

Training Guide

Tactical Planning:

From ideal to real



urbanASKEW's MISSION:

urbanASKEW works with local leaders, business owners, and organizations to create strong communities through our education, engagement, and empowerment services. We provide the training, support, and guidance needed on the journey of revitalization, believing that success comes from the community up.

KEY POINTS:

Board Development

The continuing education of board members in order to institute best practices and an efficient workflow.

Accountability is Key:

This guide is focused on Tactical Planning, but planning is only as good at the commitment made. Accountability is the No. 1 stumbling block to accomplishing goals.

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A LITTLE CONTEXT

FROM IDEAL TO REAL

A **strategic plan** is a document used to communicate the organization's long-term goals looking 3 to 5 years out, the actions (in big terms) that are needed to achieve those goals, and other critical elements needed in support of the goals stated.

In planning terms, the **inspirational viewpoint aligns with a strategic plan**. It contains your dream (vision), the journey (strategy), and destination (goal). All of these are key elements to an organization's success.

A **tactical plan** sets specific short-term actions and plans regarding the organization's basic functioning for the next 12 to 18 months: board, committee, finances, and programming, and can be the key to making organizational progress with or without a strategic plan.

To think in terms of a **tactical plan**, the **organizational leadership needs to think about practical elements** such as the steps (purpose), acts (tactics), and results (objectives), bringing the ideal to real.

WHY TACTICAL PLANS MATTER

A **tactical plan** is vital for the overall health and happy running of an organization. It gives a clear path to those involved: board members, committee members, volunteers, and constituents. **Tactical plans** allow organizations to see the progress they are making and feel encouraged and empowered to accomplish more. **Tactical plans** are a great way to clear up logjams and worries by putting the most immediate concerns down, plotting out actions needed, responsible parties, due dates, and expected outcomes.

ROOTS IN REALITY

Tactical planning is rooted in the realities of the everyday life of your organization - your abilities and your limitations. They breakdown your strategic goals into the daily grind of action steps. **Tactical plans** provide an immense amount of freedom, comfort, and empowerment. Sometimes organizations are so worried about issues that they feel overwhelmed and frozen in place. **Tactical plans** break down fears into action steps, they also take the goals from strategic planning and ensure they get accomplished.

ACCOUNTABILITY IS KEY TO SUCCESS

Organizations have lots of different things they need to juggle: operations, programming, fundraising, governance. **Tactical plans** help to break down the urgent and the not-so-urgent, recognizing what needs to get done now and what can be planned, delegated or dropped, allowing the organization to focus on the most immediate actions. **One of the biggest stumbling blocks in accomplishing tasks is accountability.** Boards need to have honest conversations about who is willing and able to take on tasks and when the task is due. Board members are volunteers with the pressures and pleasures of everyday life. Sometimes working on an organizational task is the first thing to get dropped when life gets busy. Having a discussion that lays out an understanding of ability, time-frame, and accountability early and often keeps everyone in check with the opportunity to adjust if needed.

THE FUNDAMENTAL PIECES

Many organizations don't know where to start and feel overwhelmed by all the seemingly immediate and urgent items on their to-do list. **Tactical plans** lay out a clear strategy by breaking down goals into manageable actions with realistic expectations and outcomes.

All tactical plans should have the following items:

- Goal (relating to the issues at hand)
- Projects needed to accomplish that goal
- Description of what needs to occur (i.e. action steps)
- Owner (person responsible for management of each action step and/or project)
- Due date
- Expected outcome

By breaking down the big-bad scary issues at hand for an organization into these parameters, a board is able to feel in control of their organization once again. Each action step accomplished brings them closer to the end goal, building trust and enthusiasm for building a better, smarter, more efficient organization that can focus on their programming and mission.

Let's SWOT



SWOTs are a common way of evaluating where an organization stands, what are its greatest attributes and greatest areas of improvement. SWOT stands for **Strengths - Weaknesses - Opportunities - Threats**.

