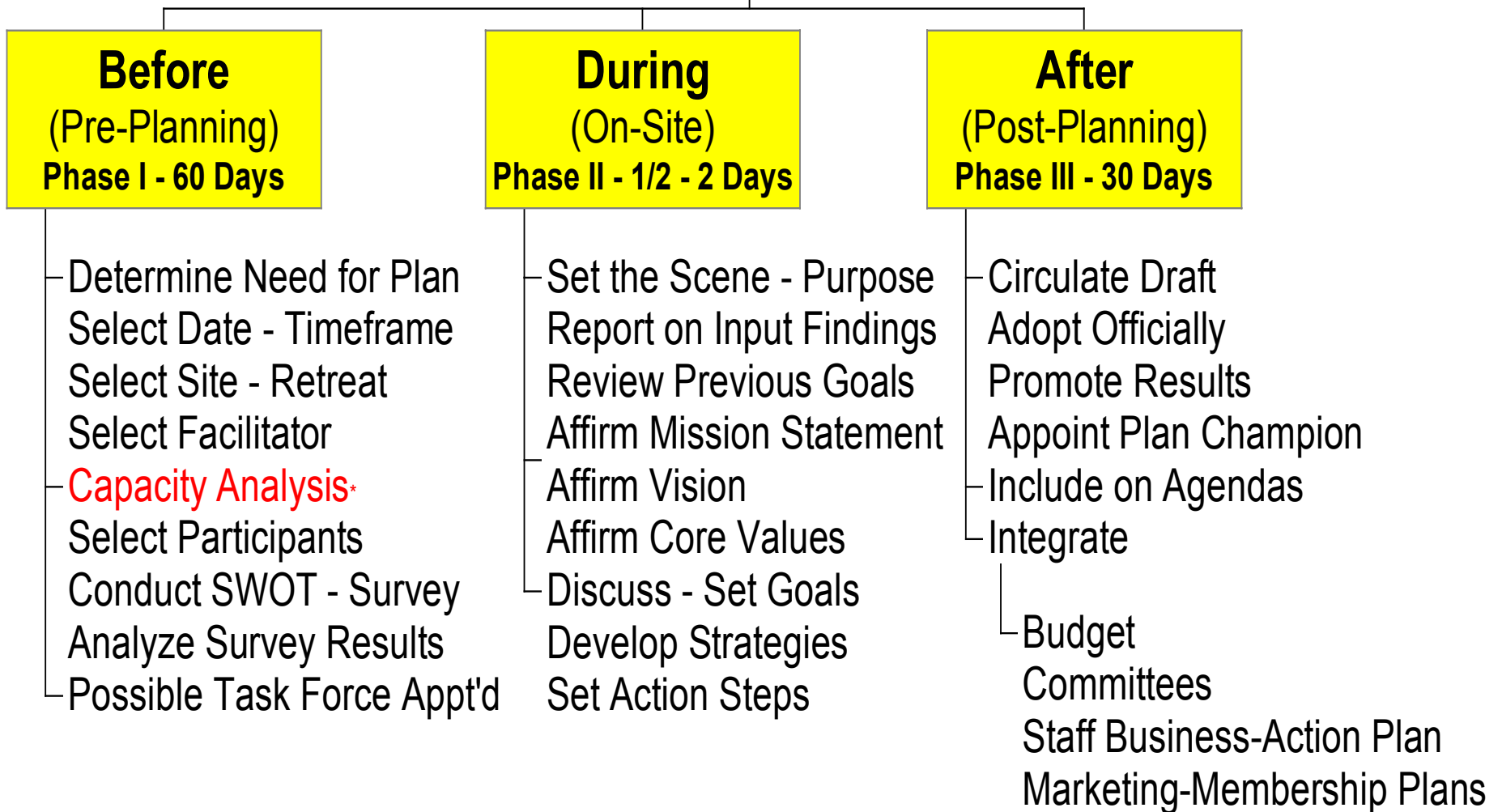


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Strategic Planning Process

(90 Days Start to Finish)

