STRATEGIC (AND SUCCESSFUL!) PLANNING

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STRATEGIC PLANNING: BUST OR BOON?

Organizations that embark on strategic planning usually have many questions. Most of these questions, appropriately, get to the heart of the matter: *Who are we and why do we exist? What is the change we are seeking to make in the world? What are the most effective ways for us to make that change?* Others center on the endeavor itself: *Will the process exhaust or invigorate us? Will it be worth our time? Will the plan actually be useful*?

These questions arise for good reason. As consultants who work with organizations committed to social justice, we know well the urgency our clients feel about strategic planning (the systematic process of taking stock of opportunities and challenges, developing a picture of what success could look like and identifying the pathways to achieve it). We share their commitment to and belief in social change. We know that the successful fulfillment of their missions and the achievement of their visions will result not in greater profit margins, but in a better, more just, sustainable world. We know that a good planning process is important for building momentum, and the resulting plan must be useful in helping the organization to effectively fulfill its mission.

Yet we also know that many people have doubts about the value of strategic planning, to the point that they dread or even avoid it. These doubts often arise from having experienced processes that went bust, usually for one of three key reasons.

The first kind of bust occurs when a completed strategic plan sits on a shelf and gathers dust, rendering the time and energy that went into its creation a complete waste. As things move forward, there is little or no relationship between the plan and the organization's actual activities. This often occurs when the plan was developed primarily by outside consultants, or the completed plan is so big that it can only be moved by a tow truck. It might look good on display, but its contents are too much for the organization to own in its bones; they may be overwhelming simply to track, let alone implement. Such a plan is often discovered years later, like a dusty Model T forgotten in a garage, little more than an interesting artifact of ancient history.

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The second bust happens when the plan is treated as a static endpoint, rather than a dynamic, living document. Instead of guiding continued innovation and learning, it constricts creativity and momentum. The organization may dutifully stick by the plan and technically achieve its goals, but its implementation lacks creativity and teems with missed opportunities; rather than taking an open road to the future, the organization gets stuck in a car-pool lane, missing new exits to opportunity and beautiful vistas of possibility, arriving far short of where it might have been.

The third bust is when the plan is either too much of a stretch for the organization or too little, leading to a lack of dynamic movement or a pervasive overwhelm which saps all focus and clarity: too low a gear doesn't get you anywhere, and too high burns your engine out. In either case, the organization can find itself down the road in a drastically different place than it hoped to be. It really needed a hybrid car, not a child's scooter nor a jet airplane.

Busted end results are not the only misfortune associated with strategic planning. Many of us have also experienced dull or endless processes that left us wary of the entire endeavor. No wonder the mere mention of the term can generate groans and grimaces.

Despite these unfortunate possibilities, we believe strongly in strategic planning and the power of a good plan, and we remain convinced that effective strategic planning can be a significant boon to an organization. Identifying a clear purpose, a shared vision and compelling goals and objectives can powerfully propel an organization forward while providing essential guidance for daily operations and future decision-making. A plan can channel an organization's energy and resources to realize its mission, rather than spin its wheels. The process itself can also be galvanizing, creating positive momentum and more organizational focus and energy.

So what determines whether a strategic plan will be a bust or a boon, an abandoned piece of paper or a useful and trusted guide?

Strategic planning results in an exciting, energized, successful organization when everybody involved is aligned about what they're doing, why they're doing it and how they're going to do it. To assist organizations in achieving this, we have identified a framework that leads to creative, dynamic, useful plans. The six sections of the framework mirror the flow of optimum strategic planning processes:

> Identifying a clear purpose, a shared vision and compelling goals and objectives can powerfully propel an organization forward while providing essential guidance for daily operations and future decision-making.

- **Setting Up the Process**

- **Building Ownership**

- **Starting Where You Are**

- **Envisioning the Future**

- **Designing Realistic Pathways**

- **Living in the Plan**

These stages of planning do not exist in isolation, nor are they always linear. Rather, they inform and build off each other: the thoughtfulness with which you go about *Setting Up the Process* determines the success of the whole project and can help in *Building Ownership* throughout; *Living in the Plan* will be easier if you have attended to *Designing Realistic Pathways*. What follows then is not a step-by-step "how-to" manual, but rather a set of suggested practices and principles based on our experiences and observations.

