



## TOOL KIT #6

# STRATEGIC PLANNING

### FAQ – IMPLEMENTING THE STRATEGIC PLAN

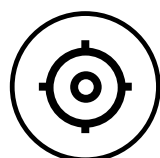
Your Board and staff have spent a good deal of time and energy to develop a Strategic Plan to guide your organization over the next several years. Congratulations! It's time to put that Plan to work, and to make sure it doesn't become just another binder on the shelf or item checked off your to-do list. The Strategic Plan can now go to work helping your staff and Board members make decisions, plan activities, and monitor progress.

#### 1. What is the first step in implementing the Strategic Plan?



The first step is making sure that the Plan is distributed, discussed, and owned by all who have a role in bringing it to life. This includes all Board members, and your staff. It can be shared with key stakeholders, such as your funders and the families you serve.

#### 2. How can we use the Strategic Plan in Board meetings?



Your Strategic Plan can help make sure your Board maintains focus on the future and progress toward your goals. This [Mission-Focused Board Agenda Template](#), developed by The Indiana Nonprofit Resource Network, is one example of how you can construct a Board meeting agenda that includes discussion of your progress on goals.

#### 3. How can we use the plan to improve our organization's performance?



While the Board does not evaluate staff performance directly, it is important to understand how the Strategic Plan can enhance the performance of the organization when it is communicated clearly, and when the work of teams and individuals aligns with the plan.

- When the Board evaluates the Executive Director, the Strategic Plan can provide clear criteria for determining whether the ED is on-track and where mid-course corrections may be needed.
- Similarly, when working with the staff, the ED and senior management team use the Strategic Plan to improve the management process and maximize the effectiveness of the members of individual teams. Managers help team members understand the individual roles they play and how their jobs contribute to success. The Strategic Plan can help all staff assess and prioritize efforts and be sure that work is focused on what is important.
- The "Activity Trap" is when we get so busy doing things that we forget to ask if what we're doing are the right things. The Strategic Plan can help avoid this trap.



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### 4. How can we use S.M.A.R.T. goals to put the Strategic Plan into action?

SMART goals can help the Board and staff assure that work is aligned with strategic priorities, and provide a basis for evaluating progress, staying on track, and assuring accountability.

SMART goals are:

- **Specific (and strategic):** Linked to position, team goals/mission, and strategic plan. Answers the question—Who? and What?
- **Measurable:** The success toward meeting the goal can be measured. Answers the question—How?
- **Attainable:** Goals are realistic and can be achieved in a specific amount of time and are reasonable.
- **Relevant (results oriented):** The goals are aligned with strategic objectives and focus in one defined area; include the expected result.
- **Time framed:** Goals have a clearly defined time frame including a target or deadline date.

Here are some examples of SMART Goals:

- *“The Education department will develop a new half-hour outreach presentation on school discipline, including a written trainer’s guide, by August 2018.”*
- *“The Board Fundraising Committee will develop a system of tiered giving circles for major donors, and create a written brochure describing the giving circles by December 2018.”*
- *“The volunteer coordinator will recruit and train 20 new volunteer advocates by conducting outreach at a minimum of five community events and offering two mentor trainings in April and September of 2018.”*  
(From Keeping Your Objectives “SMART”, Washington Nonprofits, 2016)

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