

2016 ActionStrategy Planning Guide for Tribal Leaders

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INTRODUCTION

Our mission is to develop 'strategic leaders' who are instrumental in creating positive change in their communities. We believe there are tools and insights in this guide that will help you create that positive change. This guide represents our collective 20+ years of experience in helping leaders develop clear actionable plans that produce improved results for tribal members. We have discovered that the strategic planning process can be streamlined and accomplished in 1-3 days as opposed to a process that typically takes 1-3 months.

TRADITIONAL STRATEGIC PLANNING – POTS (Plans on the Shelf)

Planning, in its present form, actually can interfere with meaningful implementation. Can you relate to any of these characteristics of a traditional strategic plan?

- Takes too long to develop (months)
- Plans are too lengthy (50 – 150 pages)
- Leaders don't confront reality
- Not actionable – doesn't integrate implementation
- No method for tracking implementation



21st CENTURY STRATEGIC PLANNING

The 'ActionStrategy' approach is specifically designed to address the weaknesses of traditional strategic planning. It dramatically improves the likelihood that organizational, department and program planning get implemented. Key features include:

- Streamlined (developed in 1-3 days)
- 1-2 pages long
- Starts with reality – critical problems, opportunities and issues are addressed
- Integrates strategic and implementation planning
- Implementation is tracked online utilizing technology such as ActionStrategy

ACTIONSTRATEGY – Anatomy of a 21st Century Strategic Plan

We want to give you a picture of what an 'actionable' plan or ActionStrategy looks like. The result of this planning methodology is a plan that integrates **your strategy and implementation** plan. Your plan can be managed using an online tracking system. The tracking system provides leaders with the flexibility to dynamically make adjustments to the planning and implementation process and monitor progress against the goals and projects.

EDIT	STRATEGY / PROJECT / TASK / SUBTASK	OWNER				
	1.0 ADMINISTRATION					
	1.1 Get off high risk SAMHSA grant	Tafuna Tusi			01/01/2016	
	1.2 Organizational structure and effectiveness	William Snell			08/28/2015	
	1.3 Revenue strategy - \$150,000	Cindy Washakie , William Snell	08/29/2015	12/31/2015		
	1.4 Rebuilding relationships/partnerships with stakeholders	Dyani Bingham			08/01/2016	
	1.5 Strategic planning		08/30/2015	08/31/2015		
	1.6 Policy Development					
	1.7 Team development (program directors)	William Snell				
	1.8 Financial structure					
	1.9 Increase visibility and involvement in the communities					
	1.10 Capacity and resource building					
	1.11 Build accountability into our systems, establish measures and review quarterly					
	2.0					
	2.1	sources To Select Insurance	Cindy Washakie			
	2.2	HE, Apply, And Enroll In	Cindy Washakie			

THE ACTIONSTRATEGY PLANNING CHECKLIST

Many tribal planning efforts get bogged down because the ‘finish line’ for completing the plan isn’t well defined. We would like to introduce the concept of a planning **checklist** that helps you define and standardize steps that each department and program will take when completing their strategic plan.

When you board an airplane, you might notice the pilots working through a checklist of items for safety purposes. One report estimated that between 60%-80% of airplane accidents are due to human error. In high stakes industries like healthcare and air travel, checklists have been standardized to mitigate human mistakes.

The ActionStrategy checklist helps tribal leaders understand the planning steps which complete the planning process and clearly identify the ‘finish line’. The planning checklist lies within a framework of three key phases – **Strategic Thinking, Strategic Planning and Strategy Implementation.**

Strategic Thinking comes first. This is the analysis phase. Like a good doctor who diagnoses the issue before prescribing a treatment, a good strategist first analyzes what is happening inside and outside the organization before developing goals and strategies. **Strategic Planning** is about exercising ‘strategic choice’ – actively saying yes to those things that will improve the health of the community and say no to things that will distract. The only plans that have any influence on results are those plans that are **implemented**. The third phase is all about translating your plans into manageable work where individuals are held accountable for fulfilling their responsibilities.

