

# 90 days to a strategic plan: A checklist

Strategic planning is a process (not a one-time event) that is designed to identify and establish outcomes for an organization, according to Robert Harris, CAE, who heads Membership Services, Inc., an association management firm in Tallahassee, Fla. But nonprofits sometime develop strategic plans with a great deal of fanfare, only to put them on the bookshelf and never refer to them again.

At an ABA Bar Leadership Institute session on board orientation this March in Chicago, Harris led a group of bar association officers and executives through a one-hour crash course on how to get a strategic plan off the ground and running in 90 days or less. More important, he also stressed how to keep the strategic plan on everyone's mind, rather than in a file cabinet, as the organization conducts its day-to-day business.

His suggested checklist, divided by time, appears below.

## Planning for the planning meeting

At least 60 days before the actual meeting:

- **Determine the need for a plan.** Is it intended to update an existing strategy or guide the bar's leadership through anticipated changes? Why do the stakeholders want a plan, and does anyone have a hidden agenda that may affect the process?
- **Pick a date, time frame, and site.** Unless your organization has a successful track record with off-site retreats, plan for a one-day meeting at bar headquarters that starts promptly at 8 a.m. and ends about 3 p.m. Suggest that participants check their BlackBerries only during meeting breaks or, even better, turn them off.
- **Select the participants.** The most effective groups are between 18 and

## GET S.M.A.R.T.

And don't propose goals for your bar that look good on paper but do little else—for example, "improve the image of lawyers in the community."

Any goal-setting process, Harris recommends, should lead to goals that are **Specific, Measurable, Attainable, Relevant, and Timely.**

- **Specific**—Make the purpose clearly understandable. Include key words and details in the goal statement. Include a verb or action word.
- **Measurable**—Set quantifiable objectives, such as "a 20 percent growth in membership over three years."
- **Attainable**—Is the goal realistic?
- **Relevant**—Does the goal meet the needs of your members? Does it support the bar's mission and vision?
- **Timely**—When should the goal be achieved? Will it be completed within the time frame of the strategic plan or extend beyond?

"The plan is the organizational road map and the goals are the routes on the road map that lead to destinations and desired outcomes," says Harris. "Goals connect the mission statement to the strategies and tactics" to keep the organization moving forward.

## Six Steps to Developing Goals That Work

Strategic planners, even those who meet for one-day or less, should use the following tools:

1. Conduct surveys, do an environmental scan, discuss input, and make judgements.
2. Brainstorm as to needs of the organization and its members, keeping "capacity" in mind. What efforts will best "position" the organization?
3. Offer goals and strategies for consideration. Don't critique the input until everyone has had a chance to offer ideas.
4. Verify that each goal fits within the mission statement and has the elements of the SMART acronym.
5. Determine the level of interest and commitment by everyone at the planning table. Some goals may be tabled for consideration in future plans.
6. Spell out what strategies and action steps will be necessary to achieve each goal.

24 people. If the board has more members, pick those who are representative of the board as a whole (in terms of age, gender, years in practice, type of practice, and so forth). If the governing board is smaller than the recommended number, tap the membership at large.

- **Select the facilitator.** The facilitator should not be a staff person, board member, or any other stakeholder

who should be at the conference table rather than in front of a flip chart. Check with the ABA's Bar Services Division, your colleagues at other bar associations, local colleges and universities, and community organizations for their ideas and contacts.

- **Conduct a capacity analysis.** The facilitator must do his or her homework before the actual meeting by re-

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viewing, at a minimum, the organization's minutes, policy manual, income tax returns, and financial statements. A thorough knowledge of the bar's organizational resources is necessary so that the facilitator can assess its capacity to implement proposed goals and strategies.

- **Conduct a survey and tally results.**

The primary purpose of surveys, membership meetings, or focus groups during the strategic planning process is to assure the rank and file that the board is listening to their opinions—even if it eventually adopts some other approach.

### Meeting day

- **Set the stage (both literally and figuratively).**

Participants should be at a U-shaped table with a flip chart that is visible to everyone. To promote a sense that all stakeholders are equally important, do not place chairs along a side wall or in the back of the room. The president should open the meeting by thanking the participants in advance for their input and emphasizing the importance of the process to the bar association's continued growth.

- **Present a brief report** on the survey results and review the organization's previous goals and achievements.

- **Affirm the organization's mission statement.** The mission statement is the "foundation of the association's purpose," according to Harris, and is frequently found in or adapted from the bylaws or articles of incorporation. It identifies the organization, its constituency, and its services in 20 words or less.

- **Affirm the organization's vision.**

The vision statement should answer the question, "What do we want to be in the long-term future?" In drafting a vision statement, Harris suggested, "consider that you have unlimited resources to take the profession in the best direction to meet members' needs."

- **Affirm core values.** Core values are consistent with the organizational mission statement and vision and should let others know what is important to

the association. Adopting value statements is preferable to amending the bylaws, mission statement, or vision.

Spend no more than 60 to 90 minutes on the survey results, mission statement, vision, and core values, combined, to keep participants fresh for the discussion of goals and strategies.

- **Discuss and establish three to seven goals or objectives.**

Goals should be SMARTER, Harris says. In other words, they should be Specific, Measurable, Attainable, [See sidebar page \_\_.] Realistic, Timely, Effective, and Relevant. The most common goals for nonprofits address governmental affairs; education and training; communications, public relations, and marketing; leadership development, membership recruitment, retention, and services; community relations; and organizational effectiveness, finances, and staffing.

- **Develop strategies and action steps.**

Goals are intended to guide the organization's direction, and strategies identify how to get there. One example of a goal is "build an association headquarters by 2012." One strategy might be "Evaluate the bar's financial resources." An action step describes specific ways to implement the strategy, such as "Submit a fund-raising proposal for the board's consideration at its August meeting."

The participants may well be exhausted after they have established the organizational goals and strategies, said Harris, who suggested that existing committees and staff be asked to draft tactics and action steps.

### The party's over—right?

Not quite, Harris said, recommending that board members accomplish the following within 30 days of the planning meeting:

- **Circulate a draft of a written report**

to meeting participants and other stakeholders. The facilitator must complete a written report that summarizes the discussion of mission, vision, and

values; identifies the three to seven goals, and suggests strategies for each goal. A formal written report is essential, Harris stressed, adding that tear-off sheets from the flip chart are inadequate for this purpose.

- **Adopt the strategic plan officially at the association's next board meeting.**

- **Promote results.** Prepare an attractive brochure that outlines your mission, vision, values, goals, and strategies for mailing to your members, posting on your Web site, or both.

- **Appoint a plan champion.** The champion is responsible for reporting on and keeping the plan in the forefront of meetings, agendas, and budgets. A president-elect is an ideal choice, Harris noted.

- **Align your committee structure to correspond with the organization's goals.** Streamline your committee structure, Harris recommended, such as by appointing one committee for each goal. Other committees and task forces should be treated as subcommittees under the appropriate goal.

- **Integrate the goals into the organization's daily operations.** Agendas, minutes, financial reports, membership mailings, and staff activities can be organized in terms of the bar's goals and strategies. Scrutinize any volunteer or staff activity that does not further the organization's goals, and question whether it should continue.

Finally, how often should the organization go through the strategic planning process? Every three to five years, Harris advised, depending on changes within the environment (such as rapid increases in membership growth, changes in local legal practices, and so forth). In any case, the plan should always extend beyond the terms of the president and president-elect. If the plan coincides with the terms of office of the current officers, he said, it is a presidential initiative and not a strategic plan.

—By Wendy J. Smith