



ASSOCIATES

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Using strategic planning to ensure your organization's relevance

OR . . .

Making your nonprofit / NGO* stronger through strategic planning

* NGO (non-governmental organization) is the term typically used outside of North America.

Presented by Simone P. Joyaux, ACFRE • USA

Session description

Are you worried about your organization's future? Is your organization facing tough issues in a congested marketplace? Are you sure that your organization is still relevant?

Strategic planning could help. Effective planning is about assessing your organization, examining the community, making difficult decisions, and fostering learning and change.

This seminar provides you with printed resources and tips to design an effective strategic planning process. You will learn how to build ownership and understanding by involving your stakeholders in the process. You will learn what kind of information is useful to produce the best plan.

Please note

- This workshop focuses on strategic planning, not fundraising planning. Attendees should be able to influence whether or not the nonprofit / NGO does planning and what approach the nonprofit / NGO might use for planning.
- The materials in this document are copyrighted to me. And I give you permission to use them. You may photocopy, distribute, whatever.
- I do not provide you with a sample plan. My plans are too long and are owned by my clients. See sample strategic plans and fund development plans in my book, *Strategic Fund Development: Building Profitable Relationships That Last*.

Why are you interested in strategic planning?

1. Are you worried about your organization's future?
2. What are the critical issues facing your organization?
3. Does your organization meet community needs or is it out-of-date?

4. Are there other organizations doing similar work in your community?
5. Do your donors ask about the future direction of your organization and what its focus will be?
6. Does your organization need to make change to face the future?
7. How could strategic planning add value to your organization?

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Just a few resources

- There are many books and articles about planning. One example (but only one!) is my book: *Strategic Fund Development: Building Profitable Relationships That Last*. This book includes a detailed chapter on strategic planning – and links planning to other areas of NONPROFIT work, including fund development. **See my website at www.simonejoyaux.com.**
- See *Strategic Planning for Nonprofit Organizations*, John M. Bryson, Jossey-Bass.
- Read about systems thinking and learning organization theory. See Peter Senge and other authors. See suggested list on my website.
- See *The Nonprofit Quarterly*, www.nonprofitquarterly.org. This publication is one of the best in the sector to challenge your thinking, raise interesting issues, etc. See the article entitled “Making Change: How to Build Adaptive Capacity,” Winter 2003.
- Interesting resources – and you’ll find more on my website.

www.resource-alliance.org
www.efa-net.org
www.cafonline.org
www.dsc.org.uk
www.philanthropy.com
www.independentsector.org

www.cfre.org
www.fundraisers.fr
www.efc.be
www.ccp.ca
www.nonprofitquarterly.org
www.philanthropy.iupui.edu

www.afpnet.org
www.charityvillage.com
www.allianceonline.org
www.aherncomm.com
www.simonejoyaux.com

Vocabulary for this Workshop

Adaptive capacity: The ability of your NONPROFIT to regularly adapt and change in response to what is happening both inside and outside of your nonprofit / NGO. Highly adaptive organizations adapt in response to circumstances **and** generate or initiate change through their own creativity. See article: “Managing Change: How to Build Adaptive Capacity” by Carl Sussman, in the magazine *The Nonprofit Quarterly*, Winter 2003. www.thenonprofitquarterly.org. [This is a great article!](#)

Capacity: The ability to do something. *Organizational capacity* refers to the ability of your nonprofit to effectively carry out its mission.

Constituents: Also called stakeholders. Someone who relates to or cares about your nonprofit. Could be an individual, business, civic group, etc.

Infrastructure: The systems that support your nonprofit. This includes management, board (governance), marketing, fundraising, technology, etc.

Mission: Purpose or reasons for the organization to exist. David Packard describes this as “a group of people get together and exist as an institution...so they are able to accomplish something collectively that they could not accomplish separately - they make a contribution to society...” Purpose lasts for a long time and is only rarely fulfilled. However, it is important to regularly (e.g., every 5-10 years) test the validity of mission. Mission typically answers the following questions:

- Why is it important that your organization continue to exist?
- What would be lost if your organization ceased to exist?
- What is the end result if the organization exists? What is the product of your investment of time and resources?
- What are the basic means to achieve the end result?
- Who is the target audience and what is the geographic reach?