STRATEGIC THINKING		STRATEGIC PLANNING		STRATEGY IMPLEMENTATION	
1	Ask Strategic Questions	4	Compelling Purpose – M/V/V	7	Project and Grant Management
2	Analyze your Environment	5	Focus on SMART Goals	8	ActionStrategy Plan Reviews
3	Analyze Org. Capacity	6	Align Strategic Drivers		

YOUR STRATEGIC PLAN’S PURPOSE

Everything on earth has a purpose – Mourning Dove

Your strategic plan may have a number of purposes – to meet your funder’s requirement, to provide a framework for a new program, to **get everyone on the same page** and so forth. At its core, your strategic plan’s purpose is to **define how you are going to solve particular problems or take advantage of opportunities**. The starting point for good strategy is not goal setting, it is identifying the problems your leaders and organization need to solve. As Richard Rumelt, the author of “Good Strategy/Bad Strategy” stated:

“Bad strategy tends to skip over pesky details such as problems.”

Your plan documents how your organization is going to *work together* to address these problems and take advantage of your opportunities. Sample challenges and opportunities might include:

- Healthcare
- Substance Abuse
- Public Safety
- Housing
- Preserving Families
- Preserving Language and Culture
- Organizational Capacity
- Governance

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STRATEGIC THINKING: 1. Asking Strategic Questions

“If I had an hour to solve a problem and my life depended upon the solution, I would spend the first 55 minutes determining the proper question to ask. Once I knew the proper questions, I would solve the problem in less than five minutes.” – Albert Einstein

A good planning process begins with a list of questions that need to be addressed by your plan. In essence, your strategic plan is the answer to these questions. Three core questions are;

1. What problems need to be solved by our strategy?
2. What opportunities should be pursued?
3. What questions need to be asked?

When we work with tribes, our first step is to have them identify their problems and opportunities. Then we prioritize according to potential impact. It is powerful when a group of leaders comes to an agreement on what their most important issues are. It is helpful to ask additional questions that are organizational specific, like:

- What are the most significant needs of our tribal members?
- How do we enhance our revenue?
- How do we improve collaboration with key partners?
- How do we make X business profitable or should we sell the business?
- How do we engage our employees to take ownerships for results?

The challenge is that the largest problems may be **within** the organization and it is uncomfortable for leader to ‘confront’ them. One leader stated that there were so many trust issues with staff; it wouldn’t make any sense to work on strategy until those issues were addressed.

Execution is a systematic way of **exposing reality** and acting on it. Most companies don’t face reality very well - *that’s the basic reason they can’t execute.*

- Ram Charan and Larry Bossidy *Execution: The Discipline of Getting Things Done*

We can’t solve problems that we are unable or unwilling to see. This requires leaders to Confront Reality. Confronting Reality requires that leaders have the **courage** to acknowledge difficult problems and while still providing hope that these problems can be overcome. **The Creator has put you in a unique position to serve your communities by drawing upon your wisdom, gifts and talents to address these problems.**

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STRATEGIC THINKING: 2. Analyze Your Environment

A good strategic leader is able to look to the future and prepare a strategic response to potential risks and opportunities. This step requires that you look at your organization in the context of what is happening **outside** of the organization or the Environment. Two tools to help your planning team accomplish this goal are **Stakeholder** and P.E.S.T. **Analysis**.

Stakeholder Assessment and Analysis

“What your customers care about is themselves, and from their point of view, your only excuse for existence is your ability to improve their lives...” Michael Hammer

Your tribal government, business, department and program operate in an ecosystem. What you do (or don't do) impacts those around you. Those impacted by your actions are referred to as stakeholders.

Definition: A stakeholder is anyone who has a stake in your organization.

