STRATEGIC PLANNING FRAMEWORK
FOR CHAMBERS OF COMMERCE
BUT FIRST... A LITTLE BACKGROUND

We appreciate you downloading our Strategic Planning Framework for Chambers of Commerce.

Please allow me to introduce who we are...

We are the founders of the 9,736 member Chamber Professionals Community. Click here to access the group. It's free. Join in on the industry discussions.

We are former chamber executives focused on helping chamber professionals get the industry knowledge, training, and connections they need to be successful (and make their chambers successful).

Ways we serve you...

Frank consults with chambers and coaches Chamber Pros. He is a long-time faculty member for Institute (IOM), has written 3 books and has created numerous resources for chambers.

Norma teaches social media strategies, image creation, and creative marketing. She is a photographer and graphic designer.

We both speak at chamber industry conferences and at Chamber events. We are graduates of the Western Association of Chamber Executives (WACE) Chamber Academy program.

And something people find interesting about us...

We travel full-time in our 5th wheel RV (with Trixie and Cooper), chamber to chamber, state to state, province to province.

We have been on the road for 7 years.
If you’re reading this Guide, you obviously understand that a strategic plan is essential for your chamber but you likely aren’t exactly sure how to go about creating it. Or maybe you have one but are questioning its effectiveness or whether it is in line with what your chamber is becoming. Perhaps your chamber has gone through a lot of changes, but your strategic plan has yet to catch up.

That’s okay.

Think of this document as a check-up into the health of your existing plan (if you have one) and your chamber. If you don’t have a strategic plan, you’re not alone. We estimate that 30-40% of chambers either don’t have a plan or don’t have an effective one.

A strategic plan is essential to the health of your chamber and this document will help you put one together.

Sections

1. **Obstacles to a Strategic Plan and How to Overcome Them**
2. **Why Strategic Planning Is Essential**
3. **How to Implement Strategic Planning in Your Chamber: Step-by-Step**
4. **Components of a Successful Strategic Planning Session**

As a bonus at the end, we have a strategic planning sheet and checklist to help you coordinate the moving parts.
OBSTACLES TO A STRATEGIC PLAN

There are many reasons a chamber may not have a strategic plan, but these excuses must be overcome. A strategic plan is not something nice to have. It is a necessity. If you’re hearing (or experiencing) any of the following, you need to move past the hesitation and do it for the betterment of your chamber.

**Excuse:** “I don’t know how to create one.”

**Solution:** This document will walk you through the process.

**Excuse:** “I kinda like to do my own thing.”

**Solution:** Your board is charged with fiduciary responsibilities for the organization. It’s not an option for them to delegate their responsibilities to staff or to ignore their legal duties.

**Excuse:** “Plans are for people who have extra time. When I have time…”

**Solution:** There will never be an ideal time when you have nothing to do. Set aside a day or two for your strategic planning session and a few hours to write it up and get it approved.

**Excuse:** “We’ve survived years without one. We’re doing just fine.”

**Solution:** Today’s world is not the same as it was a half century or even a decade ago. Just because you have been “fine,” doesn’t mean that will continue. Be proactive. Create your plan so you have a definitive idea of where you are going and how you’re going to get there.
Excuse: “Creating a plan means I might be assigned things I don’t know how to do. Then I will fail.”

Solution: Or you may learn new skills for your career. Plus, you’re not alone. We are here to help, as is the Chamber Pros Group on Facebook.

Excuse: “I don’t trust what these people would come up with.”

Solution: If you don’t trust your board, not having a strategic plan is not your only problem. Plus, creating a strategic plan involves everyone in the visioning and brainstorming part. You will have an opportunity to give your input in the process. Finally, you will play a major role in writing the final document. More about that in the planning section.

Excuse: “I have other things that are more important than typing out what I’m already doing.”

Solution: How do you know if those things are more important if you don’t have a plan charting your direction? You may think they are important but that may not be what is most important for the growth and success of the chamber. And what you’re doing may not be what your board thinks is important. You need a plan so you are all rowing in the same direction, know what success looks like and how it will measured.