Organizational capacity: The ability of your nonprofit to effectively carry out its mission.

Ownership: Understanding and supporting decisions and directions. Sharing responsibility. Sufficiently committed to feel like an “owner.” Ownership happens when people have the opportunity to participate in critical parts of the nonprofit, for example, provide information, participate in discussion, and help make some decisions.

Philanthropy: Voluntary action for the common good. (Definition from Robert L. Payton, author and teacher of philanthropy in the USA)

Program: The services / activities that carry out your mission.

Process: Series of activities that take you to reach an end point. Course of action. Good process involves diverse constituents and develops shared understanding and ownership. Process takes time and can be uncomfortable.

Strategy / strategic: Long range, not routine. Complex and critically important. Strategic decisions, planning, and actions have a dual focus – paying attention to the internal and external environments of your nonprofit.

Vision: The picture of our desired future. Vision describes what we aspire to become, where we want to be and what we want to look like. Envisioning the future is a creative act often done during a strategic planning process. The resulting picture serves as the focal point for action. It often takes organizations multiple strategic plan intervals to achieve the vision.

Agenda and Notes

Topic	Resources
<p>1. What is planning? Planning focuses on learning change. Is your nonprofit ready?</p> <p>"Planning means changing minds, not making plans. [The best outcomes] depend upon the ability of a company's [leadership] to absorb what is going on in the business environment and to act on that information with appropriate business moves.</p> <p>"In other words, [good outcomes] depend upon learning. Or, more precisely, on institutional learning, which is the process whereby management teams change their shared mental models of their company, their markets, and their competitors.</p> <p>"For this reason, we think of planning as learning and of corporate planning as institutional learning." (<i>Arie deGeus, former director of planning for Royal Dutch Shell. Articles in <u>Harvard Business Review</u>, March-April 2988 and March-April 1997.</i>)</p>	
<p>2. Setting the context for strategic planning</p> <p>A. The community decides if your organization is relevant. Strategic planning is a process to assure relevancy.</p> <p>B. To be relevant, your organization may need to adjust its mission. So effective strategic planning tests your mission.</p> <p>C. The process of strategic planning should make your organization stronger. Effective planning develops your organization's capacity to adapt.</p> <p>D. The strategic plan is an outline of how you plan to move from where you are today to where you want to be.</p>	<p>See Carl Sussman's article about adaptive capacity, noted on page 2 of this handout.</p> <p>Handout, page 3, <i>Vocabulary definitions</i></p> <p>Handout, page 8, <i>8 key results produced by an effective strategic planning process</i></p> <p>Handout, page 9, <i>Diagram of strategic planning</i></p>
<p>3. Basic principles of effective strategic planning.</p> <p>"If I had an hour to save the world, I'd spend 55 minutes defining the problem." (<i>Albert Einstein</i>)</p> <p>A. Process is as important as the resulting plan. Good process produces understanding and ownership, and enhances a culture of questioning, learning, and change.</p> <p>B. Planning is not static, but rather ongoing.</p> <p>C. Planning is a process of self-examination.</p> <p>D. Involve your constituents in the planning process. They provide important information and you need their understanding and ownership of the resulting plan.</p> <p>E. Planning examines program and infrastructure.</p> <ul style="list-style-type: none"> • Infrastructure refers to all the systems and activities that support your organization's programs. For example: management, governance (the board), marketing, fund development, technology, etc. <p>F. Quality information is essential to support effective strategic planning.</p>	<p>See systems thinking business theory (Peter Senge and others).</p> <p>See Joyaux monograph <i>Choosing Your Road: Organizational Development Specialist or Just Another Fundraising Technician.</i> www.simonejoyaux.com/ Resources / Free Library / Fund Development</p>