The SWOT process helps participants uncover opportunities that can be quickly taken advantage of for achievable successes and provide a deeper understanding of the weaknesses that face the organization and community. These weaknesses, once identified, can be conquered with targeted plans, goals and action steps - this is where strategic and tactical planning come in handy.

There are some key factors that are needed to complete a useful and insightful SWOT analysis.

- **Complete honesty** - about yourself, your organization, and your programming.
- **Schedule time for the SWOT.** SWOTs take time and concentration and work best when they are the only thing on the table. This means scheduling a special meeting or retreat to conduct the analysis and not trying to fit everything into a regularly scheduled board or committee meeting.
- **Commit to your findings.** A lot of wonderful information will be brought up during the SWOT analysis. It is on the board to take these findings and create a plan for either promotion (of strengths/opportunities) or action (of the weaknesses/threats). This is where tactical and strategic plans come into play.

The Planning Process

IMMEDIATE VS. LONG-TERM NEEDS

Tactical Plans are all about the NOW. What do you need to do in the next twelve to eighteen months to move forward, achieve goals, feel solid footing beneath you. **Tactical plans** focus on action.

How do you root out the most important actions?

This is where a task-setting matrix helps. It clears up all the issues that sit in your organization's collective brain and breaks them down into four clear categories: do it now, plan it, delegate, and drop. You may be thinking "I can't drop anything!!" but the truth is, there will always be some items that seem important in your mind that, when written down, actually aren't.

Take a few moments and write down all of the issues your organization faces right now. There is a power in writing things down. Many times the things we worry over in our brains don't seem so terrifying when on paper. At the end of the exercise, there is a relief because the organization now has a plan, a path, a set of tasks to be worked and accomplished.



It's time to
get RACI



RACI is the cornerstone of task setting and communication planning. It breaks down: who is **responsible**, who is **accountable**, who is **consulted**, and who is **informed**.

R - Who is responsible?

Look at the items listed in the DO IT NOW section of your matrix. Who is going to spear-head, or be responsible, for each item? Who are you going to assign to do the work? Take each item or task and figure out who is both willing and able to take the lead on the task. Don't forget, you may need a team to accomplish it.

A - Who is accountable?

Accountability is the person who makes the final decision and has the ultimate ownership of the task. Is it the committee chair under which the task falls? Is it the board? A staff person? Every task needs accountability. A deeper question is: What does accountability look like? If there is no accountability set and expected, success in accomplishing the task falls dramatically.

C - Who is consulted?

Who is the person who must be consulted before a decision or action is taken? Every action needs a level of checks and balances. The best of intentions sometimes can throw the entire process (and organization) off the rails because an action hasn't been approved by the right people. Often, consultation can take the form of a motion at the board level. Sometimes, it's just checking in with the committee chairperson or a discussion at the committee level.

I - Who is informed?

Being informed happens after the action is taken. Some actions will be responsible, accountable, and consulted at the committee level and the board is just informed of what has been accomplished. In other cases like an organization with membership, the members are informed at the annual meeting of all the tasks accomplished for the previous year. You also have a level of communication to your consultants - how are you going to tell the story of accomplishment? It can be done through social media, direct conversations, and marketing materials.

RACI Definitions

WHO IS ACCOUNTABLE?

The person or committee who makes the final decision and has the ultimate ownership of the task.

WHO IS INFORMED?

The person or people who must be informed that a decision or action has been taken.

WHO IS RESPONSIBLE?

The person or committee assigned the task.

WHO IS CONSULTED?

The person or committee who must be consulted before a decision or action is taken.

A young boy with short brown hair, wearing black-rimmed glasses, a light blue collared shirt, and a red bow tie with white polka dots. He is smiling broadly, showing his teeth. He is holding a stack of four books with red covers in front of him. The background is a green chalkboard with some faint, illegible writing and a few small yellow marks on the left side.

