

How to keep your strategic plan alive.

Through a strong strategic planning process, you define success, clarify goals and objectives, and determine what strategies you'll implement to achieve them. You also assess how much all this will cost. The written plan then becomes a road map. It documents where you want your organization to go and how you'll get there.

After all this great work up front, though, you're not done! A strategic plan requires *ongoing* attention to be effective. With that in mind, here are a few tips to ensure the plan you've created serves its true purpose — and lives up to its full potential:

Use effective tracking mechanisms: As you're developing your goals and objectives, be sure to decide (and document!) how you'll measure progress toward them. (Are you proposing to increase school grades among the children you serve? If so, what's the baseline? How will you find out whether grades increased? How will you know whether your services caused the change?) If you can't find a way to measure a chosen objective, does your plan include strategies for creating new evaluation methods to do so? Or do you need to find a different indicator that will demonstrate your success *and* that you can realistically measure?

Report regularly: Don't wait until an annual (or even semi-annual) board retreat to review progress on your plan. At each board meeting, include a quick refresher on plan goals and progress. This can be part of the senior executive's report, for example. And to support consistent and efficient reporting, create a simple dashboard that shows progress toward key indicators at a glance. In addition to regular review by your full board, this dashboard can be a great tool to keep board committee and executive team meetings focused on the measures that count.

Build in accountability: It's important that everyone in your organization understand the plan and how their work fits into it. In your plan document, include information about which individuals, teams, and/or departments are responsible for the strategies you outline — and be sure to share the plan! Then, we recommend basing at least a part of every team member's performance review on relevant aspects of the plan. If, for example, one of your goals is to increase major giving, evaluation for relevant member/s of the development team will include a review of success toward that goal.

Regularly referring to and assessing your progress toward planned goals makes it much easier to make any needed mid-course adjustments, of course. It can also help you and your team remain motivated (and realistic), and smooth your organization's overall annual evaluation process.

To learn how Thurlow/Associates can help you develop a strategic plan — and ensure it stays alive — contact us for a no-cost consultation. You can reach us at (310) 675-6497 or at hello@thurlowassociates.com.