Topic	Resources
<p>4. Involve your constituents</p> <p>A. Define who your constituents are and decide how they will participate in the planning process. For example: Who provides information? Who actually has a voice in decision-making? Who needs to be informed?</p> <p>B. Make sure that your planning process engages staff and the full board of your nonprofit / NGO.</p> <p>C. If you use a strategic planning committee, its authority and scope of work should be fairly limited.</p>	<p>Think about process as a way to involve your constituents.</p> <p>Think about nurturing relationships as you do in fund development.</p> <p>And remember: Your diverse constituents have important insights that can help your organization learn and change.</p>
<p>5. Using quality information to make quality decisions</p> <p>“It’s what we think we already know that often prevents us from learning. <i>(Claude Bernard, French physiologist)</i></p> <p>A. Quality information helps produce quality decisions.</p> <p>B. Quality information includes analysis of trends and implications – and is used to stimulate quality conversation.</p> <p>C. What kind of information does your nonprofit need to support good strategic planning? Where will you find this information?</p> <ul style="list-style-type: none"> • External trends / issues: global, demographic, social, work / workplace, science and technology, economic, business, government and regulation • Mission / program: community needs assessment, review of similar nonprofits • Capacity of your nonprofit: governance, management, fund development, marketing / communications, planning, etc. <p>D. Securing information to make quality decisions</p> <ul style="list-style-type: none"> • Primary research initiated by your organization, e.g., key informant interviews, focus groups, and surveys • Secondary research, e.g., reviewing existing information through Internet, publications, your own organization’s internal data, etc. • How much information can you afford (or not afford) to gather? What is the most useful information for your nonprofit / NGO? (Remember: The information gathering phase is the most time consuming and most expensive.) 	<p>What information will help you determine community needs?</p> <p>How will you learn about other nonprofits doing the same or similar work?</p> <p>What information will help you evaluate your nonprofit’s capacity to carry out its mission?</p> <p>See Joyaux book – and other resources – for more information about research and samples of surveys, focus groups questions, and key informant interview questions.</p> <p>See systems thinking and learning organization theory to learn more about conversation as a core business practice, and the difference between discussion and dialogue. See Joyaux book for an introduction to these concepts.</p>

Topic	Resources
<p>6. Key steps in an effective planning process</p> <p>“Everything will turn out all right – unless something unforeseen crops up.” (<i>Samuel Beckett</i>)</p> <p>A. Clarify your organization’s values. Values set the framework for planning and all of your work. (The challenge is to live the values.)</p> <p>B. Conduct a SWOT analysis (internal strengths and weaknesses, and external opportunities and threats). This helps you decide what kind of information you should gather to support the planning process.</p> <p>C. Collect and analyze the information. Identify the themes. Prepare a summary that is reviewed by all participants who attend the decision-making retreat.</p> <p>D. Convene your decision-making retreat.</p> <ul style="list-style-type: none"> • Who should attend your organization’s retreat? • At the retreat, discuss the implications of the compiled information. Talk about learning and change. • Define your vision and priorities for the future. • Provide a summary of decisions made at the retreat to all retreat participants. <p>E. Based on the decisions made at the retreat, draft the vision and goals. Then outline the strategies to move from today to the future that your organization wants.</p> <p>F. Review your mission and make adjustments if necessary. Remember: Your organization must be relevant – or it should go out of business.</p> <p>G. Draft the multi-year strategic plan. Secure formal approval, typically from the board.</p> <p>H. A quick tip: Throughout the planning process, provide regular updates to your key constituencies. Remember: You want to build understanding and ownership.</p> <p>I. Implement the plan.</p> <p>J. Monitor progress. Use the multi-year strategic plan to establish annual priorities and budget.</p> <p>K. As necessary, adjust the plan. But be careful. The plan provides your framework. Flexibility is important because things change. But too much flexibility compromises the plan and the planning process.</p> <p>L. Get ready to update and extend the plan.</p>	<p>Handout, page 9, <i>Diagram of strategic planning</i></p> <p>Handout, page 10, <i>Steps in the planning process</i></p> <p>See Joyaux website for PDF about conversation and strategic questions. www.simonejoyaux.com / resources / free library / board development.</p> <p>See handout, page 11, <i>Has your organization articulated its shared values?</i></p> <p>See handout, page 12, <i>Mission and vision</i></p> <p>See handout, page 13, <i>Major sections of the strategic plan</i></p> <p>The information you gathered during the planning process will help you implement the plan.</p>