To quickly identify your stakeholders, ask yourself, “If my department was to disappear tomorrow, who would be impacted? Typical stakeholders and their needs would include:

STAKEHOLDERS	SAMPLE NEEDS
Tribal Members	Services, Safety, Healthcare, Respectful Treatment, Information
Tribal Leaders	Information, Informed Recommendations, Responsiveness
Funders	Information, Follow-through on commitments, Timely reporting, partnerships
Employees	Fair compensation, opportunities, respectful treatment, advancement, sense of pride in work

Each of these groups has distinct and sometimes conflicting needs that they expect your organization to meet. To meet stakeholder needs, *you must first understand* what those needs are. It is the responsibility of tribal programs and departments to continually improve the services they provide. The starting point is to always **diagnose needs before prescribing solutions**. Some of the best methods to gather data and improve understanding of their needs are:

- Focus groups – allows for exploration of topics and more dynamic feedback from a stakeholder group
- Community meetings – collect broad-based input in an efficient manner
- Informal discussions – works especially well when fewer stakeholders are involved
- Surveys (very efficient but can be challenging to collect responses)

To view a sample of an online stakeholder assessment used to assess the needs of Elders, click [here](#).

P.E.S.T. Analysis

We live in a dynamic world where policy, culture and funding are constantly changing. One tribal housing director recently modeled good environmental analysis for her board and staff. Budget cuts at the national level seemed to be inevitable although the timing and amount of the cuts were uncertain. The Tribal Housing Director assembled her staff and identified different scenarios representing the future based on the severity of the cuts. The staff then developed responses for each scenario. When scenario B became the reality, the Tribal Housing Director and staff implemented their plan B response effectively and moved forward without a crisis.

A good strategic leader is constantly looking towards the horizon to:

1. Understand environmental changes that are likely to occur
2. Develop a strategic response to those changes in a way that protects and strengthens the community.

The **P.E.S.T. Analysis** is a structured method to look at significant elements in the environment, analyze their significance and develop a strategic response to threats and opportunities. P.E.S.T. stands for political, economic, social and technology.

To conduct a P.E.S.T. Analysis, follow these steps:

1. Brainstorm potential changes in each of these four areas. (review sample questions below)
2. Prioritize the top two or three changes that have the greatest potential impact on your services – example, ‘Social – more grandparents are raising their grandchildren.’ What are the implications for your service delivery?
3. Brainstorm opportunities that may arise from these changes.
4. Brainstorm threats or issues that could be caused by these changes.
5. Your Strategic Response - identify potential actions you can take to mitigate risk and take advantage of opportunities. (see template below)

P.E.S.T. CATEGORIES	YOUR STRATEGIC RESPONSE
POLITICAL When is the next tribal, state, or national election? How could this change government and/or regional policy? Who are the most likely contenders for power? What are their views on other policies that affect your organization? Could any pending legislation or taxation change affect your organization, either positively or negatively?	
ECONOMIC How stable is the current economy? Is the economy growing, stagnating, or declining? Are customers' levels of disposable income rising or falling? How is this likely to change in the next few years? What is the unemployment rate?	
SOCIAL What is the population's growth rate and age profile? How is this likely to change in the future? Are generational shifts in attitudes and expectations likely to affect what you're doing? What are your society's levels of health, education, and social mobility? How are these changing, and what impact does this have?	
TECHNOLOGY What technology can help us enhance our services and improve our internal processes? What technologies can help us improve internal and external communication and collaboration?	

Action Planning

An assessment on the shelf (AOTS) is no more valuable than a plan on the shelf (POTS). These P.E.S.T and stakeholder analyses are not complete until your review the data and incorporate your strategic response *into your strategic plan*. After you complete the stakeholder analysis, we recommend identifying specific actions and strategies to address any gaps between their expectations and the result you are currently providing. For example, if a tribal council is getting overwhelmed with reports, you might move to a one page memo format with manager recommendations. The action plan would look like this. This format is used extensively in the development of an ActionStrategy as it includes essential element such as action (what are we going to do), ownership (who is responsible), resources (who can help) and timelines.

