



Strategic Planning – Comments from the Field **Compiled by Jane A. Van Buren, Noonmark Nonprofit Services**

What is strategic planning and why should nonprofit engage in what is sometimes a long, complex planning process?

Church Hinds, recently retired CEO of the VNA of Chittenden and Grand Isle Counties defines it this way:

“ ...at some point in the growing maturity of the nonprofit they reach a point of stability and confidence that they can begin to plan and I think that transition from hand to mouth to a more strategic way of thinking about the strategic world and how their agency is going to fit in is characterized by the injection of planning generally but in particular strategic planning.”

Jim Lefevre, a consultant to many nonprofits said:

“ I think strategic plans are really figuring out what’s the destination. What are the mountain tops that your organization really needs to take to be robust, to be as effective as it can be, to be successful at its mission.”

Strategic planning involves choosing the highest priorities for your organization even in challenging economic times.

Brenda Torpy, Executive Director of Champlain Housing Trust talked about recent her experience with strategic planning:

“I think it is precisely in these times that ...if you aren’t strategic and if you don’t stop and plan where you want to be and who you want to be and how to make tough decisions and how you are going to measure them against your mission and core values ...you

could really lurch from crisis to crisis...so I think it is all the more important in challenging times.”

Strategic Planning is doing the right things; operational planning is doing things right. The former is predominantly the domain of the organization’s leadership (board and executive staff); the latter is predominantly the domain of the program and administrative staff. In some organizations strategic planning is a process owned entirely by the board, they chair the planning team and really “own” the process. In other organizations the executive director drives the process and hands a written plan to the board for approval. There is no right or wrong way – it has to do with the culture and history of the organization and with the strength of the leadership.

Church Hinder describes the planning culture at the VNA:

“When I joined the VNA, I inherited a culture that I think I would characterize as compulsive planning. I don’t know where in the 100 year or so history of the agency where that began but I when I look back at my agency and see for example that they survived the great depressionI don’t know if that was the point that forced them into thinking more strategically about their long-term sustainability in service. In 1999, when I arrived I was told that job one for the new CEO, well I think it was 30 days or so we had a big retreat and I was told that the purpose was to start on the next strategic plan. And our board does it with great regularity and great discipline and it’s a big deal in the agency but it’s not of me – if anything I have just continued to feed the planning fire.”

Strategic planning requires a willingness to change (sometimes significantly) and should only be undertaken by organizations willing to consider new and different ways to achieve their missions and to better enable positive impacts on the lives of their stakeholders. Is your organization in a good place to start strategic planning? Ask yourself the following questions:

- Is the organization in crisis? Do you spend too much time putting out fires?

- Is the Board of Directors committed and engaged?
- Is your leadership team solid? Do the board chair and Executive Director communicate regularly and effectively?

Again, Church Hinds expands on his experience:

“Planning can’t displace the work of the agency. It is very easy to sit up late at night or Saturday morning at the office and design a planning process that would be elegant that if there was a Smithsonian museum of strategic plans it would qualify to be hung on the wall. To execute it – it is so involved and complex – that to execute it your strategic team is going to be spending more time planning than doing and there is going to be push back and resentment and it needs positive energy to carry it through”

Brenda Torpy added:

“A successful plan for us is really that it be strategic and sometimes people get nervous about planning, they think you are going to get away from core things...”

Strategic Plans do not predict the future. The strategic plan proposes future action steps but cannot predict exact implementation activities into the future. The plan will, however, take into account the business elements of operating a nimble nonprofit and help guide future resource development and deployment.

In Jim LeFevre’s experience he has notices:

“You may find yourself in 2 years realizing that what was thought to be very important is less so and that something else has come in from left field which was totally unexpected. You need to be flexible and by designing a process whereby you check in every 6 months will allow that.”

Brenda Torpy describes the process at Champlain Housing Trust:

“...mid way in the strategic plan the board meets, we take a Saturday and see where we are against the plan and if there have been any major changes in directions which come up in the board meetings in little way. You know we look at them and ...it gives them a chance to tweak.”

Church Hinder added:

“We know that when we adopt a plan that it is going to be incomplete because things are going to surprise us, so with regularity we will go back to our board and say “this was a big deal we thought, but is turning out not to be a big deal at all and I think we can deemphasize that... however, this has come in from left field and I had no idea it was coming. I think we need to integrate it.”

Strategic Planning is iterative. The thinking, the collective experience of staff and board and the research may change the course of the planning and challenge earlier assumptions or conclusions. Does your organization think strategically? Ask yourself the following questions:

1. Is it creating strategy from a shared vision?
2. Is data gathered continuously from and about its external environment?
3. Does the organization learn from the past?
4. Are there immediate measurable goals in place?
5. Have individuals or teams been designated to be responsible for implementation?
6. Is the organization creative and flexible? Does it recognize, reward and institutionalize positive change?
7. Has your organization moved away from “looking for a fix” and toward reflection and planning?

Church Hinder sums it up this way:

“Strategic planning done well is very introspective and it brings up issues in the rough and tumble of every day that you would never have time to talk about. Strategic planning done well with adequately informed constituents speaking will at times make you breathless. To hear a family member really tell us something that we can move and change that we never would have heard about if we hadn't involved her or a LNA raising her hand and saying” if only you did this my work would be so much easier” Those little actionable surprises that come through a process that is sufficiently inclusive and I consider it something I look forward to. It is a very energizing time in the life of our agency.”