Topic	Resources
<p>7. How do you use the multi-year strategic plan once you have it?</p> <p>“We are so busy doing the urgent that we don’t have time to do the important.” (<i>Confucius</i>)</p> <ul style="list-style-type: none"> A. The strategic plan guides all organizational activity. B. Develop management plans (e.g., fund development, communications, programs) based on the strategic plan. C. Expand staff performance appraisal to include their responsibility for progress on the strategic plan. D. Use the strategic plan as the template for staff, committee, and board meetings. 	
<p>8. What challenges might your nonprofit face with this type of strategic planning process? How will you overcome these challenges?</p> <p>“It will not do to leave a live dragon out of your plan if you live near one.” (<i>JRR Tolkien, The Hobbit</i>)</p> <ul style="list-style-type: none"> A. Sometimes organizations ignore critical issues – the “elephants in the room” or “the skeletons in the closet.” Why? Fear of conflict. Inadequate self-reflection to identify the most difficult issues. Reluctance on the part of certain individuals to discuss the issues and reluctance on the part of others to demand dialogue. B. Your organization may not be very good at questioning and dialogue. C. What challenges might you face and how will you overcome them? <p>“There is nothing more difficult to carry out, nor more doubtful of success, nor more dangerous to handle, than to initiate a new order of things.” (<i>Machiavelli</i>)</p> <ul style="list-style-type: none"> • But the end does not justify the means. • And the very best planning process encourages questioning, learning, and change. It just takes courage and perseverance. 	<p>See handout, page 14, <i>Challenges to planning</i></p> <p>Remember: Planning means choosing – choosing between one consequence of a decision or another.</p>

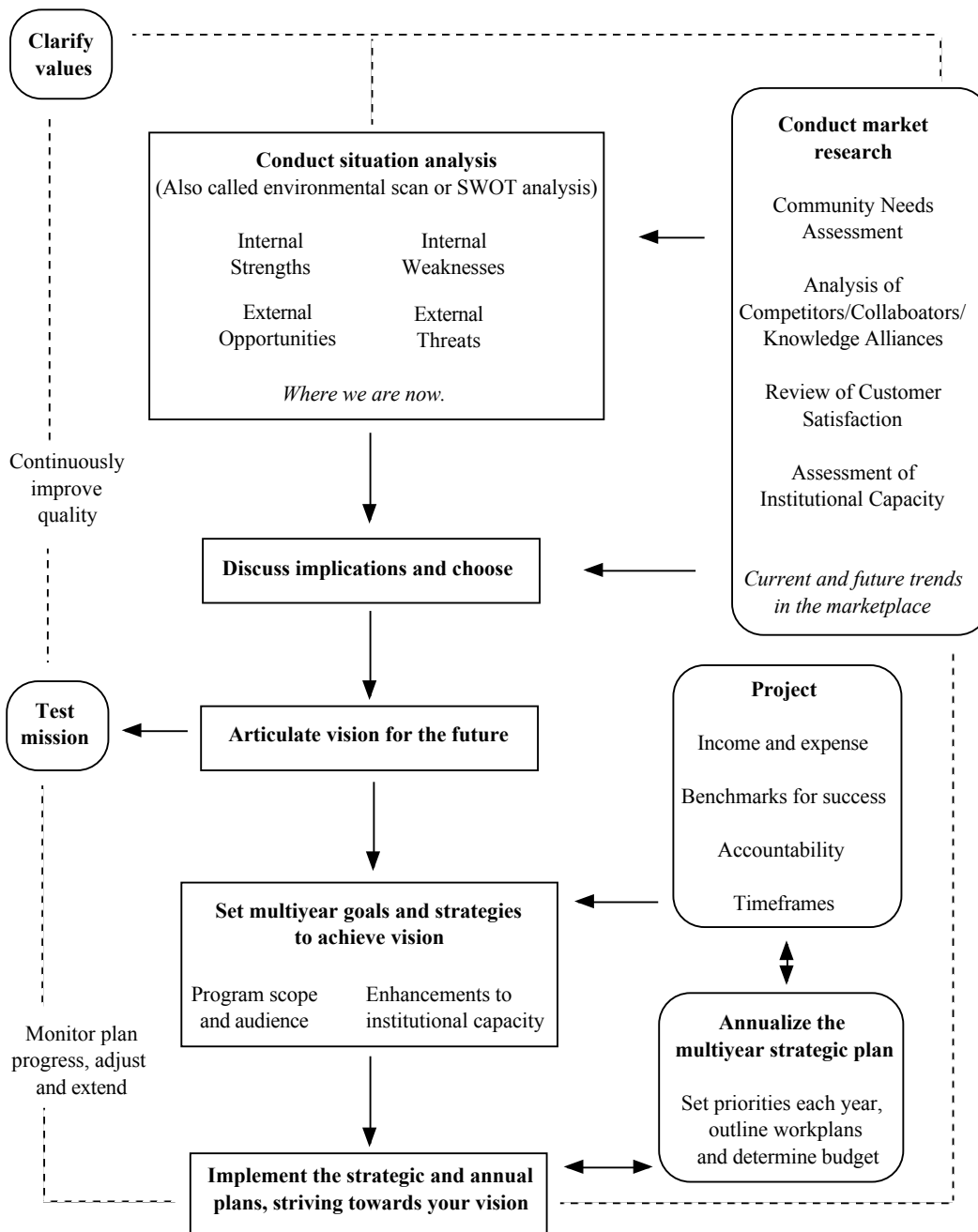
8 key results produced by an effective strategic planning process

