

Fear & Loathing of Strategic Planning

There has been a lot of talk in recent years about the death of strategic planning—that conditions and opportunities are in such flux today that in the time it takes to develop a five year plan it will become obsolete. Or that the process itself will delay critical decisions. And if those arguments aren't enough, nonprofit leaders often worry that once the plan has been created, implementation will be a burden and a distraction from the 'regular' work that will still need to be done.

These concerns are not entirely without merit, but when they are accepted at face value rather than taken as challenges to be met, they can erode the underpinnings of sustainability. To understand how, we'll have to unpack the embedded assumptions about the nature, purposes, structure and processes of strategic planning.

Time Frame

The first problem, that strategic planning will delay decisions during planning, and be obsolete well within its three-to five-year time frame, is rather easy to address.

First, operations go on during a strategic planning process. The organization doesn't get put on hold. The job of the planning process is to move as quickly as it can to produce decision support that will better position the organization.

Second, strategic planning is not about predicting the future. It is about understanding the present and building organizational strength to meet the future. As we noted in Critical Issues # 1, Why Plan? (<http://bit.ly/SyPci01>), the planning process itself offers enormous benefits for organizational development, even before a plan is drafted. The process generates strategic thinking and, in engaging stakeholders, it enhances awareness, knowledge, consensus and support.

Third, if you develop a five-year plan, you won't follow it like a printed roadmap (remember them?); you'll need to refresh it as you go (like a GPS adjusts when you take an unanticipated turn), over the course of three or four years, until you've accomplished enough of its objectives to need a new framework.

At this point you'll need to start over, which you will want to do anyway, for the benefits of re-engaging stakeholders. This should not be seen as an undue burden. If the planning process is properly designed, it will be energizing and rewarding—and different—each time, and will be the engine driving a culture of engagement and strategic thinking. Just imagine all of your stakeholders fully focused on the organization's most critical issues, and working together to address them.

If this scenario is difficult to envision, that may be because of a misconception about strategic planning.

“There is No Spoon”

Strategic planning is often presented by experts as having an unvarying set of rules—which of course differ depending on the expert. The planning process must take X months. Or it should be conducted entirely within a weekend retreat of the board. It must have no more than Y goals. It must always include specific elements, such as an environmental scan, a SWOT exercise, or some use of colored dots.

These and any number of other stipulations can work very well—if they are the right fit for the organization's needs, resources, experience, culture, situation, and intentions. The trick is to understand the organization well enough to develop the best possible process for the specific purpose and moment. With organizations for whom we have guided multiple rounds of planning, the process has changed each time—sometimes dramatically—because the conditions, needs and intentions were different.

This isn't to say there is no common thread among the processes used. We describe an underlying structure in Critical Issues # 5, The Structure of Planning (<http://bit.ly/SyPci05>). But we reshape the basic elements (preparation, assessment, engagement, plan development, implementation) as required.

Surviving Implementation

So with an approach that is well-designed and conducted, let's assume that the organization gets

through the planning process successfully. There is still the question of coping with the implementation plan.

A couple of nicely-designed pages of goals and objectives can be inspiring, but long charts of measurable action items, assigned responsibilities and due dates are often frightening. How can you add management, tracking and reporting of a complex schedule of actions and milestones to an already full plate?

The answer is that sometimes you can't. That's why strategic planning has to take into account the culture, experience, and capacity of the organization as well as its needs, resources and aspirations.

Scope & Detail

A large organization with significant management depth can sustain a much more elaborate system of measuring, tracking and reporting implementation than can a small startup. It can assign someone to gather, track, and report implementation using calendars, sortable tables, Gantt charts, individual and departmental scorecards, and multiple dashboards for different audiences.

A nonprofit with a staff of one, or three, or ten, will want to start with a much less elaborate model. They may need to limit the number of objectives, and conceive of some of them as sequential rather than concurrent. The reporting of measurable results might be limited to a single tracking sheet and a dashboard showing the most critical indicators of progress. For more about what to measure and how to structure the process, see Critical Issues # 8, *The Measure of Success* (<http://bit.ly/SyPci08>) and Critical Issues # 15, *Strategic Action* (<http://bit.ly/SyPci15>).

Operations & Capacity

Strategic plans are often seen as stand-alone programs. The plan may overlap with, or drive, the pre-existing efforts of the organization, but it is understood as a five-, or three-year unit that is owned and managed by someone—often the CEO, CFO or COO. After being launched with genuine enthusiasm, the plan loses energy over the first year, and is dragged out for pro forma reporting from time to time after that.

A much more promising approach is to use the strategic plan as the framework for annual operating plans. If the organization is large enough, these are departmental plans; the strategic plan serves to guide them individually and pull them together as a group. While shaped by the strategic plan's objectives, these annual plans also include other elements of daily operations that didn't need to be addressed at the strategic level. But the operational plans are organized to highlight the critical importance of the strategic objectives.

Coordinated with these operational plans are the job descriptions of individual staff members (and of trustees and board committees). By revisiting job descriptions, revising them to reflect strategic priorities, and using them in annual performance reviews, the strategic plan is brought down effectively to the level of the individual actors.

A reassessment of duties in light of priorities will often require that some work change and some tasks be transformed, reassigned or dispensed with. This can require supervisors to work with those who report to them to think through what is done, why and how, and to make some tough decisions. It can also require attention to professional development for both staff and board as changing conditions of need, funding, or competition require new awareness, knowledge, and skills. For more about managing change, see Critical Issues # 14, *Managing Change* (<http://bit.ly/SyPci14>).

Few of us prioritize and focus our efforts perfectly as individuals. In the context of an organization, this challenge is multiplied by the number of individuals and the imperfect efficiency of communication, coordination and supervision. A strategic plan presents the opportunity to bring all efforts together onto a common path.

There is not *one* correct approach to strategic planning and its implementation, but there always is *an* approach that will be able to move you toward your goals.

Other Critical Issues:

- CI 1: *Why Plan?* (<http://bit.ly/SyPci01>)
 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>)
 CI 16: *All About Collaboration* (<http://bit.ly/SyPci16>)
 CI 18: *Tools for Planning* (<http://bit.ly/SyPci18>)
 CI 19: *New & Renew* (<http://bit.ly/SyPci19>)

Blog Posts:

Arguments Against Planning
<http://bit.ly/SyParguments>

Listening to Stakeholders
<http://bit.ly/SyPlisten>

Good Tension
<http://bit.ly/SyPtension>

SWOT
<http://bit.ly/SyPswot>

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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Three different approaches

For an organization in crisis we compressed the planning process into a weekend retreat, producing a plan primarily focused on a six-month horizon. The expectation was that after six months the organization would stabilize enough to conduct a more robust process that would draw in a much larger group of stakeholders and focus on a longer time frame.

For an organization that had recently stabilized its operations with an excellent, but relatively inexperienced, staff and board, we took the lead in developing an ambitious 12 to 18 month plan. Using this plan, the organization was programmed to grow to a new level within that time period, with a larger staff, a board that was more seasoned, and more volunteers, including non-trustee members of board committees. Then it would be ready for a more internally driven planning process to continue its forward motion.

At the other end of the spectrum, we worked with a complex institution with a good bit of internal planning experience to develop an ambitious five year plan. They did most of the work themselves, looking to us for process, structure, advice and editing. It took them 18 months to develop their plan. When they were done they had not only a robust plan that would guide broad institutional change, but also buy-in from the people who would be implementing it and the depth of experience to develop further planning on their own.

SYNTHESIS

PARTNERSHIP

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