

What is planning? The process to assure relevancy.

1. **Core values** provide the organizational foundation and hold the ranks together.
2. **Information** is power.
 - a) “The future is here today. But we have to learn to see it. The future leaves tracks in the present.” Harold (Bud) Hodgkinson
 - b) Ask the right questions. Gather quality information to support decision-making. Examine the information, its trends and implications. Talk about what all this means. Then decide. Deciding means **choosing the consequences**, both intended and unintended.
3. **Diversity** is strength.
 - Engage stakeholders. Document and communicate process. Communicate *what* and most especially *why* and explain *how* and *when*.
4. An effective planning process tests your mission and defines your identity.
5. **Those who show up decide.**
 - a) Board and key staff examine the information and make the decisions.
 - b) Your chance to talk is the invitation to attend the decision-making retreat. If you don’t attend, you lose your chance to talk. And if you are silent at the retreat, silence is consent.
6. **Planning is learning** – and learning is change.
 - a) Planning is an ongoing process filtering through every area of the organization always.
 - b) Learning is talking together and doing.
 - c) Teach people how to talk together and think together and learn together. Make everyone a teacher.
 - d) What have we learned and what must we learn? What are the minimal learning requirements for people in this organization? How will we keep the plan and process and learning alive while **implementing**?
7. **Complacency** is death.
 - a) What major changes have to happen to move the organization forward?
 - b) Define what will make our organization highly innovative, supportive of change, and cutting edge to function effectively in the future.
8. Define what’s **sustainable**. Manage growth.
9. **Build organizational capacity.**
 - What are the **processes, systems / protocols, skills, technology, and alliances** that the organization needs to do the work it chooses to do? For example: governance and management structures and systems including committees; individual and group competencies; collaborations; and other issues related to infrastructure.
10. **Pick the right people** and build the right team.
 - a) Get the right people on the organizational bus and in the right seats. Get the wrong people off the bus. Staying on the bus means supporting decisions made by the group and adding value according to the decisions made by the group. It’s okay to move on.
 - b) To stay on the bus, identify how each individual can contribute to the future. Define commitment, performance and boundaries. Behave accordingly.
 - c) And good planning will encourage some people to leave because they do not agree with the decisions.