It's Good to Have Plan:
Strategic Planning in Action
October 29, 2019

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CEO/President & Lead Consultant

Agenda

I. The Importance of Strategic Planning

II. Planning Principles & Models

III. Leadership Readiness

IV. Prioritization & Action Planning

V. Generative Discussion

VI. Technical vs. Adaptive Challenges

VII. Take-Aways/Session Wrap-up

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Introductions

- ❑ Name

- ❑ Agency You're Here Representing

- ❑ How do you serve this agency? (ex: staff, board member, volunteer, consultant)

- ❑ What is one question you want to have answered today?

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Framing Our Session

✓ Disclaimer

✓ Safe Container

✓ Words Matter

✓ Conflict Transformation

✓ Permission Slips

Our Strategic Planning Philosophy

* Strategic planning is a **team sport**

* Plans are **living, breathing documents** that go with you everywhere

* Given the ever-changing climate, plans between **1-3 years**

* **Action orientation** with plan specifics, role assignments, timeline and measured success

* Staff & other stakeholder input is important but the **board must own the plan** creation and be "bought-in"

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What is Strategic Planning?

* Focused on big-picture goals and needs of an organization, rather than just checking items off a task list

* Requires broad-scale info gathering, exploration of alternatives & emphasis on future

* Disciplined approach

Common Strategic Planning Questions

* How long does it take?

* Who's responsible for creation? Implementation?

* Do we need an outside facilitator?

* Are we ready for a strategic plan?

* What does the process look like?

Strategic Planning Process

Phase One: Internal Assessment

Phase 2: External Assessment

Phase 3: Management and Leadership Planning Sessions

Phase 4: The Implementation Plan

Phase 5: Review

Source: "The Road to Success: How to Manage Growth" by Mendy Kwestel, Michael Preston, and Plaster.

Guiding Forces

Mission

Vision

Values

Planning Models

Strategic Readiness
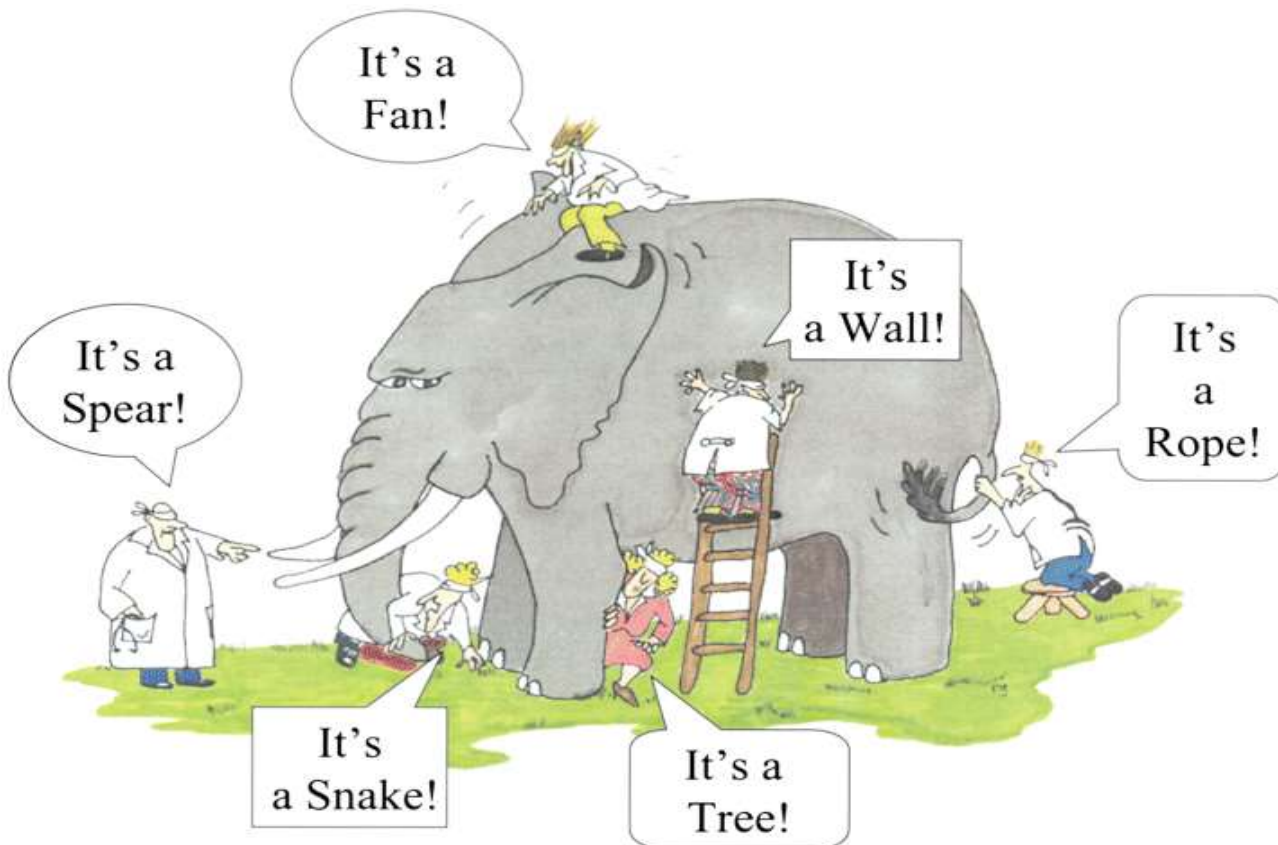
"Plans are useless but planning is everything."