We’re not here to cast blame. Planning is easy to overlook when you are in the thick of things. But, like driving across country, you want to pick a destination and plan your route.
WHY STRATEGIC PLANNING IS ESSENTIAL

FIDUCIARY RESPONSIBILITIES OF THE BOARD

The chamber board and each board member has a “duty of care” to the chamber. “Duty of care” is not a fancy phrase dreamed up by consultants to place importance on a topic they want to teach about. It’s a legal phrase that applies to boards.

According to ASAE, “duty of care” can be explained this way:

“This duty is broad, requiring officers and directors to exercise ordinary and reasonable care in the performance of their duties, exhibiting honesty and good faith. Officers and directors must act in a manner which they believe to be in the best interests of the association, and with such care, including reasonable inquiry, as an ordinarily prudent person in a like position would use under similar circumstances.”

Without a strategic plan, it’s difficult to believe the board is keeping up with its fiduciary responsibilities.

Without a strategic plan, it’s a free-for-all with everyone doing what they want to do or avoiding what they don’t want to do. This quickly erodes into chaos.

Takeaway: A strategic plan encapsulates the mission, vision, reality, expectations, and direction of the chamber. It will help you make decisions, guide staff, and create a budget. It is the foundation for all chamber structure and goings-on.
SETS EXPECTATIONS FOR STAFF

Imagine having a job where you did not know what is expected of you. You had no direction as to what you should prioritize. It would be impossible to know if you were doing a good job if you didn’t have any expectations laid out for you. In addition to not knowing what is expected of you, what if there was no one to go to for guidance or a review on what you had done so far?

That would make your job much more difficult and frustrating.

On the other hand, if you knew exactly what was expected and important, you could prioritize your daily activities to achieve your goals. That’s why a strategic plan is so valuable. The staff cannot satisfy the board without an agreed upon plan. The document sets expectations. You cannot have a well-run operation without one.

Takeaway: With a strategic plan, the staff knows what the board wants and what it has designated as important. The plan can be used to measure progress and make decisions on how time is best spent.
BECOMES THE FOUNDATION FOR THE BUDGET

The chamber’s strategic plan is also essential to the creation of a budget. It is impossible to know what you should spend your resources on if you don’t know where you’re going, just like planning for a personal vacation. Going to the nearby town and spending a weekend requires a different budget than going to Europe for a month. You must know where you’re going and how you’ll get there to estimate what you’ll need and how you’ll allocate it.

Takeaway: Your strategic plan tells you where you’re going and what’s needed to get there. You will use the plan to draft your budget. The budget cannot be drafted prior to the plan.

In preparing for battle, I have always found that plans are useless, but planning is indispensable.

— Dwight D. Eisenhower
HOW TO IMPLEMENT STRATEGIC PLANNING IN YOUR CHAMBER: Step-by-Step

THE IMPORTANCE OF PLANNING

There may be more resistance to planning this year than in previous ones. After all, we were hit with something that very few businesses or organizations were prepared for, plan or not. While COVID disrupted everything, it shouldn’t be used as an excuse as to why plans aren’t worth it. After this year, some have argued that there’s little point in plotting what you want to happen when something completely unpredictable can derail you from your plans. And it’s not just global pandemics that mess with plans. Sometimes a natural disaster can change what you expected would be the focus of your energy that year.

But that doesn’t mean you shouldn’t plan.

Your plan should be a living, breathing document. One of the most critical parts of the strategic plan is the planning process itself. Putting together a plan causes the chamber staff and board to take time to think about the chamber proactively.

Strategic planning requires deliberate consideration for the chamber’s future and talking through the vision everyone has for it.

Even if you end up having to deviate from the plan due to a global pandemic, a natural disaster, or something completely unexpected that rocks your chamber to the foundation, it’s very likely your main goals won’t change. What will change are the tactics you use to get there. A strategic plan can keep you on track even when that track appears to have vanished.

But how do you go about putting together a strategic plan?

It’s probably less expensive and difficult than you might think but it does require board and staff participation. The planning session will take the better part of a day, plus the write up, and voting on the final document.
Here are the steps you need to undertake to create an effective strategic plan for your chamber.

