

## Planning to Plan

Before beginning to plan, check the organizational readiness to plan. Sometimes a dynamic leader sets the tone and does all the visioning. At other times, the culture is too divisive for good planning and it would be a waste of everyone's time. If the commitment of the board and staff to the process is lacking it can be costly and unproductive. Strategic planning is not right for every organization; the timing and procedures should be adjusted to fit your organization's level of dedication to the process and its culture.

Seek answers to the following questions:

### Organizational Motivation:

- Why are we undertaking this? Are we fully committed to the planning process and the time it takes to plan (up to 2 full-day meetings with the entire board, committee meetings plus preparatory work)?
- What are the key strategic issues facing the organization?
- How much commitment is there to undertaking this task? What is the commitment of the Board and Executive Director to the process?
- Any looming crisis? Are there any major issues that need to be resolved before we enter into a thoughtful planning process?

### Participants:

- Who is it essential to involve?
- Who should be on the planning team? Do we have 3-6 board and senior staff members willing to form a team to lead the process? Are they prepared to commit the time, work with the consultant, communicate with staff and board during the process and to lead the implementation?

### Process:

- What is our past history with planning? What should the strategic planning exercise include?
- What are the major steps in the process? Do we want an exhaustive planning process or an update of an already robust plan?
- What is our role vs. the role of the consultant?
- What process fits the organisational culture best?

### Resources:

- What level of resources will be invested in the process? Do we have the financial resources and personnel? How thinly are resources spread now?
- What are the operational results to be achieved in this process?
- What are the transition steps to operational planning?
- How long will it take?

Why should an organization create a long range, strategic plan in the first place?

1. **You become less reactive, more proactive** -- When you go through an effective strategic planning process you're forced to think ahead. As a result you begin to consider preventive and pre-emptive approaches you can only dream about while desperately trying to drain the swamp.
2. **You address critical issues** – Will your organization take e-commerce seriously? What will that mean to the services? Without the planning process, important questions like these can remain unanswered, leaving uncertainty and doubt to rule in your organization.
3. **You promote ownership** – This refers to ownership of the plan itself. Buy-in is vital in the execution of any plans or initiatives.
4. **You build your team** – Planning forces your management team (or entire organization, if practical) to come together and address challenges critical to the future of your business. Usually the planning process itself will build teamwork among those involved.
5. **You provide clear targets** – “How can you hit a target you can't see?” is a popular rhetorical question. While everyone knows the answer, few organizations work to provide crystal-clear targets of the company's direction.
6. **You provide the reasons why** – You can preach the company's goals repeatedly, but if you don't communicate the reasons why those goals are critical, you've lost them before you started. A particularly charismatic leadership can use the planning process to put the plans into commonly understood language and goals so that the staff can implement these strategic priorities.
7. **You create a key management tool** – When you can see your people taking strong, proactive steps and can hold them accountable for their short-term action commitments in supporting long-term goals, you have a better handle on your true progress.
8. **You create a key communications tool** – The written plan becomes a critical, visible tool for initiating and following through on specific activities.
9. **You can position your agency to provide the future support your clients need.** Anticipating the direction your agency needs to face to achieve the impacts that are important to your mission is vital to a healthy non-profit organization. While the words “competitive advantage” come from the for-profit sector, your competitors may be too busy to go through the same steps required for effective planning. Your investment in the process can become your service edge in the months and years to come.
10. **You show others how serious you are about your organizational goals** – When you can show your funders, associates, colleagues, suppliers and customers where you're heading and why, they're more likely to find ways to help you get there.

How ready is your organization to undertake strategic planning? For every item that is answered 3 or below on the following scale, consider some pre-work to get the organization ready to make the best use of its planning time and dollars.

<b>Rating Scale:</b>		
5= strongly agree; 4= agree, 3= neither agree, nor disagree; 2= disagree; 1 = strongly disagree		
Item	Your Rating	Possible action steps if rating is low
1. The Leadership believes that fundamental change is required.		1. Educate leadership about the threats the organization is facing
2. The Board and Management Team understand and appreciate the value of strategic planning		2. Provide examples of successful strategic planning processes
3. The organization is stable enough that senior leaders are willing to put aside time to think and reflect.		3. Identify "teachable moments" where strategic issues can be raised and discussed
4. The organization (Board and staff) is willing to commit time and energy to the planning process		4. See 1 & 2 above. Develop budgets to plan. Identify potential financial return if opportunities are seized or threats avoided
5. The organization has had positive past experiences with strategic planning		5. Review past experiences; develop plan to plan which avoids past traps.
6. There is a high level of trust within the organization at all levels, especially between Board and ED.		6. Spend extra time developing ground rules and answering questions of various constituencies; acknowledge past problems
7. There is a high level of trust between the Executive Director and employees		7. See 6 above; show employees how they will be involved in the process.
8. The organization has or is willing to acquire the technical expertise to develop and carry out an effective planning process		8. Identify training needs; send core planners to workshops or courses to develop necessary skills and knowledge as part of the process
9. There is a high level of skill in managing meetings, problem-solving, and creative thinking in the organization.		9. See 8 above. Use strategic planning process as a means of upgrading organization's skills. Create special ground rules for strategic planning groups to incorporate facilitation and meeting management skills and knowledge.
10. There is someone with clout who will "champion" the strategic planning process.		10. See 1&2 above; recruit the champion.