



Strategy Setting in small NFP community organisations

A good many small to medium not-for-profit organisations feel overwhelmed by the thought of strategic thinking. Some may see it as a 'corporate' thing, others may feel they do not have the resources or funds to justify retaining a skilled facilitator. Often these fears mean there is little forward planning done at all.

When we fail to plan ahead we increase the risk to our organisation. Resources may be wasted, the organisation may fail to achieve its mission and in some instances the organisation may have to cease operations.

The good news is that it doesn't need to be like this. Strategic planning can be easily done in house. There are benefits in retaining a knowledgeable consultant but its not essential to your planning process.

Strategic planning is just like any other planning process - it's a conversation between key stakeholders.

Strategic Planning Phases

1. Determine planning process
2. Appoint facilitator
3. Invite stakeholders
4. Send out pre-reading/surveys
5. Understand environment
6. Identify Vision, Mission, 'id'
7. Set direction, goals
8. Set key actions, outcomes
9. Prepare plan
10. Implement, monitor, report progress

We recommend appointing an independent facilitator - someone who is not required to be a part of the conversations - the facilitators role is to ensure the planning process is followed, keep people focused and on track, write notes on flip charts . . . *Also* appoint a separate note taker. This leaves the facilitator free to concentrate on keeping everything flowing along.

Share stories, create a learning environment, have fun

Case Study: A Lifeline group in Victoria invited the board members, staff, volunteers and external stakeholders to a 'cafe conversation', where tables were decked out as in a cafe, different topics were introduced for discussion, people changed tables for each conversation. Great stories were told and the Board was provided with a stakeholders perspective of community needs. The Board then used that information to guide their strategic planning discussions.

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Goal Setting

It is preferable to set 2-3 important goals and achieve them; rather than set 5-6 goals and achieve few or none at all. You can always review your plan, at any time and reset goals to reflect your new situation.

When setting goals avoid substituting the outcome or the activity for the goal. For example;

THE CASCADE OF STRATEGIC CHOICES:



Goal: To increase revenue from bequests
Outcome: Will generate sustainable, long term revenue
Action: We will develop a bequest program

In this example, the goal is specific and its clarity provides direction for future activities. The outcome is the impact of achieving the goal and the action, which could be confused with the goal; is not the goal.

Values V Doing Stuff

At the heart of any community organisation is a set of values, (and morals, ethics, beliefs) that drive service delivery. These values are essential, they form the 'id' or identity of your organisation. They are the things you want others to see in you. Your challenge is to not confuse values with outcomes. You remain relevant to the community when you do stuff, when you add value to the community and when you make a difference. When you put your own values forward first you may be neglecting the needs of the community.

The best strategy is to work backwards - identify what it is the community needs are and then guided by your values, determine how you want to meet those needs, now and in the future. In this way you move your organisation forward, you do not stand still, you meet the needs of the community; as seen by the community, you remain relevant to the community and you enjoy the communities support.

Many community organisations set their Vision and Mission some time in the past. In the meantime the world has moved on and changed. Do your Vision and Mission actually reflect the needs of the community, today and tomorrow or do they continue to reflect the values of past founders?

Values draw people to your organisation, as board or committee members, volunteers and in some instances, as employees. At the same time these people want to make a difference, they want to make the world a better place for others. Do your Vision, Mission and Values continue to draw new, younger people to your organisation or do they act as a barrier?

A simple test of your strategic plan

1. Am I satisfied all readers of the plan will clearly understand it?
2. Am I satisfied that the strategic/business directions proposed are aligned with our Vision, Mission, Values, Constitution and Rules?
3. Am I satisfied the strategic/business directions proposed are of a nature and quality that should ensure the future sustainability of our organisation?
4. Am I satisfied that all strategic directions have been properly considered, that implementation is possible and that goals/outcomes are practical and achievable?
5. Am I satisfied that management accountability is clearly defined, we are well resourced and able to implement this plan and we can take remedial action in event of shortcomings?