



EXECUTING YOUR STRATEGIC PLAN

This guide assumes you have already determined the content of your strategic plan.

PREPARE	Produce Your Strategic Plan Document <ul style="list-style-type: none">▪ Create a 1-4 page version that is targeted to your broadest audiences, including potential funders. Details can go in internal, action plans.
	Communicate <ul style="list-style-type: none">▪ Develop a communication plan: what messages, to whom, how, when? See <i>Communication Plan</i> template (page 2).
LAUNCH	Define and Plan Action <ul style="list-style-type: none">▪ Create a <i>Charter</i> (see page 3) for each major initiative.▪ Assign leaders, teams.▪ Teams create action plans. See <i>Action Plan</i> template (page 4).
	Align Your Resources with Your Priorities <ul style="list-style-type: none">▪ Determine what is needed to achieve your priorities: People, funding, equipment, space, training/development.
	Align Subunit Plans <ul style="list-style-type: none">▪ If your plan covers multiple units, it may make sense for each unit to develop its own plan in alignment with the larger unit.
EXECUTE	Manage Implementation <ul style="list-style-type: none">▪ Monitor and report progress▪ Highlight successes: stories, photographs, charts, progress reports.
	Sustain Momentum <ul style="list-style-type: none">▪ Communication: web, podcasts, talks, publications.▪ Web site – link to initiatives, invite interaction, show progress▪ Infuse into meeting agendas, hiring decisions, fundraising, etc.▪ Recognize, celebrate progress.
CHECK	Evaluate and Update <ul style="list-style-type: none">▪ Review progress annually (or more frequently). Update plan if needed.▪ Officially close out completed projects.▪ Recognize, celebrate success.▪ Fold “lessons learned” from assessing your accomplishments into the next plan.



Project Charter

Document last updated:

Project Title	
Priority/Initiatives this project addresses	
Sponsor/ Decision Maker	
Project Lead	
Key players/Partners	
What do we want to accomplish? Purpose/aim.	
What products are expected? When?	
How will we know we have made progress? (Indicators of Success)	

Note: Adapt this template to fit your needs and terminology.

ACTION PLAN

Priority/Initiative:		Indicators of Progress/Success:	
Action steps	Lead.	Others Involved.	Time Frame/Dates