

## Strategic Plan Development & Implementation Oversight Policy and Process



The best way to maximize the use of the strategic plan as a “road map” is to maintain an ongoing process of plan assessment, reporting and updating. That’s why every organization with a strategic plan should also have a plan implementation oversight policy and process. Here are things to consider when developing that policy:

-Determine who will be responsible for oversight of each section of the strategic plan. How will staff and board committees work collaboratively on oversight?

-Establish an assessment calendar. While quarterly assessments are typically the standard, smaller organizations may find bi-annual assessments sufficient. Establish timeframes for tactical level assessments that will then be used to inform assessments at the governance or strategic level. Determine who will make these tactical assessments and the date by which they will be presented to the management team and board for review.

-Create a template or report format for presenting the assessment results. The easier this is to create and review, the easier the assessment process becomes. Organizations utilizing the WePlanWell online strategic planning tool have access to the easy to use Assessment function that automatically creates at-a-glance scorecard reports. This time-saving feature is one of key ways in which WePlanWell is helping organizations transform their strategic plans into strategic implementation.

-Determine a process for making changes to the plan. Consider who can make recommendations for changes at each level of the plan, and what approval will be required before the changes can be made. At the tactical level, where you typically find staff accountabilities, many organizations allow staff members to make recommendations for changes to the Executive Director who has the authority to approve the changes. Higher-level changes are presented by the staff (with the approval of the ED) to the appropriate board committee for review and approval. That committee can either approve the change or forward it to the full board for review and approval if they deem it appropriate. At the strategic level of the plan, suggested changes come through the board committees and must be reviewed and approved by the full board.

-Update and distribute the plan documents each time a change is made to assure that everyone in the organization has access to the most current version. Before making changes export a copy of the existing plan document for archival purposes. Organizations using the WePlanWell tool are able to make all changes in the online database, meaning that most current version of the plan is immediately available to all participants. This eliminates the burdensome effort of updating Word or Excel documents and distributing them throughout the organization.

iBossWell has created a comprehensive Strategic Plan Implementation and Oversight Policy Template for clients to use as a foundation for their own policies. If you are interested in receiving a copy of the template, or would like more information about iBossWell consulting services or the WePlanWell online strategic planning tool, please contact us at [contact@weplanwell.com](mailto:contact@weplanwell.com)