

When Does Strategic Planning Become Merely An Academic Exercise?

By Brenda Kelleher-Flight Ph.D.

Strategic planning becomes an academic exercise when one or more of 10 conditions exist.

1. The strategic plan is developed by the CEO, the CEO and the board chair, the board chair or an by external consultant.

The board members accept ownership when they participate in the process and the plan reflects decisions of the full board.

2. When the plan is not based on sound data gleaned from a thorough scan of the internal and the external environments.

It is essential to base the plan on sound data rather than on personal opinions or personal priorities.

3. The mission, goals and objectives are not realistic and achievable within current resources.

A strategic plan is not a wish list. Therefore, all outcomes are to be accomplished within the entity's resource envelope.

4. The goals and objectives state outcomes or outputs which are outside the board's mandate.

It is vital for boards to recognize that they cannot accomplish what they cannot control. Where necessary, they can, however, approach those entities which do have the mandate to achieve the desired outcomes.

5. The time frames for the goals are too long.

Change occurs so rapidly that it is unrealistic for boards to make plans to far into the future. Therefore, boards will have more success if they focus on goals which can be accomplished within a three- or four-year timeframe.

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6. The strategic plan is not translated into action plans with assigned responsibilities.

Key players change throughout the life of a plan. As a result, the mission, goals and objectives get interpreted in different ways. The original intent is preserved only when the objectives are translated into clear action plans which allocate work-time, stipulate time-frames and deadlines, name responsible persons, outline budgets, and describe the outputs expected.

7. The accountability for achieving the goals and objectives is assigned to the CEO.

If the plan is truly a governance plan, the accountability cannot be assigned to the CEO. The CEO may only be assigned responsibility for achieving aspects of the plan on behalf of the board.

8. The board does not focus on the plan in each of its meetings.

As the accountable body, the board ensures that one of the priority items on its agenda is the progress being made toward the achievement of the objectives, goals and mission stated in its plan.

9. The board shifts priorities from those stated in the plan.

It is extremely difficult for the CEO when the board states one set of outcomes in its plan and then proceeds to establish another set of priorities. Before establishing a new priority, it is vital for the board to ensure it is in harmony with the strategic plan. It is also critical to ensure the entity has the resources to fulfill the new priorities as well as those published in the plan.

10. The board does not use the plan when it reports to its owners.

Anybody can make up an annual report. It takes a conscientious board to develop and implement a plan and accept responsibility for the results attained.