Figure 1.
Framework for Strategic Planning
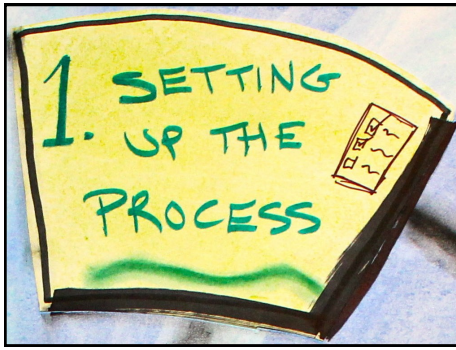
SETTING UP THE PROCESS

Though an organization may be itching to get right to the heart of its strategic planning work, carefully setting up the planning process is crucial for everything that follows. Time and energy invested in pre-planning is not just an ounce but a pound of prevention, an integral step toward a successful process and plan.

- **Make sure strategic planning is appropriate for your organization**. Organizations can sometimes look to strategic planning as a magic bullet, but it isn't always what they need. Don't engage in strategic planning unless you are prepared to change how you operate or take on new endeavors. Good reasons to embark on planning include: your old strategic plan has been completed or no longer fits, your organization is unfocused, you have new leadership, or your external environment has shifted. Strategic planning should not be undertaken as an end-run around difficult personnel issues or other internal dynamics.

- **Develop strategy primarily for internal reasons**. If plans are developed with outside interests in mind – funders, for example – they are unlikely to be useful as long-term guides. Mission drift is also more likely to occur, due to lack of buy-in and the phenomenon of the "tail wagging the dog."

- **Before planning begins, create a Planning Process Map.** Developing a guide for the process can alleviate some of the anxiety associated with planning. Important elements of a Planning Process Map include: critical questions to be answered, strategies for including the voices of stakeholders, protocols for decision-making and communication, roles and responsibilities of participants and consultants, a timeline, a budget and a blueprint for the completed plan (i.e. what it will look like and include).

- **There is no such thing as a one-size-fits-all process or plan**. Every organization has its own configuration of unique questions, strengths, challenges and resources. The length, depth and focus of the strategic planning process can vary widely, and organizations should design plans that fit their own distinctive characteristics, culture and needs. We have supported successful strategic plans that were intensively developed in a very short period of time, and others that were developed over the course of a year. Don't feel like you need to follow a formula that prescribes a rigid method for strategic planning.

- **Form a Planning Committee.** This group can shepherd the process, synthesize data and ideas, and prepare proposals for a larger group to

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consider. The more diverse the committee is, the better: draw from different roles and levels within the organization (board, staff, management, even outside stakeholders), as well as the diversity of opinions about who and what the organization should be. However, make sure the group is not so big as to be unwieldy – between four and eight people is ideal. People who serve on these committees often find it a rich and rewarding experience, so don't hesitate to ask people to join, even if you're uncertain about their availability.

- **Make sure you have appropriate leadership.** Internal leadership is essential to the success of both the planning process and the plan's implementation, providing the hand on the rudder that keeps the ship on course toward the real issues it faces. Middle and lower-level leaders can be instrumental in shepherding the planning process and implementation, but top leadership must support the endeavor publicly, actively and wholeheartedly. Even the best and most creative plans need champions in decision-making positions to facilitate their implementation.

- **Clarify decision-making and influence prior to the onset of the process.** People within organizations, particularly staff members, can be unsure of how their voices and opinions will inform the plan. This can lead to increased anxiety and mistrust throughout the process. Developing a clear framework, prior to the start of the process, for who will have input into which elements of the plan and how decisions will be made can eliminate confusion later on and promote genuine participation.