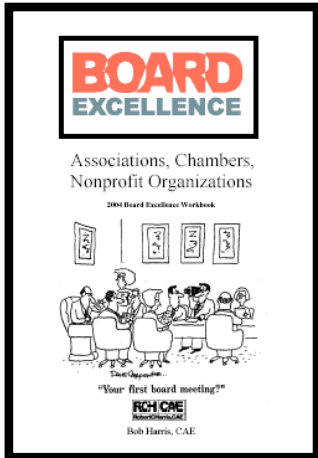


Planning Template

Major Goals	Strategies	Action Steps.	Accountability Deadlines, Who?
1.	1.1		
	1.2		
	1.3		
	1.4		
2.	2.1		
	2.2		
	2.3		
3.	3.1		
	3.2		
	3.3		

Major Goals	Strategies	Action Steps.	Accountability Deadlines, Who?
	3.4		
	3.5		
4.	4.1		
	4.2		
	4.3		
	4.4		
5.	5.1		
	5.2		
	5.3		

BOARD RESPONSIBILITIES

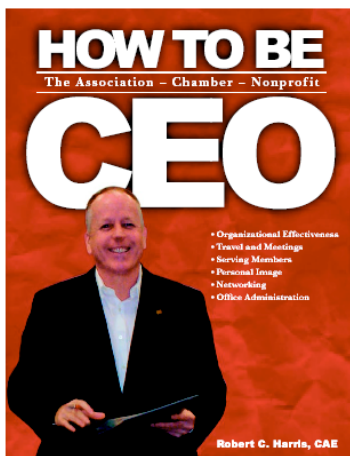
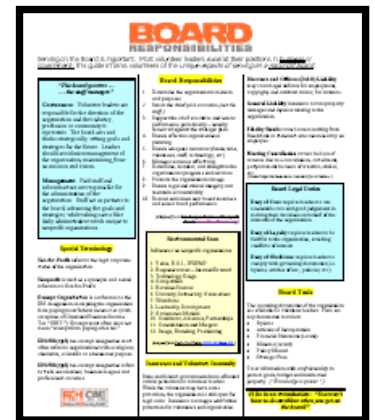


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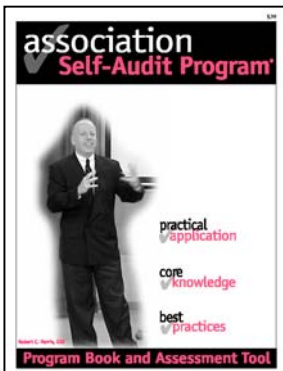
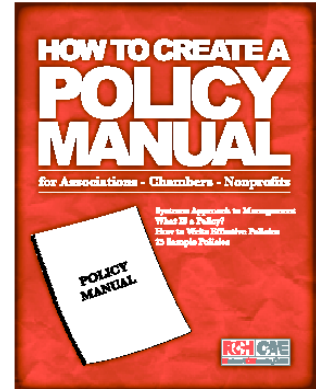


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About Bob Harris

There are 1.4 million nonprofit organizations in the US – including associations, chambers and foundations. Bob has studied thousands of them to develop best practices for more effective management.

His career started in Washington, DC, working with Presidential Classroom and then he moved to Tallahassee, Florida to build an association management company. He is author of **Building an Assoc. Mgmt. Company** and other books.

He teaches association management for Tallahassee Community College and is on the faculty for the US Chamber of Commerce.

He developed a framework for evaluating nonprofit organizations and conducts operating reviews for ASAE. The Association Self-Auditing Process® has been used by 5,000 organizations.

He has received the awards of lifetime achievement, executive of the year and supplier of the year from ASAE's allied societies. He has worked for Hyatt Hotels of Florida for 20+ years.

His systems have been called the Feng Shui of association management and he's been called both the Martha Stewart and Dr. Phil of association management.

His free website has hundreds of pages of management tips and templates.

Bob's career passions are demonstrated in two ideals:

- Promoting the impact of nonprofit organizations in America.
- Sharing the tools for helping and boards excel.