

## **Bringing Your Plan to Life**

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In the first two installments of this series, we covered the preparation and the planning stages of creating an effective strategic plan. Our process is designed to help you create a plan that will obtain understanding, acceptance, appreciation, and support of your nonprofit business among a broad cross-section of staff and board members, major prospects, and other key stakeholders within your constituency. When you involve the right people, the prognosis for success in implementing the plan is markedly improved. In fact, building ownership at this basic level is a significant step toward achieving the funding goals necessary for your organization to meet its mission. Our approach to planning can:

- Bring a fresh perspective to your proposed projects under consideration;
- Uncover and deal with faulty perceptions of your nonprofit;
- Cultivate board members and other major prospects who will be needed to fund principal elements of your plan;
- Develop committed volunteer leadership for fundraising as well as new candidates for board membership.

Even though you have followed the recommendations we have provided and conducted a productive strategic planning activity, implementing your strategic plan remains a challenge and must be approached in a proactive fashion. It is tempting, we know, for congratulations and good feelings to be passed all around and then go about business as usual. However, if the considerable effort you have expended in creating your strategic vision is to be purposeful and productive, there is no time to waste in institutionalizing the specific action steps to accomplish the plan's objectives. The strategic plan must be expressed through the priorities you establish in your annual operating budget and business plan and become the energy behind your day-today activities and staff work-plans.

Here are a few suggestions to keep your strategic plan off of the shelf and into the life of your organization:

- 1. The written expression of the strategic plan must be specific about the time frames for accomplishing each objective.**

Usually, strategic plans look forward for three years, but not all plans are terribly specific about setting priorities. Some goals or objectives may not be implemented until year two, even year three. Make certain your strategic plan has objectives to be realized in each of the following three years that address progression toward the greater initiative.

- 2. The board must be committed to take leadership in implementing the plan.**

It will be nearly impossible to accomplish the strategic objectives without the commitment and leadership of the board. Simply voting "aye" is not enough. The board should incorporate achieving the plan's objectives within its committee structure. We recommend:

- a. Assigning each objective in the plan to the appropriate board committee that will be responsible for its accomplishment. The committee should work with staff members to develop actions plans that adhere to the time frames in the strategic plan. This will foster engagement, and investment, of board members to support the vision and goals of the plan.
  - b. Assigning a staff member to work with each committee and its chair, if you have enough staff members. If not, the Executive Director and the board chair will need to provide frequent oversight.
  - c. Monitoring progress that will ensure that you stay on track, allow for adjustments along the way, and keep you motivated. A helpful organizational technique is to encourage the chair of the Board to set up an oversight committee of Board and staff members to monitor and guide the accomplishment of the plan.
  - d. Reporting from the board committees on their individual progress toward the assigned objectives being done on a quarterly basis. If your board meets more often, regular snapshots can be provided. Written reports should be distributed to give depth to the verbal reports.
- 4. Use the strategic plan as the basis for writing or updating your internal case statement.**

Every organization needs an internal case statement that serves as the marketing and fundraising resource for the development program. Having created a strategic vision and specific mission-driven direction for your nonprofit gives you a powerful story to tell to your constituencies. Further, it demonstrates that your organization and its leadership have thought seriously about your mission and what are required to reach your potential.

- 5. The organization's leadership must be willingly flexible as time passes and anticipated needs change.**

*"There are the things we know we know. We also know there are known unknowns . . . we know some things we do not know. But there are also unknown unknowns – the ones we don't know we don't know."*

The above quotation from former Secretary of Defense Donald Rumsfeld brings us face-to-face with the obvious. Even with seemingly short three-year plans, an organization may anticipate needs in the final year and a half of the strategic plan only to find that changes must be made to meet the current realities. Sometimes, future projections become absolute necessities; expected priorities cease to be important; previously unknown objectives must be immediately dealt with. This is as true in the lives of nonprofit businesses as it is for individuals.

Dealing with future unanticipated unknowns is another good reason to have established a board strategic plan oversight committee. This group will be monitoring both the progress being made by various board committees and being vigilant about the shifting environment and its consequences for your organization.

**Strategic planning done well is never ending. Think of it as a cycle.**