**STEP ONE: SELECT A DATE AND PLACE**

You want your board to participate in the strategy sessions with very few interruptions. That means selecting a conference room or somewhere you can gather comfortably away from your board members’ offices or businesses, preferably. Some chambers use a local hotel or retreat center to ensure as few interruptions as possible. If you have a conference room, you can use that. The key is to minimize distractions and create an atmosphere where people can interact with one another.

Advise board members that their presence is expected (mandatory) and set the date far enough in advance that they can plan to be there. You need them for the entire strategy session and that will take several hours.

**STEP TWO: BRING IN A SEASONED OUTSIDER**

It is imperative that you bring someone in from the outside to facilitate your strategic planning session. Select a seasoned professional with chamber industry knowledge, not just a non-profit professional. You want someone who understands chambers and can share benchmarks of the industry as well as experience and examples from other chambers that are a similar size and operation to yours.
You’re Not a Charity
Chambers might have the tax designation of a nonprofit, but they more closely resemble a small business, just like most of its members. A strategic planning facilitator who comes from a background focused on donors and running a charity organization will have a large learning curve into your world.

Size Matters
Additionally, if you’re a small or medium sized chamber, you’re going to want someone who can come in and be realistic about what your chamber can accomplish given your staffing levels. It’s not realistic to believe you can undertake the same things that a large metro chamber with 25-50 staff members.

New Eyes
An outsider can help as a new set of eyes as well as bring with them lessons from other areas.

An outside planner will:

- run the planning session without a conflict of interest or previous personality clash with a board member
- help with the fleshing out of the plan without a hidden agenda or personal benefit
- bring years of experience and industry knowledge
- provide chamber-specific metrics and benchmarks to ensure adequate operations
- make sure everyone’s voice is heard without giving them their way
- be above the political infighting or office politics
STRATEGIC PLANNING FACILITATORS

There are a lot more options for strategic planning facilitators than you might think. In fact, if you have very little in your budget for planning, you may find someone at your state chamber execs association or another chamber exec who can help work with you and your board in a strategy session for the cost of travel expenses.

There are also strategic plan facilitators and chamber consultants who have extensive experience working with boards of all sizes. Here are a few names to get you started:

Frank Kenny
Cathi Hight, Hight Performance Group
Patrick H. McCaughey, CPF, IOM

Take some time picking the person you want to work with. You need a facilitator who understands your world without being in your world.

When deciding about the right facilitator for you, ask about their experience and the sizes of the chambers they’ve worked with.

Then give them some background on yours and find out if they’ve worked in similar situations.
Facilitators may not be the only “outsider” you choose to bring in. There may be a person in your area who will be helpful to your planning discussion. If there’s something you know that will be part of your planning discussion because of its level of importance in your community, and there’s someone who is knowledgeable on that subject (or a critical part of the decision-making behind it), you may want to invite them in to share their knowledge or expertise on the subject with your group.

Every facilitator will have their own take on the day’s agenda, but a successful board retreat and strategic planning session will look something like this:

- Board Orientation/Training (1-2 hours)
- Visioning Session (2-3 hours depending on length of discussions)
- SWOT Analysis (2-3 hours depending on the chambers situation and length of discussions)
- Strategic Objectives (1-2 hours depending on length of discussions)

DRAFTING STEP 3: PREPARING THE AGENDA AND MAPPING OUT YOUR TIME

The facilitator can work with you to figure out an exact agenda and time required for each session. You want to hear from everyone, and you don’t want anyone to feel like their opinions were rushed or discounted. But you also want to keep everything on track. A facilitator can do that without the emotions invested in it or the drama of the individual actors.
**STEP 4: STRATEGIC PLAN HOMEWORK**

After a day of discussing the board’s and staff’s vision for the chamber, analyzing the strengths and weaknesses, opportunities and threats, and top priorities, you will come away with 3-5-7 major strategic objectives. These objectives will become the basis of the strategic plan. The chamber CEO will take the agreed upon objectives back to the office and flesh out how they will be met. This final document should only be 1-2 pages.

The draft of the strategic plan will be presented to the board and the board will vote on it or suggest changes/edits. Changes will be made, and the document will be approved. The chamber’s budget should reflect the needs of the strategic plan.

