

Why Plan?

...and, by the way, what planning really is.

The purpose of planning is not to write a plan. It is to increase your ability to serve your mission. The several different kinds of planning—notably strategic, program, business and facility planning—each with its own purview and approach, share some basic principles. The discussion below is framed to convey the many benefits of strategic planning. With some adjustments of who is involved (professional staff or faculty, rather than all stakeholders), most points apply to program planning as well.

Organizations plan for a number of reasons. Many of them sound as if they would best be done reflectively, in quiet times:

- a new organization may need to articulate and agree on purpose and means
- a mature organization might need to
 - find new challenges
 - shake complacency
 - invigorate stakeholders
 - move to the next level
- a challenged organization might need to solve a problem of direction, consensus, or funding

In challenging times, when strained resources appear to require a choice between cutting programs or cutting staff, strategic planning can seem to be pretty far down the list of priorities. However, planning is not a luxury that is best sacrificed when stresses and strains mount. It can be exactly what is needed to illuminate a path through difficult times.

Here are 12 good reasons to launch a strategic planning process:

Circumstance

1. Change happens. If you don't take the time to step back and re-evaluate when conditions have changed substantially, when will you?

Operations

2. The essence of nonprofit planning is to develop consensus around the pursuit of mission. Good ideas that are outside the scope of organizational strategy constitute mission creep. Once the leadership has listened to all points of view and settled on a direction, everyone can focus their efforts to support the chosen course of action and dismiss distractions that limit the ability to serve the organization's mission.

3. With a clear focus, there will be a standard for establishing metrics of performance toward strategic goals. Progress can be tracked and individual actions can be evaluated. Individual initiative can be engaged by mobilizing all stakeholders to suggest their own (measurable) action items. Such empowerment can result in an enormous burst of productive energy that can make a critical difference in the organization's ability to thrive.

Wisdom

4. H.L. Mencken said that "for every complex problem there is a simple solution... and it is always wrong." The simple solution of doing less of the same—or taking other ostensibly obvious steps—in times of heightened need may not be the best approach to serving an organization's mission. A good strategic planning process moves everyone out of their comfort zones, to challenge their own assumptions and to find better strategies to support the organization's mission.

5. In the face of a complex situation, the combined perspectives and experience of many minds is likely to identify opportunities and suggest nuances that any one decider would miss.

Cultivation

6. Drawing on the entire stakeholder community to help shape the response to a challenge offers another benefit: the process itself brings people together, developing a sense of inclusion and communal purpose. Stakeholders who are consulted for their ideas will, through that very act of inclusion, feel a stronger sense of connection to and enthusiasm for the organization. This holds true at every level of involvement, bringing many people at least a little closer into the fold.

7. As fundraising continues to get more competitive, the ability to make a compelling case with prospective donors is even more important than ever. Donors can only be involved in so many causes. A newly refreshed strategy that takes changing conditions into account and maps out measurable actions to get to a goal can be a powerful tool of persuasion.

Organizational Development

8. By being brought together and familiarizing themselves with the critical issues, board, staff, volunteers and other stakeholders develop a new understanding of the organization and their roles within it.

9. A nonprofit board has been defined wryly as an ineffective group of effective people. Planning develops more informed, engaged and effective board members, better able to engage their skills and wisdom.

10. There is no better leadership development for trustees than close involvement in a strategic planning process. Often chairing the planning committee is a natural steppingstone to chairing the board.

11. A good planning process stimulates all participants to think strategically, an experience that can be cultivated into a habitual practice.

Aspiration

12. Excellence takes work. As a powerful, multifaceted tool for self-examination and improvement, strategic planning can help you to do your best to serve your mission.

A common criticism of strategic planning is that you can't really know what conditions will be in three to five years. That view misses the point. The twelve reasons listed above are about the *present*, not the future.

An effective mission-based strategy needs to have long term goals. But the actions prescribed in a multi-year plan should be fluid. They need to be monitored and reevaluated along the way. An effective planning process does not conclude with approval of a written plan; it remains a living process that refuels itself on the strategic thinking developed, nurtured, and exercised in the initial stages.

The twelve reasons above suggest that whatever may have brought you to planning, a well-conceived and executed process will provide many additional benefits.

There is no one right way to pursue strategy and planning. The specific approach that will work for an organization—and what aspect of the planning process

should be emphasized—depends upon such considerations as:

- the nature of the organization (many or few constituencies; how large, engaged, and dispersed they are; size and culture of staff; role of the governing board)
- the prior planning experience of staff and board
- the life-cycle stage of the organization (new, thriving, stalled, troubled)
- the nature of the changes it is facing—or creating

For a description of the distinctions between strategic planning and other kinds of planning, or more detail about any of these ideas, see the resources listed below, or contact us.

Planning for yourself?

We're happy to offer as much (or as little) advice or guidance as you need. Use our experience to assure your success.

Contact Sam Frank to discuss the possibilities.

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Resources

Other Critical Issues

- CI 2: *The Secret Life of Surveys* (<http://bit.ly/SyPci02>)
- CI 4: On Boards (<http://bit.ly/SyPci04>)
- CI 5: The Structure of Planning (<http://bit.ly/SyPci05>)
- CI 6: Financial Modeling (<http://bit.ly/SyPci06>)
- CI 7: On Mission (<http://bit.ly/SyPci07>)
- CI 8: The Measure of Success (<http://bit.ly/SyPci08>)
- CI 9: Brand Identity (<http://bit.ly/SyPci09>)
- CI 10: Mind Your RFPs & Qs (<http://bit.ly/SyPci10>)
- CI 11: Integrated Planning (<http://bit.ly/SyPci11>)
- CI 12: Business Planning (<http://bit.ly/SyPci12>)
- CI 13: Facility Planning (<http://bit.ly/SyPci13>)
- CI 14: Managing Change (<http://bit.ly/SyPci14>)
- CI 15: Strategic Action (<http://bit.ly/SyPci15>)

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