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One Year Later

Assessing the results of your strategic plan

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The strategic planning process can be one of the most exciting times for any nonprofit. New vision statements are created and the entire organization might feel a sense of new energy and excitement about the future direction of the organization.

Leadership and staff are mobilized to achieve all of the key goals and actions identified in the report. The board has a great sense of relief that all major strategic issues have been addressed and a plan of action has been developed for implementation. Everyone seems to have enjoyed their involvement in the process, and they are motivated to become more engaged to move the mission forward.

However, after a few months of high energy the results and successes that everyone hoped for are not always achieved. The excitement often diminishes and everyday organizational life and the day-to-day challenges are front and center. Despite the deep commitment to your mission and the determination to succeed, many organizations' managers fail to achieve the goals identified in the strategic plan. Estimates indicate that nearly 60 percent of nonprofits' management and staff have difficulty executing the strategies previously agreed upon. Significant investments in time and resources have gone into developing the strategic plan. However, far too often the report ends up sitting on some executive's shelf collecting dust.

Developing the most creative and vision-

ary strategic plan is useless unless it is fully executed and becomes reality. The reasons for poor execution are many, but some of the major reasons are:

- Resistance to managing change;
- Poor implementation training of those responsible for execution;
- Self-interest versus organizational interest;
- Maintaining existing functioning silos and political in-fighting;
- The lack of clear communication and not fully monitoring progress; and,
- Disconnect between planning objectives and operational realities.

You can ensure a high rate of return on the investment you made in developing your strategic plan by conducting a comprehensive strategic plan implementation assessment. Here are five questions to ask:

- What goals have been achieved to date?
- What obstacles might exist preventing further goal achievement?
- Where has performance expectation lagged behind?
- What needs to happen to move you forward?
- Who is resisting change?

It is ideal to have such an assessment performed after the first year anniversary of your plan's completion. This will give you ample time to demonstrate movement towards achievement of your vision and strategic goals. Either your strategic planning consultant or another "fresh pair of eyes" can be engaged to perform the assessment.

We have all heard the expression "talk is cheap and actions speak louder than words." Well, the same could be said about

the progress of your strategic plan implementation. A comprehensive strategic plan implementation assessment should review the demonstrated progress towards all strategic goals identified in the plan, including the following:

- Measurable results towards vision achievement;
- Documented records of financial improvements;
- More donors and philanthropic dollars;
- Expanded and enhanced programs and services;
- Indication of any development of any strategic affiliations and collaborations;
- Clearly visible results of higher performing leadership teams;
- Improvement in building your brand identity;
- Evidence of a more engaged and motivated board; and,
- Improved board governance and committee structure.

The key steps in the assessment process are: Review all relevant information, e.g., board minutes, financial statements, annual reports, etc. that can show documented improvements for each goal identified in the strategic plan; Schedule confidential face-to-face interviews with key board members and senior management to obtain their feedback of what's been achieved and why other goals have not been met; Summarize key findings from a review of the information above and confidential interviews for all of the above plan components; Discuss with the chief executive officer and/or board chair the results of your findings and make

recommendations for achieving desired strategic goals. Include in your report what achievements you noted and what specific changes need to be implemented either in personal or operational systems; Offer to conduct educational workshops for board, management and staff for developing their knowledge of best practices; Present the comprehensive strategic plan assessment report to the entire senior management team and board; offer to provide leadership

performance coaching to either the CEO, senior management or board chair if necessary to achieve the desired goals; and, provide inspiration, encouragement and the necessary tools to move forward.

Conducting a comprehensive strategic plan implementation assessment can be one of the best investments for any nonprofit board to make. Identifying obstacles or resistance to change and providing a specific plan of action to overcome is a requirement

for today's leadership. Rewarding and recognizing those employees or departments that have successfully executed the strategies in the plan helps create a culture of success.

Transitioning your organization from a culture of planning to one for managing results and outcomes is both challenging and rewarding. When the modifications to your strategic plan are implemented, your organization will regain the energy, motivation and commitment to achieve the vision. **E**

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