1. Produces shared vision and direction of your organization and define how to get there.
 - a) Test validity of your mission and perhaps recommend adjustments or major change.
 - b) Define your direction.
 - c) Decide priorities and set limits.
2. Justifies your organization's existence in the community and clarify your organization's position in the marketplace.
 - a) Assess community needs.
 - b) Identify responses to meet those needs and gaps in meeting those needs so that your organization can choose what it will be and do.
 - c) Examine institutional capacity and capability to meet the needs.
3. Identifies constituents and build stronger relationships with them.
 - a) Identify new constituents.
 - b) Bring current constituents closer to the organization.
 - c) Build constituent understanding of community needs and your organization's response.
4. Builds an aligned, cohesive organization.
 - a) Engage the hearts and minds of those closest to the organization.
 - b) Produce positive experiences for participants.
 - c) Foster shared vision, ownership, and teamwork.
 - d) Bring key constituents closer together and give permission for others to move on.
 - e) Mobilize people for investment of time, money, and action.
 - f) Clarify roles and relationships and distribute workload.
 - g) Build cross-functional bridges.
5. Builds a learning organization.
 - a) Encourage pluralism and diversity.
 - b) Develop individual and team skills.
 - c) Foster flexibility within a general direction.
 - d) Encourage critical thinking and creativity.
 - e) Enable the organization to use its strengths for comparative advantage and to mobilize against threats.
 - f) Develop capacity to detect and respond to changes in the internal and external environments.
 - g) Create a forum for conversation, dialogue, and improved consensus decision-making.
6. Identifies cost of doing business and income sources.
 - Justify fund development and create case for support.
7. Sets benchmarks for success.
 - a) Define accountability.
 - b) Outline criteria for success and evaluation process.
 - c) Establish general time frames.
8. Produces the best planning process and written plan.
 - a) Create a visionary guide and practical governance and management tool.
 - b) Guide annual work plans and budgeting for staff, board, and volunteers.
 - c) Assign responsibility.
 - d) Support staff and board assessment.

(Described in detail in Joyaux book *Strategic Fund Development: Building Profitable Relationships That Last*)

The Strategic Planning Process

Dotted line represents the feedback loop and operates in all directions between all elements.



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A very detailed outline of steps in the strategic planning process

All described in more detail – with samples – in Joyaux book *Strategic Fund Development: Building Profitable Relationships That Last* (See Joyaux website: www.simonejoyaux.com.)

