**SONA Best Practice Summit Notes**

***Background***

Participants from seven United States Programs, including Board members, Program CEOs, and Program COOs, gathered from July 26-27, 2011 in Chicago in order to discuss Program strategic planning and how best to make plans actionable. On day one, the representatives reviewed their Programs’ strategic plans, gave an overview of their planning processes, and then discussed what “best practice” planning should look like. This document attempts to capture what was discussed.

***Creating a strategic plan recommendations from Day 1***

After reviewing seven Programs plans, the team addressed a series of questions. Their responses are captured below.

1. *What features, if any, should always be present in a Program strategic plan (regardless of size or maturity)?*

All participants agreed that any Program strategic plan should stay true to the Movement-wide mission and vision for Special Olympics. It should also be consistent with any provisions listed in the *General Rules*. There was some lively conversation about how the global 5-Pillars framework could be best applied at the Program-level. Programs drew upon anywhere from 3 to 5 of the Pillars. Our final consensus was that all strategic plans should include the three mission driving Pillars: Advance Sports, Build Communities, and Fans & Funds. While Movement Leadership should be a concern for all Programs, some people argued that leadership development activities weren’t best captured within a plan. In some cases, Program representatives felt that Sustainable Capabilities was a purely SOI relevant Pillar that didn’t entail a strong strategic commitment at the Program-level.

1. *What does a “best practice” strategic planning process look like? What are the key steps and tools used? Who is involved?*

Participants agreed that a “best practice” strategic planning process should have a few key features, including:

* A strong leader, usually a CEO or COO, committed to driving the planning process and coordinating the participation of various stakeholders
* Support of a Program board which has opportunities to provide Program management with feedback, but allows the Program leadership to drive the planning process
* Constituent feedback solicited through surveys, focus groups, town halls, or other feedback collection mechanisms from:
  + Staff
  + Board members
  + Coaches
  + Athletes
  + Volunteers
  + Sub-Program representatives
  + Current and former donors and sponsors
* An emphasis on educating constituents on the importance of the plan and its implementation—even in the data gathering phase of planning
* A focus on creating SMART goals (specific, measurable, attainable, relevant, and time bound) and an emphasis on outcomes as opposed to output
* Clearly defined roles and expectations for all key players
* A process for defining final strategic priorities
* An initial implementation calendar which defines which activities will be started in a given year

*3. Under what circumstances should “best practice” planning look different? For example, when a Program is newer? Smaller? Has fewer resources? How should both the process and resulting plan change, if necessary, in each scenario?*

The Program representatives were able to pull upon the experiences of the group in order to conclude that both plans and planning processes should be adapted to Program resources, planning experiences, and priorities. That said, they agreed that all plans, from the most basic to the most detailed, should have some global alignment—including a shared terminology and use of at least all three of the mission driving Pillars. They also recommended that all Programs seek out key constituent feedback.

*4. What parts of the planning process are most challenging? Why? How can Programs go about effectively overcoming these challenges?*

Program representatives agreed that effectively soliciting and interpreting constituent feedback was the most significant challenge when it came to identifying strategic priorities and guaranteeing plan buy-in. While getting “face time” with key players could be challenging, they agreed that this was an important activity that would require each Program to be creative and test out different methods for data collection. Programs achieved varied success through using town halls, surveys, and other feedback collection mechanisms.

An additional challenge was communication among key planners and constituents. The Program leaders noted the importance of a clear communication plan for communicating planning objectives, timelines, deliverables, and opportunities to provide feedback.

*5. What tools, if any, have been helpful in this process?*

Program leaders again commented on the importance of the global mission, vision, and Pillars in guiding their own strategic planning processes. Some mentioned how planning and survey templates provided by SOI were valuable tools.

*6. What could SOI/SONA do to better support Program planning?*

The participants wanted a clearer view of SOI initiative sequencing and rollout. Many participants found the strategic menu provided by SOI to be overwhelming. They also recommended that SONA complete its plan in August or only develop a plan once every 2 years, so that Programs would have more time to adapt their work to what is happening globally. The SOI team admitted that it would be hard to accelerate the SOI planning timeline. A few Program representatives recommended that SOI develop a National Training Center in order to support Program-level planning and implementation activities. Finally, some Programs asked for translation support.

*7. What advice, not given above, would you give to a Program that was about to start the planning process?*

Not all Program leaders had seen SOI tools and material in advance of creating their plans and designing their planning processes. They all recommended that other Programs look at SOI tools, including planning templates and surveys, as well as other available Program strategic plans. They also recommended that Programs who were new to the planning process seek out partner Programs to shadow or serve as mentors in planning.

*8. What, if anything, would you do differently, or recommend that SOI do differently, in the next planning process?*

Participants commented that the next global Strategic Plan shouldn’t feel like an entirely new document. It should retain its current terminology and 5-Pillar structure. If anything, it should have fewer initiatives in order to more clearly signal global priorities. Many participants felt that the process should be sped up, so that it could be completed within a single year. All agree that a Global Congress was hugely beneficial for promoting organizational alignment.

