

**Organizational Planning:
Strategic Survival and Success
*Preparing to Plan***

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Raise your right hand if...

- You feel like you could articulate, right now, what your board members expect for the future of the organization
- Raise your left hand if you would *really like* to know what your board members expect for the future of the organization

My Question:

Why are you thinking about planning at this time in your organization's life?

Which Describes You?

- I want to do a strategic plan, but I'm unsure what is needed, and whether other people will buy into the idea
- I'm being pressured from someone else (Board, staff, etc.) to do a plan, but I'm unenthusiastic
- The other workshops were full!

SELECTING THE PLANNING APPROACH

Must know how much time the process will take

- Preparation
- "Live" sessions
- Documentation

Jargon Soup

- Objectives (sub-objectives, etc.)
- Goals
- Strategies
- Others?

Parts of the Process

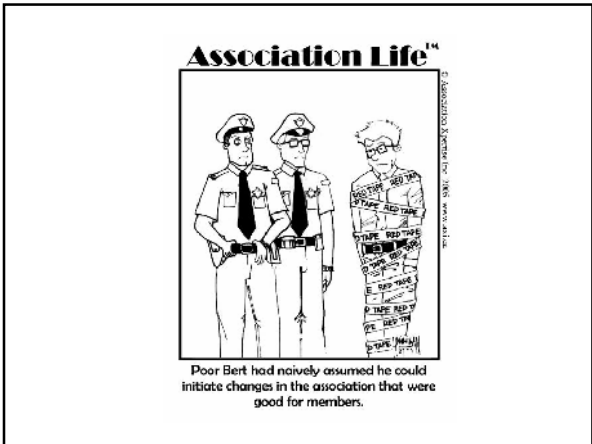
- Development or review of organizational building blocks
- Assessment of the current situation (SWOT)
- Optional: Surveys or other information gathering
- Description of desired future for the organization
- Strategic options

Process - Continued

- Selection of strategies
- Implementation: Planning action steps
- Evaluation: Measurement and tracking
- Revisiting the plan, planning for the next year
- Updating of the longer-term vision, assessment of new strategies

Other Considerations

- Methodology- Choose one!
- Make it everyone's plan
- Resistance – Anticipate and overcome
- Logistics
 - Meeting Room
 - Human Needs
 - Retreat Setting



OUTSIDE EXPERTISE VS. DO IT YOURSELF

Outside Facilitators:

- “Neutral cheerleader”
- Balances different voices
- Having money and time invested results in focused attention on the planning process
- Should feel comfortable, & supported by, the facilitator

If you don't have an outside person...

- Appoint facilitator(s) – staff, board member
- Ideally: Not the ED or Board chair

Reflect and Share

- Besides “lack of time for planning”, what are one or two major objections to doing a strategic plan that you can anticipate from your Board, staff, or others?

SELLING THE PLANNING PROCESS

- A bridge between Means and Ends
- The allocation/distribution of resources (troops) to meet goals (capture the hill)

Fundamental Questions of Existence

- Why are we here? (Organizational Mission)
- Where do we want to go? (Vision)
- How will we get there? (Strategies)
- Who and When? (Implementation)

A Strategic Plan is About....

- Assessing where you are now
- Imagining choices the organization can make
- Stating Intention and Hope about “the Future”

Rare opportunity to step back

- What strategies (implicit or explicit) are being employed now? Why did we choose those strategies?
- What alternative choices are available?
- What decisions are we going to make?

Messages to the Board

- Essential function of governance and leadership
- Guidance for day-to-day work
- Funders want it

Messages to the Staff

- Clearer direction from the Board
- Your input (especially about the assets and constraints of your programmatic or administrative functions) is important to help shape the plan

IMPLEMENTATION

- A written plan documenting the big picture and the specific steps
- Doable task items
- Flexibility to alter, drop, or carry forward items
- Deadline dates
- People responsible

IMPLEMENTATION

- Assign a person(s)—no more than 2—to coordinate the plan
- Make it a regular item on each Board agenda
- Celebrate accomplishments
- Reward performance that helps move the plan to implementation
