ASP Nonprofit Center for Excellence - First Mondays Discussion

Date: March 7, 2016

**TOPIC:** Alternative Planning Methods

To access the recorded discussion, please [click here](#).

**NOTES**

What alternative planning methods do you engage with?
- Decision tree analysis? Scenario planning? Strategy mapping? Fishbone Diagram (Cause & Effect diagram)

Note: Consider the different levels of planning you may be doing, and how different approaches/techniques work in different settings.

What levels of planning do you engage with?
- Business model planning?
- Business planning?
- Annual planning?
- Departmental/unit planning?
- Project planning?
- Feasibility studies?

**Initial Info Gathering:**
Start by asking about their previous plan/efforts – what is working/not working....
- Ask about this individually – as well in full group...
  - Individual first works well – to provide facilitator insights prior to planning session
- Nominal group process
  - Helps to identify issues
  - Also use for prioritization processes

**Identification of Key Issues:**
- Research – megatrends/trends – then assess how they might affect our work
- Interview key stakeholders
  - Identify common threads/trends
- SWOT/PEST analysis – gather input across stakeholders (in advance)
  - Identify common threads/trends
**Prioritization:**
- Power Noodle/ Many Moons/ Group Mind – for asynchronous conversations
  - Provide methods for working virtually
  - Need to consider security, as well as simplicity, budget, etc.
- Note: whatever you can capture in advance is best – thus allowing you to maximize the actual meeting time for discussion, decision-making, agreement, etc.
- In-the-moment tools: “check vote” N/7; dot voting – e.g. given 10 dots (ok to use more than 1 dot for top choices…)
- Ranking – initial data generation may not always be the final consensus – thus, it is a good practice to “re-vote/re-rank” after the discussion (since folks’ minds can change through the discussion…)
  - Criteria for ranking/voting ---
    - How do we come up with the decision-criteria?
      - Mission/key strategic objectives alignment
      - Is the voting driven by – overall mission-impact or more around timing/sequence, and/or capability/capacity of organization…
      - Varies by group, timing in the process, budget priorities, etc.
    - Check out: *Thriving in a Stakeholder World: Purpose as the New Competitive Advantage by Paul Ratoff*
    - Consider weighting
  - Consider taking results and making a strategy or results map
  - Maximize the opportunity for conversation
    - In follow up to this – can then send out recommendations to folks to:
      - Confirm level of agreement
      - review/re-rank/suggest edits, etc.

**SUGGESTIONS for Future First Monday Topics**
- Engaging volunteers (beyond board of directors) into strategy development –
- Differentiation between strategy development, deployment (alignment of resources, etc./), and execution
- Please submit additional ideas to:
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