- **Agree on the components of the completed plan at the outset.** Will the plan be a detailed road map or a lean outline? Typical components of a completed strategic plan include:

  - A brief overview of the organization and its significant accomplishments
  - An analysis of the organization's internal workings, the external environment within which it operates, and the challenges and opportunities it faces. This is often called a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.
  - Mission/Vision/Values (we call these "Guiding Ideas")
  - Goals
  - Strategies
  - Objectives

We often suggest that the plan include the following elements as well:

- ▫ A Theory of Change detailing the assumptions that underlie the work of the organization

- ▫ Definitions of key organizational terms

- ▫ Strategy Filter(s) explicating the criteria that will be used to make future strategic decisions

While the final plan may contain some different elements than originally intended, agreeing upon a clear outline in advance facilitates better understanding when the need for flexibility arises.

- ■ **Establish clear, shared definitions of key planning terms.** We often find that people using the same language mean different things. Taking time to explicate the meanings of key terms and ideas will pay big dividends for future conversations. It will also enable participants to work more effectively toward the same ends and avoid unnecessary conflict when the plan is complete. There are many definitions of key planning terms, but these are ours:

  - ▫ **Values:** What you stand for; your beliefs in action. Values are aspirational and should not be limited by your present reality.

  - ▫ **Mission:** Why you exist and what you do. Short, simple and pithy is best.

  - ▫ **Vision:** A picture of your desired impact and successful future. Your vision can be long-term, medium-term and/or short-term. We encourage our clients to develop visions that fit the timeframe of their plan, along with long-term visions if that is meaningful to them.

  - ▫ **Goals:** Broad, overall priorities for how best to fulfill your mission and achieve your vision. Organizations can be tempted to take on many goals, but we encourage our clients to focus on three; if that is not possible, we recommend no more than five.

  - ▫ **Strategies:** The most effective ways to achieve your goals.

  - ▫ **Objectives:** Specific, measurable things you will achieve, framed as results (i.e. not the processes used to get there). Depending on the need and style of the organization, we generally recommend three-year objectives, spelled out year by year.

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> Whether an organization knows that hard decisions lie ahead, or surfaces unexpected issues during the process, everyone should be prepared to take part in meaningful conversations in order to move beyond a superficial plan.

- □ **Strategy Filter:** A tool that names the criteria you will use to make decisions about opportunities, ideas and threats. Strategy Filters can be used during the planning process and/or developed for use after the process is complete.

- ■ **Anticipate the unexpected and keep the process nimble.** Just like completed plans, the best-laid strategic planning processes need to be able to respond to life's curve-balls: key staff leaving, new funding, an internal conflict. Sometimes the process itself surfaces underlying issues and must be adjusted to accommodate the unforeseen. It is important not to let such speed bumps become road blocks that stall your process.

- ■ **Be prepared for difficult conversations.** Whether an organization knows that hard decisions lie ahead, or surfaces unexpected issues during the process, everyone should be prepared to take part in meaningful conversations in order to move beyond a superficial plan. Successfully engaging in such conversations builds organizational muscle and fosters the habit of addressing issues as they emerge, which in turn increases the organization's planning and implementation capacity. Dealing with challenging issues as they emerge will also help ensure a successful process and plan; avoiding them can hinder the process and will almost certainly interfere with, if not outright obstruct, implementation.

CASE STUDY:
Setting Up the Process

When Organization A, a small non-profit, hired us as strategic planning consultants, they were already working on a case statement for funders, a branding initiative and two different program evaluations. Our first step was to examine each of these efforts, identify their goals and braid them together into a consolidated Planning Process Map. The map established when, why and how each component of the process would take place and how that information would inform the plan, so that everyone involved understood both the big picture and the individual steps. We also prepared the leadership of the organization for the likelihood that new issues and ideas could emerge over the course of the work itself. When this did occur, they were excited, rather than frightened, able to take advantage of opportunities, rather than back down from potential complications. The transparent, flexible process enabled the organization to clarify and focus its purpose, and thus to transform what had been a collection of related but disparate programs into a unified strategy.

