Twelve Strategies for Success

**Strategy #1: The Right People**
Include future leaders in the process. Create a culture of investment in the future that is about “we” not about “I.” Incorporate the plan into the nominating process.

**Strategy #2: Time**
Understand that strategic planning is not an event. It is a process that requires an ongoing commitment of time, energy, and resources. Organizational evolution is deliberate and occurs over time.

**Strategy #3: Shared Vision of Success**
The strategic planning process should include a vision and steps towards successful implementation. These are the practical considerations surrounding governance, finances, leadership, staffing, and operations.

**Strategy #4: Timelines**
Operationalize the plan by creating timelines for the board and timelines on the staff operational plan. Create action plans as necessary.

**Strategy #5: Measurements**
When possible incorporate benchmarks of success into the plan. “We will do X by Y and Z will be different because of it.” Benchmarks are not just numbers they should be connected to an outcome that keeps something the same or changes it a significant way.

**Strategy #6: Discipline**
Avoid the temptation to chase bright shiny objects. Plans are sustainable when they focus on transformation not quick fixes.

**Strategy #7: Accountability**
Build in accountability for the board and the staff. When delegating be specific about expectations and create feedback loops for consistent monitoring and reporting.

**Strategy #8: Flexibility**
Understand that circumstances change and the unexpected can occur. Adjust your plan as warranted and feel free to move something to the backburner.
Strategy #9: Tracking
Make your plan a living document by updating it periodically. In the update connect activity to outcomes. Accomplishment begets accomplishment.

Strategy #10: Commitment
Go beyond the core planning group and garner their commitment to the vision and opportunities presented in the strategic plan. This includes future leaders, committee members, and non-senior staff.

Strategy #11: Communication
Take the opportunity to share the plan widely not only with internal stakeholders but external stakeholders as well. Create opportunities to update members on your progress.

Strategy #12: Reflection & Renewal
Update, update, update. Reflect on your plan at board meetings, annual orientation for section and committee chairs, and annual board retreat.

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Checklist for Strategic Planning

✓ We know why we are engaging in strategic planning
✓ We are committed to the process
✓ We are willing to go outside of our own experience
✓ We are willing to devote the time and energy to the process
✓ We are engaged with possibility, the “what if”
✓ We are willing to set standards for success
✓ We are willing to make choices and set priorities
✓ We are ready to align our resources with our priorities
✓ We are accountable and will hold others accountable
✓ We are willing to say “no”
✓ We are flexible
✓ We are able to communicate about our strategic vision
✓ We are able to make the governance changes that will support our vision
✓ We are willing to align financial adjustments necessary to further our vision
✓ We are willing to evaluate and celebrate our success
✓ We are committed to being strategic and visionary as a continuing process