ABC	Action	Owner	Resources	Time
A	Tribal council reports submitted in one-page memo format	Dept. Managers	HR	Sept. 15

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STRATEGIC THINKING: 3. Analyze Organizational Capacity

Setting goals that your organization doesn't have the ability to achieve is **wishful thinking**. Step Three in the STRATEGIC THINKING process is to assess your organization's capacity to implement your strategies. A good strategist is able to evaluate the organization's capacity to implement the strategies that are developed. For example, your 2015 plan may require skillful grant applications and project management. You have to address these capacity questions:

- Do we have the capacity to successfully apply for grants?
- Do we have the capacity to manage grants?
- Does our staff have the experience, training and tools to manage projects effectively?

To get a sense for your organization's general capacity for effective planning and implementation, please answer the following question: (1-strongly disagree, 6-strongly agree)

ORGANIZATIONAL CAPACITY ASSESSMENT: Our Organization, Department or Program...	SCORE
1. Has a high level of trust within and between of our departments	1 2 3 4 5 6
2. Has a compelling purpose – People care about what they do	1 2 3 4 5 6
3. Has clear goals and strategies	1 2 3 4 5 6
4. Stakeholders – We understand the needs of our community	1 2 3 4 5 6
5. Has the skills and experience to do their jobs	1 2 3 4 5 6
6. Collaborates effectively	1 2 3 4 5 6
7. Has the grant and project management skills to implement our plans	1 2 3 4 5 6
8. Holds each other accountable for doing the work needed for strategy execution	1 2 3 4 5 6
9. Has allocated the time, staff and financial resources to implement our strategy	1 2 3 4 5 6

Action Planning

After you complete your organizational capacity analysis, we recommend identifying specific actions and strategies to build upon strengths and address any gaps. For example, if your score was low for question #8, you would brainstorm ways to improve your capacity in that area and select the actions you believe will have the most impact.

ABC	Action	Owner	Resources	Time
A	Start grant kickoff meetings with key stakeholders	Program. Mgt.	Acct., Compliance	Sept. 15

IMPORTANT! These action plans flow into your ActionStrategy as part of your implementation plan

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STRATEGIC PLANNING: 4. Develop a Compelling Purpose – Mission, Vision and Values

“Apache’s serving Apaches” – San Carlos Apache Education Mission

Apache’s serving Apaches is one aspect of the San Carlos Apache Education Department mission. What does that look like in reality? As they are expanding their health services, they have made a concerted effort to train health professionals within the tribal ranks. They are a great example of an organization ‘operationalizing’ its mission. Mark Brown wrote, “One of the keys to a good organizational plan is that everyone understands the organization’s vision of where it wants to be in the future. Whereas a mission statement is present focused and defines the organization’s objectives, a vision statement is future focused and defines the organizations goals for the next 3 to 10 years.”

While the mission is generally stable, the vision can change depending on changes in the environment and organizational circumstances. A good organization will revisit the vision at a minimum of once a year. Vision is important because everyone needs to be able to ‘see’ your future state. Discuss questions such as - what does our future look like? How do we know we have achieved our goals? The best way to accomplish this is to create measureable goals that define success. For example;

“Employment and Training, with our partners, will help 50 tribal members find long-term employment averaging \$17.50/hr.”

Your ActionStrategy then becomes a description of what (the vision) and how (strategy/strategy drivers) you will do this as an organization, department or team.

The Power of Traditional Values

Value statements list the principles and ethics that guide the behaviors and decisions of the organization. These values then become the definition of your desired organizational culture. Value statements are particularly powerful when grounded in the traditional values of the communities. There are common values across many Alaska Native and Native American communities that have been instrumental in survival and flourishing for millennium. These values include:

- Reverence for the Creator
- Respect for ancestors, elders, other and the community
- Respectful listening and speaking
- Stewardship of land, water air and families
- Fatherhood and motherhood are sacred
- Courage and Harmony

Most tribal organizations have a list of values that are formally stated. However, you can determine what the real values are of your organization by observing:

- How do staff members treat one another and other tribal members
- How they spend their time
- How they invest their resources

THE VALUES TEST

Regardless of what is on the value statement, if tribal members are not treated respectfully when receiving service – the real value is not respect. Values are **revealed** by the actions of most people most of the time. Once you have determined guiding values, ask yourselves the question:

“If the people in our organization lived these values consistently – what would be different?”

