

Project Pointers

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

Several readers called after receiving the previous newsletter. No matter how many times nonprofit professionals have participated in planning, certain aspects of the process remain challenging. I heard some interesting stories from last year and commend my colleagues for their heart and senses of humor. In this spirit, *Project Pointers* continues the strategic planning discussion.

As we learned, strategic planning begins with a thorough analysis of an organization's schedules, timing, resources, participants and mission. This is followed by the creation of a new vision and clarification of core values, complemented by a fresh look at internal strengths and weaknesses. Once the process has moved to the more concrete level of goals and objectives, planning participants can think about conditions for success.

Critical Success Factors

Critical Success Factors (CSF's) are those three to five factors that must be right/go right for the organization to advance its mission. They make or break the planning effort. Therefore, the starting point for identifying the CSF's is the mission statement. To help identify these factors, try to focus on a few general guidelines. First, focus on what is truly fundamental to the work of the organization or project. Then think about factors that will remain critical for the life of the mission. In other words, try to think ahead for some time and ask whether the same factors will come into play then as well as now. Third, consider sources for ideas about what is critical to the mission. These might be board minutes or notes from case managers' meetings. When you've considered these three guidelines, ask two important questions:

See Page 3 for Marta's
Top Ten Tips
for Strategic Planning

What must be right and go right in order to advance the mission?

What, if it went wrong, would jeopardize the mission?

Some examples of Critical Success Factors follow:

1. Board engagement
2. Staff understanding of the relationship between strategic planning, annual goals and performance evaluation
3. Development of new relationships with mission-compatible government and non-profit organizations.

This review will probably go through several versions. Hopefully, you will be brainstorming with colleagues and your first lists may be quite long. As you talk further, you will probably see that many of the things listed can be grouped into a few broad categories.

Communicating the Strategic Plan

At this point, you may regard the various components of the planning process with dismay. For many people, writing the strategic plan is the most difficult step. Nonprofit plans may run from one page to twenty pages, but the trend is toward short, simple documents. The length and complexity depend in part on how you hope to distribute and actually use the plan. I encourage clients to write their own plans and a small group is often charged with this task. While an outside facilitator may be helpful for the planning process, internal stakeholders are usually better at producing the actual document. Also, the process of sharing drafts with staff and board members increases buy in and gives everyone an opportunity to confirm the plan's direction.

Marta's Upcoming Class
Successful Project Management

November 5, 2007
9:30 a.m.-- 12:30 p.m.


Register online at:
www.healthfoundation.org

Once the plan is finished, distribute copies to all staff and board members. It is surprising how few employees have seen their organization's strategic plan, yet they are responsible for ensuring the plan's success. For the goals of the plan to "sink in," the communication must be ongoing. For example, references to the plan can be included in newsletters and employee manuals so the plan becomes a regular part of organizational life.

Implementation Planning

Now what? Most strategic plans fail because they are not accompanied by a rigorous implementation planning process. The approach to this process is highly individualized, often unique to the organization. It may reflect CEO personality, the preference of the staff member who is charged with the tracking or Board direction. What matters is that the objectives are broken down into measurable language so the plan is actually implemented.

Ownership is key. One person should manage the process, each objective should have a staff member's name by it and shared responsibilities should be clear in black and white. In the press of daily nonprofit life, it's easy for this work to be set aside — someone has to keep implementation rolling. All reporting dates should be clear and the plan should be updated quarterly.

The actual implementation plan should be as simple as possible. It should contain goals, strategies, objectives, timelines and owners. While the plan *may* contain more variables, these are the essential ones. The actual appearance of the document greatly affects its use. User convenience and comfort contribute to implementation. For example, the layout should contain enough white space for easy reading and abbreviations and jargon should

be avoided. If the document is shared online, drop down menus can be added. The *group's* report is the focus; overly wordy contributors should be asked to write more succinctly.

A complicated implementation plan is almost as dangerous as the absence of one. Highly detailed, cumbersome plans are maddening for those expected to complete documentation. At some point, such extreme reporting interferes with the ability to deliver services to clients. As a reminder, good planning should reduce—not increase—stress and keep everyone focused.

Best wishes,



Dealing With Difficult People

Coming this fall!

Marta's new workshop is being developed in response to many client requests and conversations related to previous issues of *Project Pointers*.

Please contact Marta for details.

Marta's Top Ten Tips for Strategic Planning

1. Be sure your organization will benefit.
Assess the community climate and the organization's senior leaders' skills to know if the timing is right. Make sure the organization has the capacity and energy to begin and successfully complete this process.
2. Adopt simple, clear terminology.
Define *strategic planning* and gain support for its meaning. Keep in mind that planning terms are used differently in different cultures. For example, *objective* means different things in different places. This may be particularly confusing for Board members who are involved with other professional and volunteer activities.
3. Set realistic time frames.
Ten year plans are unrealistic in most cases. In the nonprofit world, three years is as far into the future as most groups can consider. Also, implementation plans are greatly limited by budget cuts, staff shortages and increased work loads. Be real about what the organization can take on.
4. Integrate the planning with Board development.
The planning process brings a natural, positive opportunity for Board members to be more actively involved in the organization. The Board can create new expectations for membership, expand its roles and influence fundraising.

Marta's Top Ten Tips for Strategic Planning

(continued)

5. Engage stakeholders.

Strategic planning offers an ideal way to connect with those in the community. The conversations often lead to new initiatives which meet funders' preferences for supporting collaborations.

6. Involve employees at all levels.

Staff members have a unique ability to assess needs, know what programs are not working and offer creative solutions. Since people support what they help create, their input should be requested early. And they must know that their thoughts matter—that this is not just an exercise.

7. Ask clients what's missing.

It's common to confer with "experts" in the field. But the people who *live* the real lives that are the focus of an organization's mission often know what is best needed. Collect client comments, take them seriously and deliver feedback when the planning is completed.

8. Design the implementation process before goals are set.

Strategic plans fail because they are not implemented. To counter this common problem, establish and publish the implementation steps before the plan is finalized. People will have more trust in the process and much time will be saved.

9. Charge one person with implementation leadership.

Plans have no inherent value without action and it can be difficult for busy employees to remain focused. Put one person in charge and hold them accountable.

10. Revisit the plan.

Build in regular dates for reviewing, evaluating and changing directions as needed. The strategic plan should accommodate a few turns and occasional revisions. The end date should always be kept in mind, however, and a formal date for starting the next plan's development should occur before the end of the current plan.

The above tips will move you along toward effective strategic planning. Please let me know if you would like to talk about your experiences with planning.



Marta A. Brockmeyer, Ph.D.

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