

KEEPING THE PLAN ALIVE

Almost more important than planning itself is using the plan to make decisions going forward, monitoring its progress, and tweaking your activities as you move forward.

TRANSFORMING THE BOARD ROOM

1. **AGENDAS:** Use the plan to build board agendas - if it isn't on the plan you ought not be talking about it.
2. **ANNUAL GOALS:** Assemble annual board goals inspired by the plan and stay on topic.
3. **IDEAS:** Practice referral strategies when ideas arise - don't take up board meeting space with non-strategic items.
4. **CHAMPIONS:** Designate Champions for each goal area so individual board members have responsibilities for the plan's success and assign goals to committees to oversee their implementation.
5. **ONBOARDING:** Make sure new board members understand the plan as part of their first activities.
6. **MONITORING:** Agree on a tool and timeline for updates being presented to the board that is not labor intensive for staff and keeps the board focused on strategy.
7. **ANNUAL REVIEW:** Commit to a formal annual review process as part of a retreat or check-in to look back and look forward.

WHAT IF THE WORLD CHANGES?

The answer to losses in funding, new funding, and dramatic changes can be found in your plan. While the specific item to be considered might not have been thought of, the plan should serve as your North Star. Stay true to the guts of the plan because you worked hard on the plan and using consensus arrived at these decisions together.