1. Formally agree to do planning. (The board must take this action and the CEO must be the leader.)
2. Engage key constituents in the planning process.
3. Get ready to plan.
4. Launch the process with board, staff, and planning committee.
5. Design the planning process, develop the market research outline, and conduct the research.
6. Articulate (or review) values.
7. Tabulate research results, analyze findings, and prepare findings report.
8. Design the decision-making process.
9. Discuss findings and determine implications.
10. Determine direction (or vision or priorities).
11. Review (and possibly adjust) mission.
12. Determine goals and strategies.
13. Identify core competencies and supporting structure.
14. Establish benchmarks for success (also called key performance measures).
15. Assign time frames and entities responsible for strategies.
16. Project costs and income sources.
17. Outline process to monitor progress of plan, evaluate performance, and extend plan for subsequent years.
18. Write the multi-year strategic plan, review, and adopt.
19. Annually review progress of the plan and identify priorities for the fiscal year, based on the multi-year plan. Then develop your annual budget.
20. Translate the plan into personal commitment. For example, include progress on the plan as part of staff performance appraisal.

Has your organization articulated its shared values?

Your organization's values set the framework for planning as well as anything else that the organization does.

1. What are values?

A value is an enduring belief that a specific mode of conduct is personally or socially preferable to another.

Individuals have values. These values guide our actions and judgments. Our values are the standards that influence us as we make choices among alternative courses of action. Value systems are relatively permanent frameworks that shape and influence our behavior.

2. Groups have values too.

The key is, the group must articulate its values. These shared values then provide the framework that guides the actions and judgments of the group (or organization).

Groups (and organizations) operate best through consensus and unity of purpose and action. This means that the individual's values must match those of the collective entity. This "values match" is essential to the health and effectiveness of the group and is essential to the well being of the individual participant.

Values "define the enduring character of the organization." (James C. Collins and Jerry I. Porras, "Building Your Company's Vision, *Harvard Business Review*, September-October 1996.) These values are nurtured for their own sake, as the foundation of the organization. As Ralph S. Larsen, CEO of Johnson & Johnson says, "We have [values] because they define for us what we stand for, and we would hold them even if they became a competitive disadvantage in certain situations." (Ibid.)

Articulating values is one of the most important things that a group (or organization) does. Too often, groups go forth, stating, "everyone knows what we value." All too often, conflict emerges – and it's a values conflict because that which was implied was not made explicit.

When groups get together to clarify values, each individual must participate actively in the dialogue, with candor and honest feeling. Each individual must decide if s/he can support each value. To produce consensus, ask, "Is there anyone in the group who cannot live with this?"

Value conflicts are inevitable in the process of decision-making. Sometimes, membership in a group or organization places constraints on individual values. When an individual is invited to join a group or organization, the group or organization must state its values up front. By joining, the individual agrees to subscribe to and support the group's / organization's values. Sometimes groups or organizations face conflicts between their own clearly articulated values.

3. Seven steps that define a value. [Louis Rath, following John Dewey. Values and Teaching.]

- a) *Prized and cherished*. A value is something you prize and cherish.
- b) *Publicly affirmed*. You must be willing, when appropriate, to publicly affirm what you value.
- c) *Available alternatives*. There must be the possibility of freedom, i.e., available alternatives.
- d) *Chosen intelligently*. A true value is chosen intelligently, after consideration of the consequences.
- e) *Chosen freely*. A true value is chosen freely, after considering the consequences.
- f) *Action*. A true value involves acting on your belief. The final test of a value is action.
- g) *Repeated action*. A true value involves acting on it repeatedly and with a consistent pattern.

Mission and Vision

1. Mission

Mission or purpose describes an organization's reasons for existence. David Packard describes this as "a group of people get together and exist as an institution...so they are able to accomplish something collectively that they could not accomplish separately - they make a contribution to society..."

Purpose lasts for a long time and is only rarely fulfilled. However, it is important to regularly (e.g., every 5-10 years) test the validity of mission.

To articulate your mission, begin by answering the following questions, with a large group of stakeholders in your organization. Then take the answers and draft a clear and concise mission statement. The board (or some other governance body) should adopt the mission statement.

- Why do you exist?
- Why is it important that your organization continue to exist?
- What would be lost if your organization ceased to exist?
- What is the end result if the organization exists? What is the product of your investment of time and resources?
- What are the basic means to achieve the end result?
- Who is the target audience and what is the geographic reach?

