

Project Pointers

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By *Marta A. Brockmeyer, Ph.D.*

You may notice that Project Pointers has a fresh new look, as does my website. Like so many of you, the focus and substance of my work changes with time and experience. While I still enjoy managing projects and teaching in the field, my professional energy is as likely now to revolve around organizational development issues and broader planning efforts. As a result, I am being invited to do more coaching and strategic work with senior management. This shift in the heart of my work required me to do what I advise my clients to do: step back, think about what I want and take intentional, thorough steps grounded in clarity and purpose. I resisted, I dragged it out, I wondered if I could afford the time off from “real” work, I wondered if I’d ever implement anything. (I have!) Sound familiar? I invite you to do the same as we review the fundamentals of strategic planning in this newsletter.

Getting Started

Because we all have different notions about change and planning, here is a definition to set the stage for strategic planning: a disciplined, intentional process that produces the defining decisions and actions of an organization.

The best way to approach strategic planning is to kick back, put your feet up on your desk and let your mind wander. This initial bouncing around of ideas is just what you need to jump-start your brain. Rather than viewing this as a waste of time, consider it a vital, integral part of the planning process.

As outlined in previous newsletters that were devoted to sound project management, good planning starts with the goal -- the desired outcome of the work. Focus on what you want and where you're headed, then work backwards. It's good to realistically assess the planning environment by asking questions about the following:

Time

Is the timing right, or does the planning need to occur at a certain time of the year?

Is there a target date even if it's an unusual time?

Do you and others have the time to do a thorough job of planning?

How much time is this likely to take?

Are there external pressures that are speeding up the timing of this?

Marta's Upcoming Class
Successful Project Management
March 22 9:30 a.m.-- 12:30 p.m.
Register online at:
www.healthfoundation.org

Resources

- Is the required information available?
- Do you have the required space, software and other resources?
- Will the budget support the planning?

Participants

- Are there enough people to plan and support what they help create?
- Will community members and outside experts participate?
- Are you personally committed? To what extent?
- Does the planning team have the right mix of skills, roles and work styles?

Mission

Change and planning do not occur in a vacuum, of course. They must be considered with an eye toward an organization's mission. A mission is a broad, clear, inspiring statement that captures the spirit of the organization. It reflects the core purpose for which a nonprofit is created and should flow through all of its work. A mission statement answers three basic questions:

1. Why do we exist?

The statement should indicate what societal and stakeholder needs are being met. It should also clearly articulate the organization's purpose and added value.

2. Whom do we serve?

This phrase should include the customers, stakeholders and target geographic area.

3. What do we produce?

Finally, the products and services delivered should be clear; this may be articulated in terms of the organization's response to social or political needs.

When all three have been answered, edit heavily. Try to make the mission statement short, clear and memorable. Then, think more creatively about what we'd like our nonprofit initiatives to yield. For these kinds of thoughts, we need to turn to visioning.

Vision

Visioning brings people together around common dreams and hopes for the future. It lays a foundation for major improvements in an organization. A vision describes the desired future state of the organization, what an organization wants to be and do in the coming years. It brings to mind creative solutions, continual evolution and learning. The process

usually involves many people who offer a variety of ideas and suggestions, often brainstorming as a group. Visioning includes three components:

1. Critical Issues

These go to the heart of an organization's ability to deal with the environment in which it works. These might include changes in the levels of service, funding or organizational design. Here are some sample critical issues:

- How can we maintain an effective, qualified staff?
- Should we create satellite offices in an adjacent county?
- How can we increase citizen participation in our meetings?

Try to limit yourself to three or four critical issues to avoid feeling overwhelmed.

2. Possible Limitations

These reflect issues that make it difficult to conduct visioning exercises. Limitations include forces that might get in the way of good work or prevent clear thinking. Sample limitations to visioning might include:

- The staff lacks the necessary skills to deliver services.
- Our culture does not value planning.
- It's the busiest time of the year and people are distracted.

3. Clarification of Core Values

Core values are the principles and most cherished beliefs that underlie and guide how an organization goes about fulfilling its mission. They determine the norms and standards of acceptable behavior; they are enduring, consistent over time. Core values examples follow:

- Commitment to timelines
- Safety in the work environment
- Professional development for all employees

Core values come into play constantly -- hiring processes through public relations. When an individual's values differ from the norms of the nonprofit, enthusiasm and commitment for strategic planning are slow in coming.

Internal Strengths and Weaknesses

The easiest way to assess an organization is to look at strengths and weaknesses in light of external forces. Internal strengths are the resources and skills that help an organization accomplish its mission. Internal weaknesses are those deficient resources and skills that prevent an organization from accomplishing its mission. Strengths and weaknesses may cover a wide range of issues, depending on the project and the people conducting the

assessment. For example, it may be particularly important for staff to arrive on time in a small nonprofit. Or, an outdated information system may prevent an organization from attempting an accreditation process.

External Forces

External opportunities are outside situations or factors that can positively affect your organization. External threats are outside situations or factors that can negatively affect your organization. Usually, this organizational assessment involves many people. Even for small planning efforts, it is unlikely that you would sit alone in your office and complete these reviews. The more people involved, the more honest and complete the product. We especially need outside feedback when we are thinking about what we'd like to improve.

Goals and Objectives

Now that we understand mission and our vision, we can move on to setting goals. Terms like *goals* and *objectives* are never defined the same way by two people and they lead to a great deal of miscommunication. For our purposes, the term *goal* refers to the higher level product of the work and *objective* refers to some of the steps in the process. More specifically, a goal is a broad statement of what we want to accomplish. It's the work product that takes us toward our vision and helps us accomplish our mission. Two goal examples follow:

- Create a partnership with the district police staff.
- Evaluate the infrastructure against the organization's technology needs.

Once we have our goals, we get more specific. Objectives are specific, measurable, time-bound statements that get at accountability and responsibility. They must be achievable within a period of time and allow the staff some flexibility. Sample objectives for the above goals might be:

- Co-teach courses at police training academy.
- Create online assessment process.

Understanding the above concepts will position you for effective strategic planning. The next edition of Project Pointers will examine Critical Success Factors and tips for keeping the planning process manageable. In light of our recent weather, I wish you all a happy Spring!

Marta A. Brockmeyer, Ph.D.

553 East 4th Street • Newport, KY 41071 • 859-581-7089
marta@martabrockmeyer.com • www.martabrockmeyer.com

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