



On more than one occasion while working on strategic plans, I have been accused of “liking it too much.” Good planning is in my DNA.

My Experience with Strategic Planning

I have played many roles in strategic planning processes, including consultant, Executive Director, coalition leader, planning committee chair, and board member.

- As a consultant, I have facilitated strategic planning processes for organizations facing a variety of challenges at different stages in their organizational life cycle.
- As an Executive Director, I staffed four OLCV/OLCV-EF’s strategic planning processes, including writing the plan for two of those processes.
- As a coalition leader, I led the effort to adopt a strategic plan for the Oregon Conservation Network, a coalition of nearly 40 Oregon environmental groups with a coordinated strategy of influencing the Oregon Legislature.
- As a board member of the League of Conservation Voters (2007-2009), I served on its strategic planning committee for the development of its 2009-2012 plan. As a board member of the Federation of State Conservation Voter Leagues (1997-2007), I twice chaired committees that generated long-term strategic plans.

My background is particularly well-suited to helping state and regional organizations

- I have experience running an organization at the \$200,000 1.5 FTE staff level and the \$1 million dollar 10 FTE level, and all stages in between. Having walked in the shoes of an Executive Director, I understand the particular challenges and opportunities strategic planning presents to a busy executive.
- Having served as chair of a board strategic planning committee, I understand the challenge facing board members who must assert their important role in strategic governance, while maintaining the appropriate division of roles with staff.
- As a facilitator, I am particularly adept at keeping a group on topic, within time constraints.
- Having worked with organizations of different sizes, cultures, and in very different situations, I recognize there is no one path to success. I look at situations in a non-judgmental way, helping organizations figure out their best course given their lay of the land, competencies, and values.

- Having spent most of my career raising money, I understand the importance of ensuring your programs are fundable and your fundraising is tied to strong programs.
- I am willing to do it all: stakeholder interviews, writing up the results to frame the issues, prepping for the retreat, facilitating it, and writing the strategic plan.

My Approach to Strategic Planning

- Good strategic plans make their assumptions explicit. I prefer to call this section of the plan “Strategic Assumptions.” Some of these assumptions will be facts about the world that the plan must take into account (the “lay of the land”). Others will form a “theory of change” about why certain organizational activities will lead to desired outcomes. In most circumstances, it is best for a committee or staff to draft the Strategic Assumptions for the full board to react to, rather than brainstorming them from scratch during a planning retreat.
- In strategic planning, organizations should identify:

Goals	• The change in the outside world the organization is trying to achieve.
Strategies	• The methods used to achieve the goals.
Objectives or Benchmarks	• Measurable ways to determine whether the goals or strategies are achieved.

For some clients, laying out these goals, strategies, and objectives will be a main focus of the planning retreat. For others, they may be developed ahead of time by a committee and the retreat will grapple with other big decisions facing the organization (mission, vision, values). Still others may come into the planning process with goals/strategies/objectives fairly well set, and will wish to spend more time working on the nuts and bolts of prioritization, resource allocation, and timing out new programs and tactics.

- Boards work best in strategic planning when grappling with a smaller set of defined “issues” with legitimate options to consider, rather than having very wide open abstract conversations. To avoid abstract discussions, the board’s strategic planning committee should review stakeholder research and identify the significant issues facing the organization. Where appropriate, a board packet should be created that provides background information about those issues and potential options so that there is structure to the board’s deliberations.¹

¹ Occasionally, with newer organizations or those undergoing significant change, mission-focused strategic planning is essential. However, in those cases, I recommend a separate mission focused one day retreat, with a separate goals/strategies/objectives retreat a month or two later.

- Effective strategic plans prioritize. Given resource constraints, what's most important? To do that, the planning process ideally should present to the board and staff an evaluation of the organization's existing strategies/programs and fundraising, along with information about new strategies or fundraising tactics being considered. Prioritizing within the strategic plan, based on good information, dramatically eases the job of the Executive Director and board when subsequently drafting budgets and work plans.

Typical Process

There is no one process that works for every organization.

Rather, when invited to submit a proposal, I will discuss what you want to get out of the process and tailor a proposed process to your circumstance. If invited to develop a contract, we will work together to refine my proposal into an agreement that outlines the specific steps used in the planning process and who will be responsible for each step.

Most processes will follow the path in the following chart. The number of days in this chart refers to the number of days of *my* professional services required. A typical medium sized organization wishing to do a thorough planning process may require from 10-12 overall days. Newer organizations with very simple planning processes may be able to utilize a process with as few as 3 days of professional services. Very larger organizations could conceivably use as many as 18-20 days of my time.