SMART Goal Setting

SMART Goals provide realistic and clearly defined actions needed to accomplish stated objectives within your organization and the tactical plan.

S - Specific & Clear

What exactly do you want to accomplish? Is it clearly defined with language that lays everything out in a way where everyone involved understands? Is it specific as to what actions you need to take and what outcomes are expected?

M - Measurable

What does success look like? What are the tangible outcomes from your action?

A - Achievable

Is your goal achievable? If your organization wants to raise \$4 million this year - great! But can it? It's best to set achievable goals because the sense of pride in accomplishing the task acts as a motivator to achieve more tasks set in your tactical plan. In addition, achieving your goals builds trust within the community and with current and future donors as well.

R - Relevant & Recorded

Does the goal match up with your tactical plan, strategic plan, and organization's mission? Are you recording the goals you want to achieve? And, are you recording your successes as a way to share your story with the community, donors, and potential grants/foundations?

T - Time-Bound

A goal without action steps and a due date is only a dream. You need to set deadlines for actions and the accomplishment of the overall goal in order to really succeed. Time-bound goals add accountability to achievement.

SMART Goals

SPECIFIC & CLEAR

What exactly should be realized?

MEASURABLE

How will you measure your success?

ACHIEVABLE

Is this goal feasible and do you have control/influence over it?

RELEVANT & RECORDED

Is the goal recorded and relevant to your business right now?

TIME-BOUND

What is a realistic timeframe?



Pulling it all
together

TASK SETTING FOR TACTICAL PLANNING IS A BASIC FUNCTION OF ACHIEVING YOUR GOALS.

Project Worksheets, when combined, create a majority of your organization's **tactical plan**. All of your project sheets should align with the journey your organization wants to take, laying out the route upon which it needs to travel.

WORKSHEET ELEMENTS

Project Name:

What action do you need to take?

Project Team:

Who is going to be responsible for this project and the process steps needed to accomplish it? Is it a committee as a whole? An individual? A team of three people? This sets the responsibility and accountability for the project.

Purpose/Mission of Project:

What do you want this project to accomplish and how does it fit in with the overall organizational goals you have?

Expected Results:

A brief statement of what a successful and accomplished project will look like.

Due Date:

When will the overall project be completed by? It is also recommended that you have due dates attached to each action step for clarity and overall time-bound success.

Deliverables/Key Milestones:

What do you want this project to accomplish? Is it an increase of 15% in your membership? A marketing plan for an upcoming fundraising event? What does success of the project look like?

Action Steps:

What are the actions needed to accomplish the previously stated deliverables and milestones? Write them out as completely and as specifically as possible so that the entire board understands what needs to be accomplished.

Communications Plan:

This is your RACI - who is responsible, accountable, consulted, and informed. Beyond that, how are accomplishments, pitfalls, and areas of opportunity communicated to each of those segments?

Alignment To Other Projects:

This project may work in conjunction with other stated projects within your tactical plan. It may need to be accomplished prior to another project's start or after another project's completion. State how these connect.



Project Worksheet

Project Name:

Project Team:

Purpose/Mission of Project:

Expected Results:

Due Date:

Deliverables/Key Milestones:



Project Worksheet

Action Steps:

Communications Plan (RACI):

Alignment to Other Projects:

HOW TO USE THIS GUIDE

This guide is meant to lead you through **Tactical Planning Basics**. Additional guides covering **Board Basics**, **Committees & Board Meetings**, **Organizational Communications**, and **Organizational Planning** are also available through urbanASKEW. The guide is most effective when reviewed by the whole Board of Directors either in a retreat setting or section by section at board meetings.

urbanASKEW offers in-person and virtual board trainings on a regular basis. Our team can work with you to tailor a training that meets your organization's specific needs.

More details about urbanASKEW, our services, and additional guides can be found at:
www.urbanaskew.com.