Finally, it will be up to the staff (and committees) to implement the strategic plan with the board’s high-level oversight. Each board meeting going forward should focus on at least one aspect of the plan.

Now let’s examine the Strategic Plan Strategy Session in greater detail.
COMPONENTS OF A SUCCESSFUL STRATEGIC PLANNING SESSION

We suggest the following components for an effective strategic planning session:

**Board Orientation/Training**

How to have a healthy board and chamber. Roles, responsibilities, and duties of the board and staff. Orientations are foundational to having a healthy and effective organization.

**Visioning Session**

A visioning session is the ideal way to begin your planning session because it provides everyone with the opportunity to share their vision (or what they believe is possible) for the chamber and community. A visioning session also creates buy-in for the final plan. People get excited when talking about the future and it’s a great way to energize the audience. They start thinking big.

In addition to thinking big and energizing the crowd, the visioning session illustrates the great potential and opens the participants’ eyes to being able to accomplish big things. It also provides the impetus to build upon what others have said and take ideas further. A visioning session provides the basis to encourage the board to interact with one another and see themselves as the architects of the chamber’s future. This discussion is usually one of the highlights of the board members’ tenure.

**Break**

It may seem funny to follow up a very energetic session with a break but it’s necessary for several reasons. It lets your board go on break during a high-energy time, feeling good about the direction they’re moving in. This facilitates additional conversation and interaction with one another coming from a positive frame of mind.

Additionally, for a healthy organization to do big things, you need trust. Trust comes
from relationships. It is impossible to be a strong, functioning board with a non-existent or broken relationship. Board members and staff must trust each other if they are going to do big things for the chamber and community. Building relationships with one another also gives board members insights into what each member’s strengths are and what they bring to the board. This knowledge helps with the next part that they’ll undertake after the break, which we’ll get to in the next section, SWOT analysis.

Breaking at this time gives participants a common ground and easy way to open conversation with people they may only have a friendly acquaintance with. It may also start conversation between those who may have been distant with one another in the past. A shared excitement about the chamber’s future provides good common ground from which to build.

**SWOT Analysis**

SWOT stands for strengths, weaknesses, opportunities, and threats, all of which will be analyzed in the session. A SWOT analysis can help everyone see the environment for what it is (the reality of the situation) and what the chamber can become. The SWOT conversation will help shape the chamber’s unique strategic plan.

This part of the planning session can be open to non-board members who have something vital to add to the SWOT analysis. For instance, if crime was an ongoing problem in your community, a conversation with the Chief of Police might help you better understand what the City is doing and may be a valuable part of your future planning.
Components

**Strengths.** Ask each of your board members what they believe to be the chamber’s strengths. Talk about what the staff offers as far as skills and experience are concerned. Is there money in the bank? Is the chamber partnered well? Examine what makes the community different and positioned to do amazing things. You should use this information to play to the chamber’s strengths.

*Example of a strength:* well-funded chamber bank account or supportive sponsors

**Weaknesses.** Now explore the opposite. What does the chamber struggle with? This isn’t blame time. This is merely time to point out deficiencies or potential struggles. The main reason we do this is to be prepared. Examining weaknesses may help in future recruiting for board members or staff or may create an opportunity with a member. Weaknesses that are deemed important (or possibly destructive) will have to be shored up as part of the strategic plan, which we’ll get to in the Drafting Strategic Objectives section.

*Example of a weakness:* no marketing experience on the staff, a “cliquish” reputation in the community, or a lack of representation of the entire business community on the board.
Opportunities. Next, we look at areas of the greatest potential. What is the chamber well positioned to do more of or implement? What do your members want that you could do but haven’t implemented yet?

Example of an opportunity: Many new tech businesses have started in the community. How can we leverage that to grow the chamber?

Threats. Examine what poses a potential problem to your chamber or community. What is holding you back? It could be another membership or networking organization, or it could be a local crime wave.

Example of a threat: the cost of living is skyrocketing in our area and salaries have not kept up. People are going to work in neighboring areas or moving altogether (or maybe it’s not happening yet but could become a potential threat in the future).
BREAK

After the SWOT analysis it’s a great time for a break. Again, valuable discussion occurs in session, but participants also need time to absorb and think about the SWOT discussion.