BUILDING OWNERSHIP

Successful change processes are as inclusive as they can practically be, drawing upon the wisdom and perspectives of many stakeholders and using the process to build organic ownership for implementation. However, these processes can also overtax participants, drawing time and energy away from their other work and generating frustration that mitigates the positive results of their involvement. It is important to strike the right balance between inclusion and efficiency, and to make sure that everyone involved has the information and context they need to participate effectively when they are at the table.

- **Build buy-in through inclusion and participation.** Good plans draw on the wisdom and insights of multiple perspectives, but they do so at the right moments. Carefully crafting points of engagement and input for participants leads to a richer, wiser and more widely-owned plan, without bogging down the process by involving everyone in every stage. Roles for board members, staff and other stakeholders (clients, allies, funders, consumers, etc.) may include: serving on the planning committee, participating in focus groups or retreats, responding to surveys and interviews, reading drafts of the plan, or joining ad hoc committees to consider particular issues.

- **Help people within the organization understand the process and how the completed plan will serve the organization.** Developing a shared understanding of the overall process, where it will lead and how it will potentially strengthen the organization and the work of individuals helps to reduce anxiety and create buy-in.

- **Retreat to move forward!** Bringing together multiple stakeholders can be a powerful opportunity for creative thinking. The cross-fertilization of experiences, thoughts and energy that occurs at a retreat can generate lots of good ideas and excitement. It is important to remember, however, that retreats are milestones within planning processes; they should not be confused with the whole process.

- **Make planning processes engaging, energizing and dynamic.** Strategic planning should charge people up! Processes are energizing when they put the right people together at the right time to talk about the right things. Well-facilitated processes that focus on possibilities, rather than deficits, can serve to strengthen teams and organizations,

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- **Use the process to build external relationships.** While strategic planning focuses on an organization's own future, it can also provide an opportunity for developing existing and new relationships outside of the organization. This can happen in a number of ways: external allies can serve on the planning committee; staff or board members can conduct interviews with external stakeholders to solicit their input into the plan, get their perspectives on the organization, or gather information about the external environment; key stakeholder can be invited to planning retreats; and drafts of the plan can be shared with critical readers.

- **Use the process to build internal relationships.** Bringing smaller teams together – whether they are cross-functional and don't normally work together, or program-specific and generally absorbed in the day-to-day – is a huge benefit of the strategic planning process. The benefits of engaging in strategic internal conversations about the organization's work cannot be overstated. It not only generates better thinking, but also fosters relationships that last beyond the planning process.

- **Keep the process transparent**. Frequent (but not *too* frequent) communication with internal stakeholders, board, staff and customers/clients will keep them informed about the process and how it's going and provide an opportunity to remind them about how and when they will have a voice in the process. This will help maintain commitment, engagement and trust.

CASE STUDY:
Building Ownership

Program B, part of a large international organization, had recently been revamped, but while individual staff members, who were located all over the world, knew their own roles, they had little sense of how they connected to each other or to a larger purpose. An advisory board, also international, was still getting to know the program, and felt similarly uncertain of how best to support it. We worked with a planning committee, with repre-sentation from all the program's components, to design a series of retreats that brought together the entire team, as well as external stakeholders, to think and plan in dynamic, interactive sessions which we facilitated. As a result, staff and advisory board members felt a new sense of ownership: they fully understood and embraced the program, its purpose, their own roles in it and their capacity to define its future.

STARTING WHERE YOU ARE

As planning begins, participants are often hungry to look ahead. However, in order to figure out how to get to where you want to be, you need to know where you are. A realistic assessment of the current reality will give power to the process and the plan.

- **Find out what's already known.** Organizations sometimes know more about their future directions than they think they do. Don't assume that what you have known to be true in the past is no longer applicable for the future. Make sure to capture past and current thinking; this effort can also crystallize ideas that have been germinating but are not yet fully formed or articulated.

- **Build on what's working and deal with what's not.** Focusing on existing strengths and assets allows you to build on what works. We strongly believe that what you focus on is what you empower. An appreciative, asset-based lens allows you to concentrate on what you would like to expand and enhance. At the same time, make sure to consider the whole picture of your organization; a solely positive approach that ignores or glosses over challenges can end up being inauthentic and ineffective. A well-facilitated process can be a way to transform a culture of negativity, skepticism or fear into a vibrant and affirming environment.