2. Vision

Vision is the picture of our desired future. Vision describes what we aspire to become, where we want to be and what we want to look like.

The dictionary describes vision as something seen in a dream; the power of imagination; and unusual discernment or foresight.

Envisioning our future is a creative act. The resulting picture -- unrealized dream -- serves as the unifying focal point for action. This is where we want to go. This reflects our hopes and aspirations.

James C. Collins and Jerry I. Porras ("Building Your Company's Vision," *Harvard Business Review*, September-October 1996) talk about this envisioned future in terms of Big, Hairy, Audacious Goals. These BHAGs may only have a 50-70% probability of success, but the organization believes and plans to try.

Major sections of the written strategic plan

A written plan is the result of a strategic planning process. The written plan is a management and governance document. The document is used to ensure implementation and accountability. The document should adequately describe the process and the decisions; and, should clearly articulate the goals and strategies to obtain these goals.

(You will, likely, also need a communications document to present your plan to key constituents. You can create an executive summary to present your vision and major activities.)

The written plan should be understandable to community people who did not participate in the planning process as well as useful for future members of the organization who may examine the plan next year or in ten years.

Recommended sections of the comprehensive institutional strategic plan:

1. Organization's name, contact information, and date the plan was adopted by the board.
2. Brief history of the organization plus a description of why you decided to do planning. You might also wish to briefly describe the critical issues facing the organization.
3. Brief description of the planning process and the research methodology. The actual research results are presented as a separate information package, which is referred to in the final plan but not included.
4. Restatement (or revision) of mission.
5. Statement of values.
6. Description of vision for the future, your strategic direction.
7. Program and infrastructure goals.
8. Specific strategies, entities responsible and time frames to carry out each strategy. (Remember, this is not the staff or committee action plan. These are general strategies to achieve the overall goals.)
9. Description of resources necessary including financing and staffing. For some organizations, it also may be useful to outline the core competencies required to achieve the vision.
10. Some organizations include within the plan, their benchmarks to measure when they have achieved their goals. Other organizations establish benchmarks on an annual basis, as a technique to focus priorities for each year.
11. Description of the financing for the plan. Some organizations prepare multi-year financial projections for the length of the plan. Other organizations write a narrative description of financing issues and then prepare a budget annually.
12. Description of how the plan will be monitored, performance evaluated, and the plan extended. (It may well be that the organization has not yet achieved its vision by the time the 3-5 year plan is concluded. The next plan would continue to work towards the same vision.)
13. Calendar of key dates / major timeframes, often done by quarter of a year

Challenges to implementing the plan and achieving the vision

“To pursue the vision means to create organizational and strategic alignment to preserve the core ideology and stimulate progress toward the envisioned future. Alignment brings the vision to life, translating it from good intentions to concrete reality.” (*Built to Last*, James C. Collins and Jerry I. Porras, HarperCollins Publishers, NY, 1994, page 221)

“The essence of a visionary company comes in the translation of its core ideology [core values and purpose] and its own unique drive for progress into the very fabric of the organization – into goals, strategies, tactics, policies, processes, cultural practices, management behaviors, building layouts, pay systems, accounting systems, job design – into *everything* that the company does. A visionary company creates a total environment that envelops employees, bombarding them with a set of signals so consistent and mutually reinforcing that it’s virtually impossible to misunderstand the company’s ideology and ambitions.” (*Built to Last*, James C. Collins and Jerry I. Porras, page 202)

Tips to Remember

Planning does NOT stop once you adopt a plan.

Planning is an ongoing process of observing, assessing, asking questions, listening and learning. And changing. That’s the way to do business if we want to survive.

Make the plan real.

Everyone - board, committees, staff - use the plan as the basis for discussion, decision-making, budgeting, and all activities.

Balance flexibility with holding our feet to the fire.

New opportunities and challenges may come up while we implement the plan. We will have to be aware of these. We may have to (or want to) alter some of our priorities in the plan. But we will do this with caution, using all we learn.