Allowing participants some downtime may also help the introverts of the crowd gather their thoughts and come back with an idea or two that they can share before starting the final session of the day.

You want to make sure everyone has time to add to SWOT as those points raised will soon become the foundation for the next step, Drafting Strategic Objectives.
DRAFTING STRATEGIC OBJECTIVES

Effective strategic plans usually contain a limited number of (about 3-5-7) strategic objectives that will be the basis of chamber decisions and actions over the next 1-3 years. To create these strategic objectives, go through the opportunities compiled in the SWOT Analysis and discuss them. Decide which ones align with your chamber’s strengths and have support of the board. You must also have the capacity to undertake them. Discuss if the weaknesses make these objectives impossible at this time. Try to play to all your strengths while shoring up your weaknesses.

When you have 3-5-7 strategic objectives (you may need to narrow down the list), you have the basis of your plan, which the CEO will draw up and the board will vote on. Since the plan came straight from the board itself then you are not guessing what the board wants you to be focused on.
FINAL STEPS IN YOUR STRATEGIC PLANNING PROCESS

SHARE YOUR STRATEGIC PLAN

Your strategic plan should be a forward-facing document. It allows your community to understand the priorities of the chamber. Share it on your website, in your newsletter, as part of your membership materials. Get creative for how you tell people what’s important to the chamber and what contributions you’re making to the community over the next few years.

When you share your plan make it visually appealing and keep the format to 1-2 pages. This is not a shareholders’ report or a detailed internal business plan. It should not be convoluted and confusing; direct and to the point is what you’re going for. Someone who knows nothing about your area should be able to see the plan and understand what the chamber is currently focused on.

CONCLUSION

The board and the chamber staff must work in conjunction to achieve their goals. However, it’s first important to mutually agree on what those goals are. A strategic plan documents those goals and ensures the health of the chamber in meeting its goals in the most efficient way possible.
STRATEGIC PLANNING SESSION
PLANNING SHEET

The following sheet can be used to track the moving parts of hosting an effective strategic plan planning session.

DATE: 

TIME: 

LOCATION: 

COST OF LOCATION: 

FACILITATOR FEE: 

ITEMS NEEDED FOR PLANNING SESSION:

☐ PENS

☐ NOTEPAD/TABLETS

☐ EASEL(S)

☐ PAPERPAD FOR EASEL

☐ MARKERS

☐ NAME PLACECARDS

☐ PHONES OR LAPTOPS

☐ PROJECTOR

☐ COFFEE/WATER

☐ FOOD/SNACKS
STRATEGIC PLANNING SESSION PLANNING SHEET

TO-DO LIST:

☐ Finalize date, time, and place for planning session.

☐ Line up facilitator.

☐ Send “save the date” e-invites to the board and anyone else you want in attendance. Communicate to board members that their attendance is essential (even mandatory).

☐ Find out what items the facilitator needs for the sessions and whether you will be booking travel, room, car.

☐ Send formal announcement/information (calling it an invitation makes it sound optional) for the planning session.

☐ Give final count to vendors (meeting host, caterer, etc.), if needed.

☐ Confirm location two weeks out.

☐ Remind participants one week out and day before.

☐ Create agenda and send to board or receive agenda from facilitator and send to attendees.

AFTER THE STRATEGIC PLANNING SESSION:

☐ Take the plan components discussed back to the office and create a 1–2-page plan with strategies and tactics.

☐ Share the draft plan with the board members for feedback.

☐ If there are changes requested, make the necessary changes.

☐ Obtain sign-off of plan through a vote of the board.

☐ Create graphics and handouts of plan so it can be easily shared and understood.

☐ Share the plan widely with your members, community, and local leaders.

☐ Use the strategic plan to build your budget. The budget supports the plan.

☐ Implement strategies and tactics on strategic plan through staff & committees.

☐ Update the board on progress and brainstorm solutions at every board meeting.
We help Chamber Professionals get the knowledge, training, and connections they need to be successful in the chamber industry.

Let's stay connected.

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