- **Gather only data that will be useful.** It can be tempting to start the planning process by gathering as much data as can be found, but it is more effective to identify the information that is really needed to provide a clear picture of the internal and external environment within which the organization operates, inform people's thinking, offer new perspectives and broaden horizons. Targeted data will be more easily synthesized, digested and actually used.

CASE STUDY:
Starting Where You Are

When Organization C began a strategic planning process, they had recently discovered that several longtime funders would be withdrawing their support as a result of changes in their own program priorities. The impending loss of revenue did not affect the organization's work on guiding ideas; indeed, the data they collected through com-munity meetings and one on one conversations fully affirmed that they had the right mission and were doing the right work. Knowing this, once Organization C developed their strategic framework and filters, they could create three different scenarios for moving forward, depending on their as yet unknown financial situation. This allowed them to seek new partners and funding sources, while still knowing that they would be able to achieve their core goals, regardless of how long it took to rebuild their revenue streams.
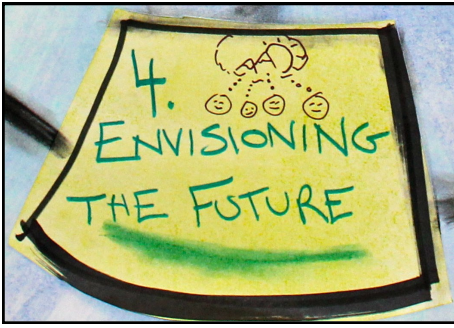
ENVISIONING THE FUTURE

Gaining clarity about exciting and compelling future possibilities builds energy. When we have a picture of what success can look like, we can better imagine how to achieve it.

- **Get real agreement on the "Guiding Ideas" of Mission, Vision and Values.** Everything else follows from these overarching ideas of why the organization exists, what it stands for and where it wants to be. This work isn't just about producing well-crafted "statements"; it's about coming to real clarity and understanding about the purpose and beliefs that drive the organization. Failing to attend to these essential elements will usually lead to diffusion of organizational energy and confusion down the line.

- **Big ideas flow down to more specific elements.** Like water flows downstream, the elements of a plan flow down from the "Guiding Ideas" furthest upstream to clear pathways for implementation via Goals, Strategies and eventually Objectives. We always look to see what needs to be clarified upstream before moving downstream to more specific, practical issues. The clearer the big picture, the easier it will be to resolve the more concrete issues.

- **Help folks step away from current programming… and come back to it.** Stakeholders need support to step away from their daily work in order to imagine what might be possible. At the same time, plans ultimately need to be grounded in reality, taking into account current and likely future constraints. Planning should be an iterative process that allows you both to dream big and to ground yourself in reality. It helps to move the conversation away from what programs should be continued or created and toward defining success and then identifying the best path to achieve that success in the context of both dreams and reality; this allows new ideas to emerge, while sustaining effective current programming.

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CASE STUDY: Envisioning the Future

Before they undertook strategic plan-ning, Organization D had a broad mission which they were addressing though a wide range of projects and programs. All of these were important, but as a whole, they diluted the organization's potential impact. Their strategic planning process identified a clear organizational purpose and vision. This, in turn, enabled them to paint a picture of what success would look like in three years and to develop a strategy filter for identifying what they would do to get there – as well as what they wouldn't do. Once they understood the future they were trying to create, and their role in it, the direction of their programming became crystal clear.

DESIGNING REALISTIC PATHWAYS

Once an organization has identified its vision and where it wants to be, the gap between current and desired realities can be huge and painful. Although they may not know all the ways that they will bridge the gap, they need to know that it can be done and that their actions will move them in the right direction. An inspiring idea will only get you so far if you don't have a clue about how to achieve it.

