

## Strategic Planning Essentials

One of your association board's most important responsibilities is to set your organization's future direction and priorities. You can choose different routes and adopt one of a number of planning methodologies to fit the culture and resources of your organization. But regardless of what route you choose, all transformational strategic planning processes should have these qualities:

- 1. A keen awareness of change and opportunity.** Don't just examine your organization's internal capabilities and issues. Scan your external environment and select strategic issues your organization can pursue to create positive outcomes for your members and stakeholders.
- 2. A shared vision that positions you for leadership.** Engage in a frank and inclusive dialogue about your organization's values, aspirations and willingness to learn and adapt. Test and update the relevance of your current identity, structure, and business model for the future you want to create.
- 3. Audacious goals that challenge you to do important work.** Don't just play it safe and set goals that can be achieved in time for the next annual report. Overreach on three or four issues or opportunities that are critical to your future and stretch up to your potential. Risk a little failure, try innovative or courageous ideas, and you just might accomplish surprising things.
- 4. Desired outcomes, not defined tasks.** Strategic boards work hard to be clear about desired outcomes rather than trying to prescribe how the work should get done. Trust the expertise and ingenuity of your staff and volunteers to use the resources they have to create innovative solutions and effective strategies to get the results you want.
- 5. A few signature initiatives that move in the new direction.** Generate excitement by telling your members and stakeholders what great new things the organization will do with their involvement. Set the stage for new programs, services, or projects that can attract their energy and enthusiasm for your new direction.
- 6. A sense of priorities and a commitment to action.** You really can't give equal attention to every goal, objective, or new initiative in a plan, so set priorities across your plan for the near term. Determine the first steps that can lead to early wins and greater organizational buy-in. Then keep your strategic plan at the center of your board work and accountability. Through your actions, show that your strategic plan is important and drives your ongoing decisions.
- 7. Multiple means to align and engage people.** Most associations and nonprofits have a legacy of governance structures, relationships, and practices that can pull the organization in competing directions. They can either be the means for succeeding or the source of resistance that pulls you off

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course. Your plan should recognize, align, and engage the work of your many parts in achieving your shared vision.

- 8. A discipline of accountability and adaptability.** Even if strategic planning occurs on a scheduled basis, strategic thinking and direction setting is continuous. You need meaningful metrics and feedback processes to monitor progress in every board meeting. When conditions change, you must adapt your plan to reflect your new reality. Sometimes all it takes is an alternative route to get to your desired outcome.

## Useful Definitions for Strategic Planning

### Mission/Purpose

A mission statement is a clear and concise statement of your purpose; why you exist. It is a brief statement that identifies the basic business the organization wants to be in. It should tell what, for whom, how and why. It should be known and understood by all members of the organization.

### Vision

A vision should compel, excite and enthuse as well as communicate an ideal future state. A vision statement can encompass what we want for our organization, the world, nation, or field we are in and what role we want to play in that. (Also see Signature i's visioning methodology).

### Core Values

Core values express how you promise to conduct yourself. When your beliefs are put into practice, they demonstrate how you do things and how you behave. Values express your organizational culture.

### Goals

Goals are what the organization wants to achieve. They define the organization's priorities and focus your work. They express your desired outcomes. They should be broad-based and challenging, clearly and directly supporting your vision and mission. They should challenge you for at least 3 to 5 years. A goal does not need to have concrete metrics attached to it, but it should be clearly defined so that everyone working on this goal will know when it has or has not been achieved.

### Objectives and Initiatives

**Objectives** are the specific actions that describe how each goal will be accomplished. They prescribe the organization's priority activities and expected outcomes within a specified timeframe. They are meant to be actionable and measurable. They have a 1-3 year timeframe.

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**Initiatives** are high impact projects and programs that accomplish one or more of the goals and signal deep commitment to achieving the vision. Because initiatives require extraordinary effort and investment, they should be few and significant.

### **Some Examples of Goals, Objectives and Initiatives from Association Strategic Plans**

**Advocacy/Leadership Goal:** NAGC is the leader in establishing that schools are the place where children with great promise are guaranteed the resources and variety of educational settings they need to achieve at the highest levels.

1. NAGC will work toward public funding for giftedness and high potential that better reflects the percentage of students within the student population needing these services.

**Knowledge and Expertise Goal:** NACAC is the recognized and trusted source of knowledge, education and training for the transition into postsecondary education.

1. Conduct research and develop content and training opportunities in the following priority areas:
  - a. College readiness addressing both academic and non-cognitive characteristics
  - b. Affordability/financial aid
  - c. Changing student population and the historically underrepresented and underserved  
International recruitment
  - d. Essential college admission information for consumers

**Patient Safety Goal:** Demonstrate and support effective infection prevention and control as a key component of patient safety.

1. Collaborate and align with key infection prevention and public health organizations, agencies and consumer groups to demonstrate and promote effective infection prevention programs across the care continuum.

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## Setting Metrics for Your Plan

We recommend establishing a small but meaningful set of high-level metrics to monitor your progress in executing the strategic plan. Some boards refer to this as their dashboard. We prefer trying to set these metrics at the goal level because they better reflect the cumulative impact of the plan's actions. In our experience staff executives are in the most knowledgeable position to recommend an effective set of metrics for ongoing accountability.

## Evaluating Your Strategic Plan

Once the board has adopted a new strategic plan, the board also needs to continue to evaluate the plan's effectiveness. Signature i recommends applying these measures of success:

1. Did the strategic plan lead to bold recommendations or decisions for the future? Even if it you fall short of achieving an audacious goal, you are likely to find you have achieved more than you would have pursuing a low risk, easily achieved goal.
2. Are you getting early and sustained success in executing your vision and plan? The plan has to be connected to your current capabilities and culture even as it pushes you to lead significant change. You have to be able to see how you will get from where you are today to where you want to be.
3. Did the new direction transform the organization? A good strategic plan stretches and renews an organization. It puts the focus on new priorities and initiatives and updating and improving the programs and services that will be sustained.
4. Does the organization monitor changing conditions and update the plan when needed? The greatest risk for failure is getting locked into a view of reality and a vision for the future that no longer makes sense.
5. Is the organization more effective in the ways that matter most to it?
  - a. Are your decisions increasing membership, market share or mind share?
  - b. Are you adding to the value your members, customers and clients want out of their relationship with you?
  - c. Have you increased your influence and power to shape public opinion, policy, standards and practices?
  - d. Do you see evidence of renewal, innovation and initiative in your people and services?

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