One of the most powerful processes we have seen is when groups of leaders confront this question. Leaders, with humility and courage, will seek misalignments between **what they say they value** and **what they do**. They then identify specific ways to address the misalignments. These changes should be documented in the strategic plan as part of the ‘cultural drivers’ of change.

A. STRATEGIC THINKING	B. STRATEGIC PLANNING	C. STRATEGY IMPLEMENTATION
<ul style="list-style-type: none"> ✓ Ask Strategic Questions ✓ Analyze your Environment ✓ Analyze Org. Capacity 	<ul style="list-style-type: none"> ✓ Compelling Purpose – M/V/V 5 Focus on SMART Goals 6 Align Strategic Drivers 	<ul style="list-style-type: none"> 7 Project and Grant Management 8 ActionStrategy Plan Reviews

STRATEGIC PLANNING: 5. Focus on SMART Goals

A TRIBAL PLANNING FRAMEWORK

One method for streamlining the planning process is to develop a planning framework - a structure to organize your goals and strategies. This framework is often a list of the high level roles, functions or programs that are a part of a department or division. Here are examples of two approaches:

Hualapua Tribe Public Works

This public works department has organized their plan by functional areas or categories such as **1.0 Administration**, **4.0 Road Maintenance**, etc. Their goals and key projects are then listed and prioritized within each category.

The screenshot shows the 'HUALAPAI TRIBE' Strategy tool interface. The user is Phillip Wisely, Public Services Director. The main content area displays a list of functional areas under the heading 'Strategies / Projects / Tasks':

Strategies / Projects / Tasks	Owner	Resource	End Date	%
1.0 ADMINISTRATION				
2.0 PLANNING/PROJECTS				
3.0 NEW HOMEOWNER WATER AND SEWER				
4.0 ROAD MAINTENANCE				
5.0 BUILDING MAINTENANCE				

Nez Perce Tribe Education Department

In this example, the managers identify their key stakeholders (by stage of life) then add a goal narrative or high level vision statement. **Ex. 1.0 EDUCATION: PRE-K: Laying the foundation with a solid early childhood education**. Notice that the goals, projects and key work plans are listed within the framework with the appropriate owner and timeline.

The screenshot shows the 'Nez Perce Tribe' Strategy tool interface. The user is Joyce McFarland, Department Manager. The main content area displays a list of goals/objectives/activities:

Goals/Objectives/Activities	Owner	Performance Standard	End Date	%
1.0 EDUCATION: PRE-K- Laying the foundation with a solid early childhood education				
1.1 ECDP: Provide a safe, quality, developmentally appropriate, integrated and cultural learning environment for young children and their families. (McFarland)	Jenny Oatman		6/30/2016	
1.1.1 Program Design and Management Review	Program Staff		6/30/2016	
1.1.2 School Readiness	Program Staff		6/30/2016	
1.1.3 Nez Perce Language and Culture	Program Staff		6/30/2016	
1.1.4 Obesity prevention / education	Program Staff		6/30/2016	
1.1.5 Staff Professional Development, Recruitment, and Retention	Program Staff		6/30/2016	
2.0 EDUCATION: K-12 - Growing in knowledge and skills to find one's purpose and strengths				
3.0 EDUCATION: POST-SECONDARY- Continuing lifelong learning and pursuing career pathways				
4.0 ADMINISTRATION - Providing support to improve capacity and coordination of tribal education services				

GOALS ARE NOT STRATEGIES

There is often conflict about the terminology used in planning. We find it helpful to keep things as simple as possible. Below is an illustration of the key differences between goals and strategies:

GOAL – What you want to have happen (measurable)	STRATEGY <i>Actions</i> that you predict will help you accomplish your goal or objectives
Win the basketball game	<ul style="list-style-type: none"> - Full court press to take advantage of our team speed - Zone defense with heavy pressure on their top scorer - Exploit mismatch with our 6’4” senior center and their 6’1” freshman center
25 Tribal Clients are employed by Dec. 31	<ul style="list-style-type: none"> - Monthly collaboration meetings with TERO, Adult Education, Employment & Training, Community College - Develop policy to improve participation in job training - Improve process for tracking clients in the system - Provide twelve classes for energy industry jobs

“You cannot manage what you cannot describe.”

