ASP NONPROFIT CENTER FOR EXCELLENCE

FIRST MONDAYS DISCUSSION

TOPIC: What does quality programming look like?

DATE: MONDAY, APRIL 3, 2017
First Mondays, April 3, 2017
Topic: What does quality planning look like?

Please click here to access the recorded discussion.

Discussion Background:

The February First Mondays discussion about how to lead a thoughtful, effective strategic planning process with a nonprofit ended just as we were delving into some provocative questions about leading a planning process with organizations that have limited experience with or understanding about what a quality planning process looks like. People don’t know what they don’t know. We’re devoting the April discussion to exploring the issue of how to educate the nonprofit community about quality in strategic planning.

- What should the facilitator’s role be in educating an organization about effective strategic planning and planning practices?
- How do you help organizations define their planning needs, and identify the best methods for structuring the process, to ensure they end up with a high quality, effective plan?
- Have you worked with an organization that approached the planning process guided by outdated or mis-guided thinking about how it should proceed? Were you able to change their thinking? How?
- The data and information gathered and analyzed to inform planning is critical to the quality of the discussions that guide development of effective strategy. What do you do if you recognize that the intellectual rigor of data/information gathering and/or analysis behind the development of a strategy is weak or flawed?
- How can ASP further expand on its research around successful practices in nonprofit strategic planning to help raise the bar of these practices?
- Participation in First Mondays is free but registration is required to participate. Please follow (link) to reserve your “seat at the table” to join us for this thought-provoking discussion. You will receive an email with connection information to join the conversation the day of the discussion.

Notes:

How long does it take to do pre-planning work: (6-9 months is typical)

Wrong time to plan:

- When the Executive Director(ED) has left or is planning to leave.
  People shared different experiences with planning conducted when an ED is leaving, or has already left the organization. Some have seen the plan become an effective vehicle to help in hiring the next ED—the organization’s direction and operational approach were clear and helpful to the new leader. Others have seen the situations where the plan and the new leader’s vision for the organization were in conflict and the plan was thrown out, or it became a source of chaotic, unfocused implementation that actually hurt the organization.
- In time of financial crisis:
  Generally agreed that this is not the time to create strategic plan. Create a plan to address the financial issues. When those have been solved, consider financial problem

Planning should be pro-active.

One group shared how they begin by considering where each service line or facility wants to be in 12, 24, 48 months. Plans are built for each, focusing on overall improvement or reaching something new; these
goals are aligned with system-wide strategic objectives. Dashboard reports created by a Project Management Department are used to report out to each service line/facility and to executive staff of the organization every six months.

In this organization, the planning process had involved facilitation of a day long “retreat” involving 100 people. Feedback they received indicated that people felt this was too long, the large group format made it difficult for more introverted participants to feel comfortable speaking up; recognized that having a large number of people in the room didn’t mean they had the right people engaged in the planning discussion. They are shifting to process through which they gather feedback/conduct an environmental assessment with via surveys and interviews with facility/service line leadership and personnel; review reports, research. This information is presented to a smaller, more focused planning group who then break into smaller groups for one hour to identify short, medium and long term goals and define potential indicators of impact. This information is used to create a draft plan that is reviewed and refined by the core planning group. The approach is new but the hope is it will allow them to gather feedback more effectively, and establish a more efficient, less burdensome planning process.

- **Planning in a large organization:**
  Creating a planning team can be especially helpful. Some organizations involve staff in selecting the representatives to participate on the planning team. Sometimes by simple nomination, other times by actual vote.

- **Gathering Information**
  Several discussion participants emphasized that it is important to look for various methods/venues for gathering information from staff for a planning process. (Surveys, interviews, focus groups) Information gathering should be ongoing, and not something that only happens as part of a planning retreat.

  Circling back with a summary of input/feedback is essential. Several discussion participants pointed out the frustration they have heard from staff who are asked to participate in this effort, but never hear about the results or see that action is taken to address issues/concerns. It ok to talk about what isn't working!

- **Helping organizations define their plan needs:**
  SWOT analysis can help frame where the weaknesses are; what areas need attention;

  One discussion participant suggested that is most helpful to come into a planning discussion with something for people to react to—rather than a “blank” slate. This required understanding their preferences- what do they want? What is their culture?

  Using a basic template customized to their unique needs can be effective.

  Identification of organizational culture issues is an important part of early planning process. It allows you to address those issues in both the design of the planning process and in the content of the plan itself. Some organizations conduct culture survey as part of pre-planning.

- **Defining accountability**
  One of the biggest stumbling blocks to plan implementation comes from not identifying accountability. As one participant said, you don’t want to hear staff say: We don't know what is going on.” When reporting accountability and responsibility is unclear the plan itself is unclear and unlikely to be successful.
NOTE: If you are interested in facilitating these or other topics as part of 1st Mondays please reach out to Denise McNerney (dmcnerney@ibosswell.com) or Lynne Brown (lbrown@ibosswell.com). Having additional voices engaged in the facilitation of these discussions is a 2017 goal for the Nonprofit Center for Excellence.