Challenges to Implementation

1. Where are you going as an organization that is different than where you have been?
 - What are the most important changes represented in the new vision and direction?
 - What are the most difficult changes, but not necessarily the most important?
2. What additional information do you need to help implement the plan and achieve your vision?
3. What will you have to do differently to achieve your vision?
 - What will be most difficult to do and why?
 - What will be most difficult to change and how will we change?
4. How will this vision and strategic plan alter the work of the board, its committees, and staff? How will you translate the plan into personal commitment and action?
5. How will you make sure that your key constituents (e.g. donors, volunteers, members, users, etc.) understand and participate in your vision and direction?
6. How will you know if you are on track with your plan? What strategies will you use to monitor progress?
 - How will we hold ourselves accountable?
 - What kinds of questions should we ask?
 - What are our benchmarks for evaluation?
 - What kind of ongoing assessment will we do?

Interesting quotations about learning and change

“We tend to fall in love with the things that we think are true... You can’t unlearn anything. Most of what organizations call ‘unlearning’ is superficial – just slapping a new label on an old can of beans.

“We are what we experience and learn. We learn how to view the world and make sense of it.

“What we learn makes us who we are. We can’t unlearn that. The learning process helps us gradually, and usually unconsciously, compose an internal mode of reality – our perspective.

“Unfortunately, perspective is a fun-house mirror: It distorts and discolors everything we see, learn and experience...

“When external events – the world around us -- change and no longer fit our internal model, we start to blunder. Life gets messy. We become confused, stressed, and anxious. Rather than alter our perspective, we try to force others to conform to it...

“We can’t discard mental ‘stuff’. But we can create a mental attic and put a sign on the door that says ‘Things I know that are no longer so.’”

“Call all those old, best-loved ideas into question. Until you understand your thinking about a certain thing, you’ll never change it.

“So question that habit of mind, and lug it into the attic if it’s no longer useful. Don’t try to get rid of it; just refuse to dwell within it any longer.

“Change is not about understanding new things or having new ideas; it’s about seeing old things with new eyes – from different perspectives. Change is not about reorganizing, reengineering, reinventing, recapitalizing. It’s about reconceiving! You create a whole new order. Do that, and creativity will flood your mind.” (*Dee W. Hock, Founder and CEO Emeritus, VISA International*)

Meditation #1, Choice: Every morning a gazelle wakes up. It knows that it must run faster than the fastest lion or it will be killed. Every morning a lion wakes up. It knows that it must outrun the slowest gazelle or it will starve to death. It doesn’t matter whether you are a gazelle or a lion: When the sun comes up, you’d better be running.” (*Source unknown*)

“The more success you achieve – either as an individual or as an organization – the more difficult it is to change. All of the learning that led to one kind of success becomes implicitly coded and works against your ability to unlearn.

“The challenge then becomes how to uncover those deeply ingrained assumptions. One way is to create what I call knowledge ecologies – to cultivate diverse opinions and skills...” (*Fast Company, July – August 1999. John Seely Brown, Chief Scientist, Xerox Corporation, Palo Alto, CA*)

“Real learning and change require you [and everyone] to become a participant-observer in your own environment... Thinking creates the structures that create an organization’s behavior. Learn how to rethink, and you start to change.” (*Chris Turner, Consultant, Cambridge, MA*)

“Consider this: Every second, the Web grows by 17 pages and, according to some sources, the world has generated more data in the past 30 years than it did in the preceding 5,000 years.

“The challenge then is not only to learn what you need to know but also to *unlearn* what you no longer need. That means eliminating the habits, practices, and assumptions that once worked – even those that may have accounted for past successes – to make room for new methods that better fit your new circumstances.” (*Anna Muoio, “The Art of Smart,” The Fast Company, July-August 1999*)

A view of planning:

1. **Core values** provide the organizational foundation and hold people together.
2. **Complacency** is death.
3. **Information** is power.
4. **Diversity** is strength.
5. An effective planning process **tests mission** and defines identity.
6. **Those who show up decide.**
7. Planning is **learning** – and learning is **change**.
8. Define what’s **sustainable** – and then manage growth.
9. Build **organizational capacity**.
10. Pick **the right people** and build the right team.