A SMART goal is clear about what the desired outcomes are – ex. increased employment, new clinic within budget, # of acres under weed management. SMART Goals are **Specific, Measurable, Define Accountability, Resources** and **Timelines**. Let’s illustrate further. If you are the administrator and a department manager brought the following goals to you, which one would have a greater likelihood of getting accomplished?

UNCLEAR GOAL: Increase economic development through improved collaboration with key stakeholders

SMART GOAL:

Specific, Measurable: Attract one new company in the healthcare industry that produces 15 jobs (\$46,000/yr.)
 Accountability: Sam Washakie, Economic Development Manager
 Resource: CEDS Committee
 Timeline: July 2017

The second example has the key elements of a SMART goal. Specifically, it is:

Specific: It is clear regarding the outcomes.
 Measurable: How many companies? How many jobs? Salary? Measurable components let you know you are successful.
 Accountability: Who is responsible for the goal? No accountability = no strategy implementation.
 Resources: Who or what will we draw upon to ensure success?
 Timelines: With no timeline, there is no sense of urgency. Timelines focus thinking and energy.

SUMMARY

An ActionStrategy comprises of a set of prioritized SMART goals aligned with mission, values and your vision. This plan is also informed by your **Strategic Thinking** efforts and represents the choices leaders make among various options. It also lists the strategy drivers that you predict will help you accomplish your goals.

STRATEGIC PLANNING: 6. Aligning Strategic Drivers

Eventually, all grand strategies evolve into work. -Peter Drucker

Plans do not create results, work does. Below are five types of disciplines that are generally key to your plan implementation. An ActionStrategy contains a mix of these drivers with the majority being project oriented. Most plans will contain a heavy portfolio of projects (60%-80%), process improvement initiatives, policy development and organizational design (structures, systems.) Culture is an overarching driving force and can ensure success or undermine your best efforts. For example, if the overall culture is one of ‘it’s not my job’, it will be very difficult to introduce new services or implement a new project that requires a great effort to complete.

Five Strategy Drivers:

Projects	Process Improvement	Organizational Design	Policy	Culture
A project is a temporary activity designed to produce a unique product, service or result. A project has a starting point and an end point.	Process improvement is a strategic approach to improve a process or service. It begins with identifying ‘as is’ process steps then redesigns according to the desired outcomes.	Organizational design is a methodology for aligning work flow, structures and systems with your desired services.	Developing policy is an activity that involves research, analysis and information synthesis to produce recommendation that are fair, consistent and easily communicated.	Culture is what most of the people do most of the time. It is the collective behavior of the organization. Drivers include training, coaching, rewards and performance management.

These drivers can also be expressed as SMART strategies. Look at how each could be incorporated into an ActionStrategy:

	Strategies/Project /Tasks	Owner	Resources	Time
1.0	ADMINISTRATION			
1.1	(Project) Conduct community feedback session with 100 participants	E. Begay	HR	Sept. 1
1.2	(Process Improvement) Reduce avg. hiring time from nine weeks to four weeks	A.Washakie	HR	Nov. 15
1.3	(Org. Design) Restructure the Natural Resources Dept. with Director and Program Managers	E. Begay	Tribal Council	Jan. 1
1.4	(Policy) Revise employee leave policy	A.Washakie	HR/Legal	Nov. 1
1.5	(Culture) Training managers to implement new coaching and performance management system	B.Nissen	HR/Training	Oct. 7

Each of these drivers need to align with the goal they are intended to help accomplish. This also signals to leaders and staff, what ‘strategic’ activities they should spend their time on.

