

**Twelve reasons why planning is
more critical in challenging times.
...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—most prominently 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 in challenging times. With some adjustments of who is involved (professional staff or faculty, rather than all stakeholders), most points apply to program planning as well.

In challenging times organizations have to find ways to cut back wherever possible and forgo discretionary expenditures, not only of cash, but also of time and energy. The problem, of course, is to determine what to eliminate and what to protect.

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

When strained resources are about 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.

Notwithstanding these usual intentions, the *real* reasons to plan are even more pressing during periods of impending crisis. Here's why:

Circumstance

1. If you don't take the time to step back and re-evaluate when conditions change, when will you?

Wisdom

2. 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.

3. In the face of a complex situation, the combined experience of many minds is likely to identify options and suggest nuances that any one decider would miss. Looking at a situation from a variety of perspectives is more likely to flag the truly critical issues and to find the new opportunities in them, as well as the challenges.

4. Challenging times provide an opportunity through a good strategic planning process to move everyone out of their comfort zones, to challenge their own assumptions and to find better strategies to support the organization's mission. This will produce a benefit that will last well beyond the precipitating crisis.

Cultivation

5. 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.

6. When tough times make fundraising even more competitive than usual, 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 can be a powerful tool of persuasion.

Organizational Development

7. A nonprofit board has been defined wryly as an ineffective group of effective people. Planning develops better informed, more engaged and more effective board members, better able to engage their skills and wisdom to address a challenge—as well as identifying and training a new generation of leadership for ongoing strength.

8. By being forced to work together and familiarize 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 good planning process in challenging times stimulates all participants to think strategically, an experience that can be cultivated into a habitual practice.

Operations

10. Once a broad group has described some possible options, and the responsible leadership has settled on a direction, everyone can focus their efforts to support the chosen course of action and dismiss distractions—all the more important in tough times

11. With a clear focus, there will be a standard for evaluating individual actions. Measurement is all the more urgent when resources are tight—and when changes are made.

12. Once mission-based goals and objectives have been set, individual initiative can be engaged by mobilizing all stakeholders to develop 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.

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 the silver lining of a crisis is that it can force an organization to focus strategically on practices that will continue to pay off well after the crisis is past.

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, and how large, engaged, and dispersed they are; size and nature of staff; role of the governing board)
- the prior planning experience of staff and governing board
- the life-cycle stage of the organization (new, thriving, stalled, troubled)
- and 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.

Resources

Critical Issues archive: <http://bit.ly/SyParchive>

Other articles, or subscribe to Critical Issues:

www.synthesispartnership.com

Blog: <http://bit.ly/blogSyP>

Wednesday Webinars: <http://bit.ly/SyPwebinars>

The Wednesday Webinar series features two free professional development presentations for nonprofits weekly, offered by experts in nonprofit governance, planning, management, finance, fundraising, marketing, human resources, and organizational development. The webinars are presented at

1:00 Eastern / 10:00 Pacific

2:30 Eastern / 11:30 Pacific.

© Copyright 2010 Synthesis Partnership

All rights reserved.

Complete and fully attributed copies may be made and shared.