– Dwight Eisenhower

"A great strategy conversation should breathe life into the organization and it's stakeholders."

– Joan Garry, *Nonprofits Are Messy*

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Preparing For Strategic Conversations

The Blind Men & The Elephant

Preparing For Strategic Conversations

"I take it that everyone is in basic agreement about this decision?" Alfred P. Sloan, long-time president and
chairman of General Motors, would say in a meeting. Everyone would nod yes.

Sloan would reply, **"Then I suggest we postpone the decision. Until we have some disagreement, we don't
understand the problem."**

What are your biggest concerns about strategic planning?
What is the best possible success you'd wish for the plan in action?
How will you communicate success & challenges?

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Technical Problem	Adaptive Challenge
It is easy to identify	It is difficult to identify
Most of the time has quick and easy solutions (tried and tested)	It requires changes in the way things are done (changes in approach to work)
It can be solved by expertise or authority generally	People who are working from where the problem is generated are able to solve it.
Requires small changes that also within organizational boundaries	Requires changes at lot of places which may cross organizational boundaries
People are receptive to technical solutions	People resist to acknowledge adaptive challenges
Solutions can be implemented fast and by authority	Solutions emerge from experimentation and discovery, take long time to implement

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Governance Modes

* Fiduciary

* Strategic

* Generative

The Generative Mode

* See current challenges in new light
* Perceive and frame "better" problems and opportunities
* Acknowledge organizations are not always logical or linear
* Discover strategies, priorities, & "realities"
* Suspend the rules of logic to tap intuition and intellectual playfulness
* Encourage robust discourse not quick consensus

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The Generative Mode:
What it Is and Is NOT

* Implicit, rather than explicit. Gets to heart of values and vision.

* Thoughtful, rather than technical

* Framing the problem, rather than finding the solution

* Making sense of knowledge, information, and data, rather than looking for an answer in them

* Telling a story, not making a case

* Get whole board involved early in Generative Work– The opportunity to influence generative work declines as issues are framed and converted into strategic options and plans over time.

© 2015 Cathy Trower, 2015 BLF session: Generative Governance: Art, Science, Impact

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Generative Deep Dive: Preparing for Strategic Planning

* Who are our important stakeholders?

* What are our current client/community needs? How do we know?

* In what ways are they/could they be evolving? How are we cultivating a deeper understanding of the stakeholders that we serve?

* Are we ever at risk of making decisions without fully understanding how these decisions may affect those we serve?

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Action Planning 101

THE MIDDLE *is* MESSY, BUT IT'S ALSO WHERE THE *magic* HAPPENS.

❑ What is our common understanding of what we mean by this goal? What does "done" look like?

❑ What other information do we need to know?

❑ How will we measure, monitor and communicate success with our board, staff, development committee and funders?

❑ Which committee, board/staff member is best suited to lead this effort? i.e. who owns the what? How will they be held accountable?

❑ How might the political climate or leadership changes impact your work or efforts?

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Generative Deep Dive:
Strategic Growth & Expansion

- How would you describe the current feeling about growth and/or change by your staff & board?
- What (else) might be needed to ensure that leadership is prepared for the financial, physical and team growth ahead?
- What ideal ambassador roles do we aspire to for our board & staff during this growth?

Rumbling with… Strategy

* The story I'm making up is…
* I'm curious about…
* Help me understand…
* Tell me more.
* That's not my experience…
* I'm wondering…
* Walk me through…
* Tell me why this doesn't fit/work for you.
* I'm working from these assumptions – what about you?
* What problem(s) are we trying to solve?
* What result(s) do we hope to have?

Adapted from Dare to Lead, The Rumble Process, Dr. Brene Brown

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Final Thoughts

* Parking lot revisit.

* The truly educated never graduate.

* Be where your feet are.

* Empower committees, task forces or work groups.

* Get stakeholder input and often.

* Begin with conversation & connection.

* Ask for <u>AND</u> share resources!

Board Governance & Empowerment Resources

- BoardSource (boardsource.org)

- Board Effect (boardeffect.com)

- Independent Sector (independentsector.org)

- Bridgespan (bridgespan.org)

- CompassPoint (compasspoint.org)

- Network for Good (networkforgood.com)

- Nonprofit Risk Management Center (nonprofitrisk.org)

- Nonprofit Technology Network (nten.org)

- National Council of Nonprofits (councilofnonprofits.org)

- Florida Nonprofit Alliance (flnonprofits.org)

- Guidestar (Guidestar.org)

- Carol Weisman, Board Builders (boardbuilders.com)

- Gail Perry, Fired Up Fundraising (gailperry.com)

- Joan Garry, Joan Garry Consulting (joangarry.com)

- Fundraising Success: Board Engagement & Empowerment in the Process

- Alliance for Justice Bolder Advocacy Initiative (bolderadvocacy.org)

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Put It Into Action

What's one thing you can take from today and put into action for your strategic planning?

Thank you!

Liz Wooten-Reschke, MPA CGT CDTLF

President/CEO & Lead Consultant

For FREE resources visit: www.ConnectforMore.com

To schedule a FREE 30-minute consultation:
laura@connectformore.com

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