“Without clear leadership that aligned each activity and every project investment to the espoused strategy, individuals will use other decisions rules in choosing what to work on: first in, first out, last in, first out, loudest demand; squeakiest wheel, boss’s whim, least risk, easiest, best guess as to what the organization needs; most likely to lead to raises and promotion; most politically correct; wild guess.”

—“Executing Your Strategy”, Morgan, Levitt and Malek

There are volumes writing about these drivers and disciplines. We have created links in our ActionStrategy **Tools** section to descriptions and best practices for each of these drivers. Click [here](#) to request access to these tools.

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STRATEGY IMPLEMENTATION: 8. Project and Grant Planning

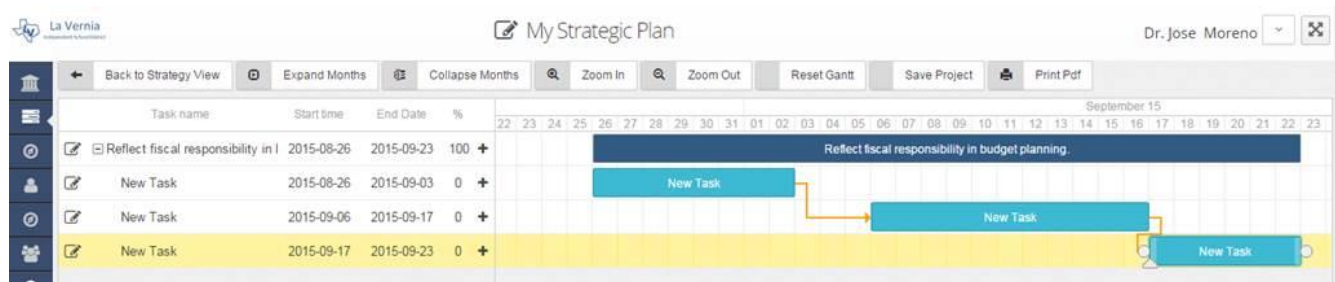
“For the espoused strategy to become a reality, it must be converted into packets of work called projects. Projects are the temporary initiatives that companies put into place alongside their ongoing operations to achieve specific goals.” – “Executing Your Strategy,” by Morgan, Levitt and Malek

The most common strategic driver is project management. The project is the true traction point for strategy execution. Grant work plans are a form of a project plan. Proper planning, from the beginning, is necessary for a project to run successfully and efficiently. Execution of your plan can be more easily implemented when you develop specific projects **within your plan** that allow for your organization to follow progress easily.

“Tribes are often tempted to “chase grants” due to the great demand for services; however, if we take time to assess and establish a system to manage our current grants and programs, then, we can strategically move forward with more focus and success. Next, once you are able to define the grant goals and an objective, reporting requirements, etc., then accountability becomes manageable, this was made possible through Action Strategy. As the Tribal Executive Director the project management tool enabled me to monitor projects and successful milestones to share with the Tribal Council.” – Darlene Lee, Former Tribal Executive Director

There are hundreds of books written about project and grant management. For the purpose of this guide, we are staying at a high level description of projects and where they fit within a strategic plan. For a more detailed outline of the project initiation process and planning templates, please click [here](#) to request the ActionStrategy Project Toolkit. It will include information about tools such as gantt charts used for visualizing project timelines.

SAMPLE GANTT CHART



An ActionStrategy can help your organization develop more precise budgets and accountability tools that increase the efficiency of current grants and also increase the possibility of being awarded more grants in the future. Government, private foundations, and non-government agencies will look more favorable at your grant proposal when your organization can provide more detailed accountability, project management, and systematic plan reviews.

