PUTTING YOUR PLAN TO WORK

- Immediate communications and fundraising
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The first few weeks after your plan is finalized provide a golden opportunity for communications and fundraising. Develop a solid plan to make the most of it.

Immediate communications and fundraising

First, decide whether it makes sense to share your plan with the general public on your website, or only with select audiences such as your strong supporters, close allies, and candidates for your staff or board. Next, decide whether to share the full plan or only a high-level summary of it.

Next, decide which individuals or groups you should visit personally or at least call to introduce the new plan. What are your goals for these conversations? What aspects of the plan do you want to highlight with them? Are there specific requests, such as financial support for a key element of the plan, that you should make? Whom should you involve from your team? What materials do you need?

Next, decide whether and how you should communicate more broadly. Should you mail something about it to your general membership? Should you develop a fundraising appeal around one or more key elements of your plan?

In any case, find the mix of communications and fundraising activities that makes sense for your organization now, and that will help build an understanding of and support for your work going forward.

Financial strategy

During your strategic planning process, you should have thought seriously about the financial implications of your new plan. It is important to now expand and refine your thinking into a multi-year financial strategy.

- Do you have adequate reserves of unrestricted funds? If not, how will you build them?
- Are you reasonably confident you will make your budget revenue targets this year?
- How does your budget need to change over the next few years to meet the goals in your strategic plan?
- Which types of revenue will you count on? Which revenue streams are most volatile? Most restricted? Least restricted?
- What are the implications for your financial strategy and management?
- What aspects of the new strategic plan are already fully funded? Which have inadequate funding at this point? Which have none yet?

What do your answers suggest about which activities you should move ahead with confidently and aggressively? Which should be limited or delayed pending adequate funding? What traditional programs or activities need to be scaled back or eliminated?

Discussion of many of these questions should have begun early in your planning process. Now is the time to answer them definitively, in a way that guides all who will be involved in implementing your strategic plan.

PLEASE REFER TO THE SUPPLEMENTAL RESOURCES PROVIDED IN THIS TOOLKIT FOR ON FINANCIAL AND BUSINESS PLANNING.

Fundraising strategy

Similarly, it is helpful if you have thought about fundraising during your planning process, whether or not a section specifically about fundraising was part of your board-adopted plan. Ideally, the leaders of your fundraising team were meaningfully involved from the start.

Now is the time for the fundraising team to expand and refine your fundraising strategy. It should be developed in tandem with your financial strategy. Both should guide the more detailed annual fundraising and budgeting plans you will develop over the course of the coming years.

- Do you have adequate, reliable streams of general support? Is your restricted support targeted to high-priority programs and activities?
- Which fundraising activities currently provide the most reliable results? Which have the highest return on investment of the fundraising team's time and effort?
- Which fundraising efforts have adequate staff support at this time? Which need more? Do you need to add fundraising capacity or reallocate some of the capacity you have?

These are perennial questions for a fundraising team. The start of your new strategic plan cycle is an excellent time to make sure to think about them all, and to develop a coherent fundraising strategy to support your strategic plan.

The new strategic plan provides fundraising opportunities. Think about questions such as:

- Which supporters do you approach for general support and which for support of specific programs or activities?
- Which of your existing supporters will be most interested in particular elements of your new strategic plan? Should some of them be approached for major increases in support for those elements? Should they be asked to make multi-year commitments?

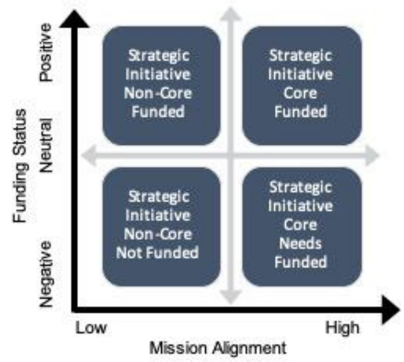
PLEASE REFER TO THE SUPPLEMENTAL RESOURCES PROVIDED IN THIS TOOLKIT ON FUNDRAISING PLANNING.

Program alignment

Aligning programs and related activities to the new strategic plan is an essential first step in implementation. It should begin right away, in parallel with the development of finance and fundraising strategies.