- **Test assumptions.** As you discuss and develop strategy, you should test the assumptions that underlie your thinking. Social justice work can be a leap of faith. We are working toward something that doesn't currently exist, and we don't really know what it will take to create the more just and sustainable world we seek. Many of us, however, have strong hunches and beliefs about how to do it. It is important to spell out these assumptions to make sure they are shared and to help the organization enthusiastically and whole-heartedly put its energy behind its own particular leap of faith. Creating a "Theory of Change" about how we believe our actions contribute to our goal can be a useful way of uncovering our assumptions about our work and explicating our model for creating the change we seek.

- **Carefully align programs and activities.** In general, identifying goals should not be the endpoint for strategic thinking. Connecting goals to specific programs and activities ensures that ambitious plans will be grounded in reality and furthered through the actual work of the organization.

- **Develop a Strategy Filter.** Plans are best when they serve as guides, rather than as rigid agendas that dictate future actions, regardless of how the environment changes or what you learn about your work. To respond to such shifts within the context of a strategic plan, it can be useful to create filters around specific areas of work or critical issues. In creating a strategy filter, an organization identifies the criteria it will use to assess and make decisions about unanticipated opportunities, ideas and challenges that arise after the plan is complete. A strategy filter helps an organization stay true to its strategic direction, while making adjustments to benefit from new learning, the changing environment and new opportunities. Filters can also be tailored to specific big questions an organization faces; we have seen organizations benefit from partnership filters, funding filters and structural filters, to name just a few.

- **Assess capacity and resources.** "Pie in the sky" is one way we describe an unreachable dream or goal: it looks beautiful and delicious, but there's no way to eat it. Organizations must think seriously about the capacity and resources they will need to implement their plans. While we don't want to limit dreaming and possibilities early in the planning process, we ultimately must match our aspirations with our resources - human, financial and otherwise. Organizations must take a critical and realistic look at what implementation will really require. Do they have what they will need? If not, will they be able to generate new resources, and are they willing to grow and change in order to successfully implement the plan? It is important to know the answers to these questions to avoid wasting time and energy tilting at windmills.

- **Build structures to meet goals.** We believe strongly that organizational structure should be designed to meet functional needs. Once an organization has a plan, it must be willing to reconfigure how it does business in order to achieve the plan's goals. If the organization sticks to its old structures, chances are it will continue in its old ways, and its new aspirations will not come to fruition.

- **KISS: Keep It Short and Sweet!** We believe that the more concise the actual written plan is, the more readily everyone involved will be able to understand and metabolize it. A one-page graphic representation can also be a great tool.

CASE STUDY:
Designing Realistic Pathways

Organization E was good at coming up with exciting ideas for putting their guiding ideas into action, but they needed help figuring out how to pursue them effectively and sustainably. We helped them articulate their Theory of Change, in the process surfacing and integrating the many different assumptions about their work that staff and board members brought to the table. It became evident that the differing assumptions had led to different programmatic priorities within the organization, which had led in turn to a diffusion of focus, a lack of clear direction and a lessening of impact. Developing one clear Theory of Change allowed Organization E to identify clear programmatic priorities, goals and objectives. At that point, we took the planning process down to the micro level, identifying specific activities, who was going to do them and when they were going to get done. In the process of talking through multiple potential pathways, Organization E was able to develop realistic strategies and objectives that took into account internal and external factors, and made it possible for them to achieve their goals.
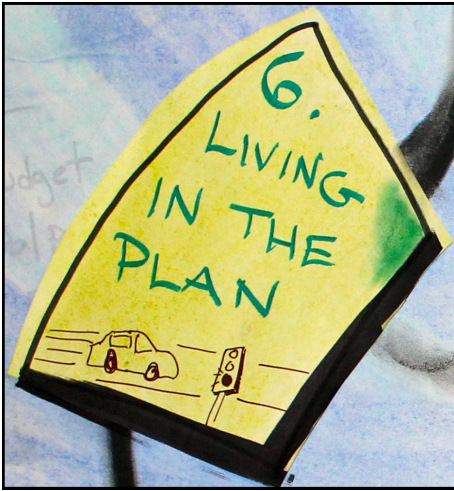
LIVING IN THE PLAN

This is where the rubber hits the road. Even when a fabulous process results in a beautiful plan, success is only assured if the organization carries the plan forward as a living document. A successful process should build an organization's capacity to think and act strategically, using the plan as a guide.

