

# Evaluating Your Association's Strategic Planning and Implementation Processes: Meaningful Management Tool or Smoke and Mirrors?

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## **Introduction**

This article is intended to challenge association executives and members to think critically about the effectiveness of their strategic planning processes. To what extent does strategic planning process help set meaningful priorities to guide strategies and tactics? How effective is your association in ensuring that the results of planning processes actually get implemented through the development and execution of focused operational work plans? Strategic planning is essential to effective management. Programs undertaken in the absence of an ongoing planning process that involves environmental scanning, objective setting, strategy development and performance measurements offer no reference point for assessing how effectively resources are being allocated within an association. What we are offering is a simple checklist that we hope will help you and your colleagues to reflect on the effectiveness and merits of the way you conduct strategic planning and achieve implementation in your own associations. The checklist is based upon our own planning benchmarking research involving over 100 not-for-profit associations. By using this checklist as the basis for developing your own strategic planning Report Card, you will be in a position to assess the degree to which strategic planning serves as a meaningful management tool within your association. In addition, you may find the checklist a useful starting point for redesigning how you and your colleagues go about strategic planning.

## **Strategic Planning and Implementation: Key Tasks**

Our work with numerous organizations points to a number of attributes which define effective strategic planning and implementation processes. These are divided into two areas:

### **Strategic Planning Process**

- An established strategic planning cycle linked to fiscal year-end and budgeting.
- A professionally run planning process. Environmental scanning and background information (opinion surveys) to serve as strategic inputs to the planning process.
- Involvement in the planning process of functional/operational unit heads.

### **Implementation Process**

- An operational planning process that translates the strategic plan into operational work plan(s).
- An employee work plan development process that clearly references goals set out in the strategic plan and ensures day to day implementation of operational plans.
- An ongoing process whereby the Board receives updates on the organization's progress in meeting strategic goals.
- An employee compensation process whereby employees are evaluated and rewarded based upon achieving operational objectives in support of the strategic plan.

- An ongoing program evaluation process whereby the impact of key strategies, tactics, and programs are rigorously assessed against defined objectives.

## Grading and Evaluating Your Organization's Strategic Planning Performance

### Methodology

Each of the 10 strategic planning and implementation tasks has been cast as a question focusing on whether or not an organization's existing processes ensure the execution of them. For each question, you are asked to respond with a number from 1-5 indicating the frequency in which your organization completes each of the required strategic planning/ implementation tasks. These are as follows:

### Score Frequency Indicator

- 1 Very Rarely or Never
- 2 Occasionally
- 3 About Half of the Time
- 4 The Majority of the Time
- 5 All of the Time

### Evaluation questions

By using the above scoring methodology, you can now assess your overall strategic planning effectiveness by responding to the following questions:

1. Does your association have established strategic planning *cycle* linked to fiscal year-end and budgeting process? (*Circle one*)

1 2 3 4 5

2. As part of your strategic planning process, your association regularly assesses the relevance of mission and objectives in relation to the membership you serve. (*Circle one*)

1 2 3 4 5

3. Does your association operate on the basis of a professionally run planning process, supported by an external facilitator and/or a staff person dedicated to lead the planning exercise? (*Circle one*)

1 2 3 4 5

4. Does your association undertake environmental scanning and/or opinion surveys of key audience segments to serve as strategic inputs to the strategic planning process? (*Circle one*)

1 2 3 4 5

5. Does your association have a planning process which ensures the active involvement process of functional/operational unit heads? (*Circle one*)

1 2 3 4 5

6. Does your association follow up with a formal operational/planning process that translates the strategic plan into operational plan(s)? (*Circle one*)

1 2 3 4 5

7. Does your association have an employee work plan development process that clearly references goals set out in the strategic plan and ensures day to day implementation of operational plans? (*Circle one*)

1 2 3 4 5

8. Does your association have a quarterly reporting process whereby the Board of Directors receives updates on organization progress in meeting strategic goals set out in the strategic plan? *(Circle one)*

1 2 3 4 5

9. Does your association have an employee compensation process whereby employees are evaluated and rewarded based upon achieving operational objectives in support of the strategic communication plan? *(Circle one)*

1 2 3 4 5

10. Does your association undertake an ongoing program evaluation process whereby the impact of key strategies and tactics are rigorously assessed against defined objectives? *(Circle one)*

1 2 3 4 5

### **Calculating Your Organization's Strategic Planning Grade**

For grading purposes, you are asked to total your score based upon the 10 questions. The total numeric scores are then translated into a letter grade based upon the following:

<b>Total Score</b>	<b>Grade</b>
42 or More	A
37-42	B
31-36	C
25-30	D
24 or less	F (Fail)

### **Reading Your "Report Card"**

To help your organization interpret their grades, we provide some general observations that accompany each grade. Such comments, by necessity, deal in generalities. However, they do offer the basis for an assessment of an association's effectiveness in using strategic planning as a salient management tool. (See page 20.)

#### **Conclusions**

Measuring association strategic planning effectiveness is admittedly as much of an art as a science. Hopefully, the checklist and scoring system set out in this article provides you and your colleagues with one means by which to begin to critically assess your strategic planning and implementation processes. We also encourage you to use it as a framework to begin to re-engineer how you go about strategic planning in your department.

<b>Grade</b>	<b>Comments</b>
A	Your organization represents a best practice in its approach to strategic planning and implementation. Within your organization strategic planning is a powerful management tool for setting priorities, defining strategies, and determining performance benchmarks.
B	Your organization is committed to a regular, formalized, strategic planning process that helps to set strategic priorities.
C	Your organization has undertaken some strategic planning in an effort to set strategic direction. However, the lack of a disciplined process in each of the key task areas probably means that the results of the planning process do not offer the degree of priority setting they are otherwise capable of providing the organization.

- D Your organization displays a very limited commitment to strategic planning. When it is carried out it is ad hoc and is seldom translated into workable action plans that gain organization-wide commitment.
- F (Fail) Your organization fails to undertake even the basic elements of strategic planning. While occasionally senior management may convene a planning session, the virtual absence of follow-through renders the resulting plan useless.

Our experience in providing consulting services to associations in the area of strategic planning reveals much initial opposition. Many view strategic planning as a useless, navel gazing exercise that results in little more than yet another piece of paper to clutter one's desk. If your senior staff is not as committed to implementation as they are to the planning process, this assertion may well be true. However, an effective strategic planning process does not end with the planning session and resulting plan. Strategic planning should be an ongoing process of assessing how strategies support objectives. Those who fail to plan, plan to fail.