Programs tend to develop lives of their own over time. Aligning them to the goals, strategies, and priorities of the new strategic plan may require determined leadership.

- Which existing programs and activities are central to achieving your strategic goals? Which are not?
- Which programs are well funded? Which are not?
- Is significant new funding available to support new activities that are necessary to achieving your strategic goals? If not, will those activities be delayed pending funding? Or, can they be "paid for" by reallocating staff time and budget dollars from other programs?



It usually makes sense to do some reallocation. Start by scaling back or eliminating non-core programs and activities – especially those with inadequate funding.

Annual budget

Your annual budget is where the rubber meets the road. Aligning it with your strategic plan is the single most important step in implementation.

Budgets reflect priorities. They determine what gets done next. Your first annual budget after the adoption of your new strategic plan must reflect your new priorities. Otherwise, your strategic plan is a plan in name only.

Beware of inertia. Since programs tend to develop lives of their own, there is often pressure to continue staffing and funding each of them just as you have in the past. Resist it. This is your chance to begin turning the organization in the direction of your new plan's priorities.

It may take more than one budget cycle to complete the turn, especially if some programs or activities that are now lower priorities have dedicated funding (such as one or more restricted grants) for the year ahead. That is all the more reason to begin making those shifts that you can now.

Like the adoption of your strategic plan, the review and approval of your annual budget are part of your board's fundamental responsibilities. Staff should take the lead in drafting the budget and should work closely with the board's finance committee in presenting it to the full board. However, in the end, approval is the board's job.

The board will benefit from a high-level memo accompanying the proposed budget. It should come from the executive director, finance director, or board finance committee chair, and addressed to the full board. It should explain how the proposed budget aligns with the priorities of the strategic plan. It should also identify the major assumptions behind the proposed budget, and address considerations such as contingency plans if certain significant revenue events do not materialize as projected. Such a memo provides the context, information, and thinking that the board deserves to have as it prepares to make its most important annual decision.

The strategic plan and the annual budget are the board's two most powerful tools for guiding the long-term trajectory of the organization. Neither is a useful tool without the other.

Annual operating plan

A board-approved annual operating plan is a valuable companion for the annual budget. It can help the board understand what it is "buying" with its budget. It can also help staff members align their more detailed work plans with the strategic plan. ***TREC strongly encourages every group to develop and use an annual operating plan.***

Some executive directors fear that an annual operating plan invites micro-management from the board. However, a good one can actually help avoid it. Micro-management is most likely to occur when board members do not understand how ongoing work connects to the strategic plan. A solid annual operating plan that accompanies the budget fills the void, making the connection.

Sometimes executive directors feel that an annual operating plan is more work than it is worth. However, it is, in fact, some of the most high-value work staff can do, for the reasons stated above.

An annual operating plan for the board's reference need not – indeed, *should* not – be highly detailed. It certainly should not be at the level of individual work plans with very specific tasks, responsibilities, timelines, and other detailed information. The sweet spot for most groups will be a document of perhaps 4-10 pages that outlines top priorities for the year and makes the connection to both the strategic plan and the annual budget.

Together, the annual operating plan and budget are the most valuable elements of the "10,000-foot level" of the overall strategic framework described in Part 6 of this guide. They begin to bring the board-approved strategic plan to the ground. They also provide the basis for the staff's more detailed work at the "1,000-foot" level.

Job descriptions and work plans

The final crucial step in turning your strategic plan into action is to align staff job descriptions and work plans with your annual plan and budget. These should be job descriptions and work plans for each staff team or "department" (program, finance, development, communications, etc.), and each staff member.

Some job descriptions and work plans may require little or no modification. Some may require tweaks. Some may require significant changes.

Job descriptions and work plans are essential management tools. They should be reviewed and updated annually.

Job descriptions and work plans are decidedly *not* the purviews of board members, whose involvement as this level would indeed be micro-management. They are the responsibility of the executive director and other managers, in concert with the individuals they supervise.

Board members should understand and make sure that this level of planning and management takes place, but they should not be directly involved.

PLEASE REFER TO THE SUPPLEMENTAL RESOURCES PROVIDED IN THIS TOOLKIT FOR ON WORK PLANS AND JOB DESCRIPTIONS.