***Implementing a Program strategic plan discussion from Day 2***

On Day 2, we asked Program leaders to identify the top challenges that they faced as they moved from Program planning to plan execution. We then divided the team into two groups. Each of these groups was asked to choose four or five of the biggest challenges and then recommend ways for addressing them. These challenges and their recommendations are captured below.

*Building the plan into the organizational infrastructure and creating accountability*

*Challenge:* keeping the plan alive and front and center over the course of multiple years.

*Solutions:*

* *Involve key players from the beginning*: the plan and its call to action should not feel like a surprise to Board members or staff. They should be involved in planning from its earliest stages. They should also be thoroughly educated on the plan and its call to action upon the plan’s final release.
* *Link to performance objectives*: employees should feel responsible for the success of the Plan. It should be clear which employees are in charge of driving particular initiatives and achieving certain outcomes. Performance reviews should be tied to people’s abilities to reach their targets.
* *Build regular plan review into staff and Board meetings*: a few Program representatives mentioned that the plan was discussed at every Board meeting. Others organized their agendas into Pillar categories. All mentioned that it was important to build regular reviews and planning terminology into their meeting infrastructures. One representative commented that a plan should be reviewed every 90 days to make sure that performance was on track and actions could be adjusted, if necessary.
* *Make it interactive and fun*: planning can feel overwhelming, especially to volunteers and people who haven’t done it before. To celebrate planning, one Program had the staff watch a movie and write slogans on posters that were put on their walls. Another Program set up a competition in which employees could enter strategic plan videos. These Programs felt that it was critical for staff to see planning as an enabler for success instead of a burden.
* *Make it omnipresent*: one representative recommended that the 5 Pillars be installed as screensavers on all employee computers. The key point is that the plan and goals should be visible and known throughout the organization.

*Measuring success*

*Challenge:* tracking progress and measure success.

*Solutions:*

* *Develop a system*: develop a standardized system or scorecard for tracking progress and sharing implementation status with key stakeholders.
* *Link metrics to the plan*: key success metrics should be linked directly to the strategic plan. Their achievement should lead to strategic success and the improvement of the athlete experience.
* *Focus on outcomes*: while measurement is a key part of any planning process, staff should focus on outcomes instead of output. They should understand how what they do helps to improve the athlete experience.
* *Plan for data collection*: it is hard to deal with a number of one-off data requests. Understand your data collection needs and timeline in advance and clearly communicate these needs to sub-Programs.

*Managing a living document*

*Challenge:* resources, priorities, and opportunities can change over the course of a few years. While we want to use the plan as a guiding document, the plan may need to change to reflect organizational realities. The question is how best to think about change and adjustment.

*Solutions:*

* *Use the plan to set boundaries*: the plan should define top priorities over a 5 year period. Reference it when you are deciding how best to allocate resources or approach new opportunities. If a new activity is not in your plan, consider it carefully before taking it on.
* *Don’t set your own fires*: use the strategic plan as a planning and process guideline, with exceptions only for unexpected risk management issues, donor changes, or other external disruptions. Make changes to the plan only when the Program has given regular thoughtful consideration to doing so. Otherwise, do not 'start new fires' with unrelated projects, initiatives or programs.
* *Update the playbook*: when something just isn’t working, change your tactics. There is no need to keep walking into a dead end.

*Involving sub-Programs and other Movement members*

*Challenge:* Plans can’t be achieved through the sole support of staff and Board members. Successful implementation requires the support of coordinators, volunteers, coaches, athletes, and other key Movement members.

*Solutions:*

* *Over-communicate*: key stakeholders should hear about the planning process well before a plan’s launch. They should be actively engaged through mechanisms that encourage their feedback. Upon launch, Programs should communicate how the plan is a clear response to stakeholder feedback. They should also communicate Program-level goals as well as individual calls to action for each stakeholder. Communication approaches and materials should be tailored to individual stakeholder groups.
* *Incentivize participation*: Some Program representatives gave a cash incentive or a tank of gas to the sub-Program that was most aligned with the Program-level goals. Other Programs have the CEO say “thanks” or highlight planning or implementation successes in their sub-Programs. Regardless of the exact tactic, Programs should develop plans for incentivizing or thanking sub-Programs and other stakeholders for supporting their Program plan.
* *Encourage sub-Program planning*: Not all sub-Programs have an interest in, capability for, or capacity to create a plan, but plans exist in some sub-Programs. In these instances, Programs should encourage sub-Programs to align their plans around the Pillars and connect to Program-level goals. In cases in which sub-Programs do not plan, Programs should work with sub-Programs to ensure that they are supporting Program planning goals and objectives.

*Top takeaways*

At the end of the meeting, we asked each Program representative to share one thing that he or she would do differently in the next planning process. This is what was shared:

* Include both current and past donor feedback in the planning process
* Try to create a greater financial reserve in order to fund new strategic priorities
* Create cross-functional planning groups in order to help staff understand what other departments in the organization are doing, incorporate new perspectives, and create greater buy-in for the plan
* Reach out to other Programs in order to understand how they are thinking about planning
* Distinguish between output versus outcomes in defining and measuring goals
* Create a clear timeline and plan for the entire planning process before it launches