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STRATEGY IMPLEMENTATION: 9. ActionStrategy Plan Reviews

*“As a leader, you get the behaviors that you **model** and **tolerate**.”*

Herold J. Hudson is a former Tribal Administrator, Operations Manager for the US Army and student at the Army War College. When asked what part of the process was the most challenging, he indicated the plan reviews/accountability sessions. Once the Tribal Council and management team had developed and approved the plan, the key leverage point for implementation was the weekly plan reviews. Before the meeting, he would create an agenda that listed which strategies, projects and grants they would review. He would then project the plan on a screen for everyone to see while the project owner would lead the discussion on plan progress.

Sometimes the conversation would go like this:

Tribal Administrator: “I see that you have that project at 20% but your due date is in 2 weeks.”

Manager: “Yes, we are behind on that. We need to add some resources.” (And maybe add some excuses)

Tribal Administrator: “It looks like it is very important that we meet that deadline - what can we help with?”

Since many managers were accustomed to planning sessions where nothing really changed, this process came as a surprise. The unspoken thought is, “Oh, so you are serious about this strategic plan.” Herold made it clear that there would be follow through and the same accountability questions would be asked at the next meeting. The management team’s ‘culture’ began to change and their ability to execute their strategy increased dramatically.

“The results were a new cultural resource department, a new mental health outreach office, a youth leadership program, and a new medical clinic all planned, funded and operational within 12 months. New budgeting disciplines were implemented increasing cash reserves significantly. Cell phone usage and technology needs were analyzed resulting in huge annual cost savings. The ActionStrategy project tool became our working strategic plan and provided us a common picture that Council members, Department Directors and Employees could access from anywhere to update and monitor progress. This is what kept us focused on what was important. This process also led to our first ever community planning session with tribal leaders, city leaders, school leaders, federal agencies, business leaders and local residents. I wholeheartedly recommend the ActionStrategy system. The return on investment was phenomenal!”

-Herold Hudson

The Plan Review Meeting Agenda template is a tool for leaders to develop focused meetings where accountability and strategic action are the norms. As you prepare for the meeting, pay especial attention to the Effective Meeting Checklist:

ACTIONSTRATEGY PLAN REVIEW MEETING AGENDA (Sample)

DATE:

TIME:

LOCATION:

PARTICIPANT PREPARATION:

EFFECTIVE MEETING CHECKLIST

- ✓ Clear purpose and agenda (could this have been accomplished without meeting?)
- ✓ Right people are participating
- ✓ People are prepared to report on last meetings assignments
- ✓ Will the discussions and decisions further our strategic priorities?
- ✓ Each participant should have some system for recording notes and their assignments

AGENDA ITEMS – *Review Your ActionStrategy to determine goals/strategies to develop agenda*

- Review Performance Metrics
- Project A
- Progress Report – Process Improvement B
- Progress Report – Policy Development

ACTION PLAN

Action	Owner	Resources	Timelines

STRATEGIC THINKING	STRATEGIC PLANNING	STRATEGY IMPLEMENTATION
<ul style="list-style-type: none"> ✓ Ask Strategic Questions ✓ Analyze your Environment ✓ Analyze Org. Capacity 	<ul style="list-style-type: none"> ✓ Compelling Purpose – M/V/V ✓ Focus on SMART Goals ✓ Align Strategic Drivers 	<ul style="list-style-type: none"> ✓ Project and Grant Management ✓ <i>ActionStrategy Plan Reviews</i>

THE FINISH LINE

Once your plan has been completed and approved by the appropriate governing bodies, you will continue to review and adjust your plan on a continual basis. As a practice, we recommend a formal plan review either monthly or quarterly. The more consistent your review process is, the easier it is to establish a cultural norm of accountability. Another reason for constant review is that ***we often learn more by implementing our plan than by developing our plan.*** Unforeseen issues, barriers and opportunities are often only visible once we have begun the journey.

For over 15 years, it has been our privilege to work with and learn from many remarkable tribal leaders. Our mission is to help tribal leaders improve their leadership and planning methods. We are eager to share what we have learned and hope to support your leadership and planning efforts as you serve your communities. If you would like more information about developing a robust ActionStrategy, click [here](#) and request a free 25 minute consultation.