

Strategic Planning for Associations: Planning to Plan

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Making the commitment to undertake a strategic planning effort is an extremely important first step, but once you've done this, what can you do to ensure you get started on the right foot and continue on track? Here are some tips.

Break the Mold

Start by assembling the planning committee. Strive to create a team that has a good balance of board and non-board members, and seasoned as well as emerging leaders. Include creative people who aren't afraid to challenge the status quo. Even though the committee should represent the association makeup, don't get carried away — if the committee is too large it becomes sluggish and cumbersome. Twelve or fewer people usually works best.

The president-elect is a good choice to chair the committee since he or she will be responsible for much of the plan implementation and needs to feel ownership of it. Appoint a plan monitor to assist staff with gauging plan progress. The plan monitor should be a “rising star” whose involvement with the plan will help develop his or her leadership skills.

Plan to Plan

What you do before you sit around the planning table is just as critical as what you do after. At a minimum, the planning committee must review association by-laws, policies, structure, finances, membership growth, current activities, and past research. Consider doing a pre-session questionnaire of key stakeholders to gauge their impressions of the association's strengths, weaknesses, opportunities and threats. In addition to generating valuable information, the questionnaire gets participants thinking of major issues early on, and helps kick-start the planning session. Questionnaire results also help create a benchmark to compare how opinions change as the plan unfolds.

Get Help

Working with a professional, impartial facilitator is essential. In addition to bringing a fresh, outsiders' perspective to the process, the facilitator balances conflicting points of view and keeps the session moving. It's also a

good idea to have the facilitator monitor the plan's progress for the first 6-to-12 months after the plan is developed. The early phases of the implementation process is often when plans falter, and the facilitator can help build contingency plans to keep the plan on track.

Focus on Results

Don't get hung-up on the process or language of strategic planning. Does it really matter if what's on the flip chart is a goal or an objective? What does matter is that your achievements must be specific and measurable. Resist the temptation to craft lofty or esoteric mission statements or objectives — the plan must be understood to be implemented.

The written strategic plan should have two versions. Version one is the full plan complete with research materials and other documentation attached. This version also contains a complete list of who's responsible for what, when and at what cost. The second version is a brief summary for distribution to a wider audience who will not actually implement the plan.

Think “Process” not “Event”

Strategic planning is an ongoing, cyclical process, not an event. Getting together “to plan” for a day or two every year isn't strategic planning. Change is continuous, and so are the strategies that are developed to deal with it. A good strategic plan reflects and documents accomplishments and gives rise to new objectives that bring the association closer to achieving its overall vision. For the plan to be truly effective, objectives need to be integrated into every aspect of the association, including the annual budget, staff performance appraisals and committee charges.

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