

Your Living Strategic Plan



Report

Regular staff and committee reports to the board should reference relevant elements of the strategic plan. These updates help maintain a direct link between ongoing activities and the plan's goals.

At least once per year, staff should provide the board with a comprehensive, high-level report on progress toward all the strategic plan's goals. An annual board meeting or retreat is an excellent time to provide it. Create ample time in the agenda for the presentation, questions and answers, and discussion.

These reports will provide facts, figures, and stories that will be useful in fundraising and external communications. They will also be important reference documents as your group evaluates its progress over time.

Monitor progress and assess results

It may take many years to achieve your strategic goals fully. Evaluating progress over time is essential. It is usually more art than science.

Resist the urge to rely solely on precise metrics. Not everything important can be measured. Not everything that can be measured is important.

Consider developing a set of progress indicators that are a mix of metrics and other means of evaluation, such as narratives. Focus on indicators that will help you answer the most important questions you can think of relating to progress toward your long-term goals.

Err on the small side with the number of progress indicators you choose. Cumbersome systems for tracking progress can crash under their own weight.

Your progress indicators should prompt regular reflection, discussion, and critical thinking. Together, they should provide the basis for proper quantitative and qualitative evaluation at least once per year.

Update the plan

There are several good ways to keep your plan up-to-date. The first is simply to keep a running list of changes for your board to approve from time to time. Of course, you should not make such modifications lightly or impulsively. Updates are appropriate after a reasonable amount of information gathering, time, and discussion, and then with proper notice to the board before the meeting that the changes are reviewed and approved.

Another helpful way to keep your plan up-to-date is to keep a running list of suggested changes made over the course of the year and to consider them at a set meeting time each year. In picking the meeting, consider the mid-point of the fiscal year. Then, the next budget and annual plan can be aligned with the changes.

If you are on a three- or four-year planning cycle, these methods should work well for keeping your strategic plan current and useful.

Renew the cycle

As you approach the last year of your plan's term, begin preparing to renew the cycle.

A good first step is to conduct a thorough assessment of progress made under your current plan. This assessment can build on the annual evaluations you have already done.

Next, consider whether you expect to make minor or major changes in this cycle. If you have been making regular updates using the methods described above, you may not need to overhaul your plan. However, from time to time, perhaps every second or third planning cycle, consider whether the framework for your plan and its highest-level elements are due for a significant update or overhaul. If so, carve out time in the months ahead for a deeper dive.

When you are ready to begin, return to the steps outlined earlier in this guide and customize your next process. It should not look just like your last one. Organizations evolve. Planning needs change with them. Tailor each planning process to your group's characteristics and needs at that particular time.

Good strategic planning on a regular basis will pay big dividends for your organization. We hope the suggestions in this guide will help make your next process meaningful, productive, and enjoyable.