

10 Steps for successful Planning Days for associations

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The reason associations must plan is clear: if an association doesn't agree on what it wants to do, it will be harder to achieve desired outcomes. A documented annual plan needs to be initially developed at a face-to-face Planning Day, attended by the Board and CEO, and then actioned by the association management.

1 *Commit to holding, and sell the concept of, an annual Planning Day*

Plans require the leaders of the association to get together for a Planning Day. This is the most important gathering each year for the Board of Directors, CEO and often some of the senior managers. Whilst necessary for compliance, AGMs are for the end of the planning process and for reporting on plans that were implemented more than a year beforehand.

2 *Engage an association-aware independent facilitator*

It is vital to engage a facilitator who can coherently document the ideas from the Planning Day and who understands associations. Association-aware facilitators can also add input on what other associations are doing for consideration by the Planning Day attendees. Respected external facilitators will keep the group focused and on-track to get a result within the allocated time.

3 *Schedule the Planning Day months in advance*

It is important for the whole Board of Directors to be in attendance at the Planning Day. Establish a date that is likely to work for the majority and give people plenty of notice. The significance of the day should be continually promoted so that the chances of someone not attending is minimised.

4 *Let the facilitator draft the agenda for the Planning Day.*

Facilitators have their own style, so they are the ones best placed to develop an agenda to suit their methodology. Whilst feedback by the association on the facilitator's draft agenda is needed, the association needs to trust the professional facilitator to achieve the desired results in their own way.

5 *Have an annual plan including long-term targets rather than a time-limited plan.*

Planning days should be held every year and the rolling plan should be for the coming years rather than for a set period such as 2017–2020. Whilst long-term planning is important, the master plan needs attention every year to keep attention focused. Three year plans run the risk of less attention being paid to the association's focus for the latter two years of that plan.

Associations Forum regularly assists associations and charities with Planning Days that lead to clear and concise plans.

Please contact Kathy Nguyen on kathy@associations.net.au or 02 9904 8200 for more information and testimonials from our Planning Day clients

6 *Work together as a united group on the plan.*

Planning days are not usually occasions to break into small working groups. It is a shared day where everyone should hear what everyone else has to say regarding the plan. Having shared ownership of the plan is paramount and this is not achieved as well when small groups discuss side issues separately.

7 *Write one plan, with the option of sub-plans for different activities.*

Preferably avoid having a "strategic plan" and then a separate "operations plan" or "business plan". Associations need one comprehensive plan highlighting a few activities that are considered priorities. Many activities will need a further sub-plan with details such as who is responsible, timing and measurable key performance indicators.

8 *Make plans clear, logical, connected and straightforward.*

Some associations make their plans too complex or long when the outcome from the Planning Day should be clarity and brevity. The Board and any CEO should all know what is to be achieved because they have worked together as a team to develop the plan.

9 *To varying degrees, share the plan with staff, committees and members.*

As well as the governing Board, which plays a role in monitoring achievement of its proposed outcomes, a plan needs to be written down and shared among the people tasked with the activities. Further, members and sometimes external stakeholders will be impressed with evidence that the association is organised and focused on achieving its targets.

10 *Use the plan as the basis for staff operations and the governing Board's monitoring role.*

The more successful associations are those with sufficient funds to employ a capable CEO and staff to manage the association. This allows the Board of Directors to play a governance role, including monitoring the CEO's achievement of the plan. The association's plan should be referred to at quarterly face-to-face meetings and be the index to the agenda for Board meetings.

Conclusion

Having a current and straightforward plan is crucial for associations getting things done. Sometimes an unanticipated result is the motivation and positive vibe from Board Directors and CEOs who say "Aha, now I know exactly where the association is going." ☺