- **Celebrate!** Take a moment as an organization to mark the completion of your planning process – an accomplishment in its own right. Frame the celebration not as an end-point, but as an exhalation and call to action.

- **Plan for action!** You're not done planning until you know what will happen next. This might mean developing a detailed sequencing of actions or a looser framework, depending on your needs. The important thing is to have clear agreements about next steps, as well as who is responsible and accountable for implementing what by when.

- **Make the plan a presence**. Use posters and other visual cues to keep the plan alive throughout the organization: put the strategy filter above your desk; put the core values over the copier; bring the mission, vision and key strategic goals to all organizational meetings; start meetings by reading the values out loud.

- **Use the strategic plan to create alignment among staff.** All staff members should know the organization's broad strategic direction and understand how their own work fits in with the overall plan. The plan and its implementation should be regular topics at staff meetings.

- **Remember that the role of the board is Hi²Ho: *Head in, heart in, hands out.*** While the staff implements the plan, the board should:
  - Make sure the big picture (Mission, Vision, Values, broad Goals) stays on track
  - Ensure that there are ample resources for operations and that those resources are used responsibly
  - Support the Executive Director (through hiring, evaluating, responding and cheerleading)
  - Monitor plan implementation at a high level

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- **Carefully monitor progress.** The board should have a clear idea about what it is monitoring, why and when. It is not useful for the board to measure progress on a daily basis. Rather, working with the Executive Director, they should develop specific, relevant benchmarks and check in on them at regular, reasonable intervals, such as every 3-6 months. If targets are not met, the board should respond not with alarm, but with good, strategic discussion and an effort to deepen their understanding of the organization. Staff also play a significant role in monitoring the plan via clear benchmarks tied to workplans and set intervals for evaluation.

- **Stay strategic and nimble.** The external world will undoubtedly shift during the life of your plan. Respond strategically and thoughtfully to new opportunities and new challenges. Use your Guiding Ideas (Mission, Vision, Values) and strategy filters to amend the plan as needed. Just like your action planning distills your goals and objectives into specific actions and activities, your strategy filters will help you respond to new or unexpected ideas and opportunities, as well as threats, as you consider questions like "Should we go for this grant?" or "Does this new program idea really make sense?" Your strategy filter will help you make these decisions in the context of your overall strategy. Continue to practice strategic thinking even when there are not new things to address -- organize board meetings, staff meetings and organizational retreats around specific strategic topics.

- **Build your board and board committees around the plan.** Align board committees with strategic goals. Bring on board and committee members who have expertise and access to resources that will support the implementation of the plan. We have seen staff-board committees form effective teams that help to build relationship and mutual understanding while advancing the work.

- **Build in milestones to celebrate accomplishments.** Be intentional about celebrating your successes. Make sure to acknowledge and appreciate the hard work that made them possible!

- **Be ready to plan again!** When you are done celebrating the accomplishment of a completed plan, get ready to take the next step and plan again!

There is no guarantee that strategic planning will lead to the successful advancement of your mission. But by using this framework, your organization can be propelled forward with essential guidance for daily

operations and future decision-making. Your plan can channel your organization's energy and resources to realize its mission, rather than spin its wheels. The process itself can be galvanizing, creating positive momentum and more organizational focus and energy -- that is, strategic planning that is a boon, not a bust.

CASE STUDY:
Living in the Plan

Organization F had been through a series of leadership transitions, one consequence of which was significant mission drift. When two staff members took over as co-executive directors, we worked with them and a planning committee of program participants, board members, staff and community members to identify the organization's purpose, target population, goals and specific pathways for achieving those goals. The organization had several major unknowns, including funding and location, so we developed clear strategy filters and benchmarks for success that also had a significant degree of flexibility. Since Organization F completed their planning process, the executive directors have made the strategic plan a daily presence in their work, talking about it frequently, using it to make decisions, organizing board and staff work around strategic goals and deliberately moving forward on its path.

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