



Why Organizations Thrive – Lesson 3: Plan, plan, and then plan some more
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I'm in the process of writing a long article entitled: *Why Organizations Thrive*. The article details fifteen lessons I learned while growing the Oregon League of Conservation Voters (OLCV),¹ buttressed by my observations of dozens of other groups both in Oregon and across the country.

Collectively, I believe these lessons are a very useful set of principles that Executive Directors can use to improve their organization's capacity to fulfill its mission.

Very astute readers of this series may have noted that I jumped from July Lesson 2 (Relentlessly focus on relationships) to August Lesson 4 (Evaluate, evaluate, evaluate).

What happened to Lesson 3? I wasn't satisfied with Lesson 3, so I put it aside to let my thinking marinate.

Lesson 3 is: Plan, plan, and then plan some more.

The importance of planning shouldn't be surprising to anybody. But in my experience many organizations are overemphasizing strategic planning and underemphasizing operational planning.

Most nonprofit organizations I talk to have a strategic plan, or at least acknowledge the desire to have one. At its core, strategic planning asks "Who are we? Where are we going? What should we be doing? How will we do it?"

Different consultants will use different terms (mission, vision, values, goals, strategies, objectives). What matters is not so much which terms you use, but that everyone in your organization uses consistent terms so that you can communicate internally.

Working without a strategic plan brings to mind a favorite exchange from Alice's Adventures in Wonderland, when she first meets the Cheshire Cat.

Alice: "Would you tell me, please, which way I ought to go from here?"

Cat: "That depends a good deal on where you want to get to," said the Cat.

"I don't much care where," said Alice.

"Then it doesn't matter which way you go," said the Cat.

¹ I served as OLCV's Executive Director from 1997-2009. During that time, we grew from a permanent staff of 1.5 to 11, and a budget of around \$200,000 to more than \$1 million.

Yet, knowing where you want to go is a far cry from having a well-designed effort to get there.

A few weeks back I was talking with a fellow strategic planning consultant and he noted that one of the biggest challenges he has experienced is that organizations (whether for-profit or nonprofit) always underestimate the amount of time and energy it takes to do good strategic planning, so out of exhaustion and a pent up to-do list they skip or skimp on work planning.

The very next day his point was proven to me: I was talking with the Executive Director of a client and asked to see their strategic plan and any work plans they had adopted. She sent me the strategic plan, but told me they were so busy when the strategic planning process ended that they just dived in and, with the exception of one staff person, had no work plans.

This brought to mind one of my favorite sayings – allegedly by The Buddha: “There is so much to do, you must move very slowly.”

The number one value of planning isn't in deciding what you're going to do, it's in crossing off the list all the things you're not going to do. When you're really busy is precisely the time when it's most important to stop, plan, and absolutely avoid activities that aren't essential.

In my experience, groups that carve out the time to adopt operational plans for specific programs or functions are far more likely to thrive than those who don't.

They are more likely to stick to clear timelines. Their staff has more clarity about its roles and responsibilities. They are less likely to stray into low payoff activities. They are more likely to learn what works and doesn't work. And they are better at evaluating and boosting the performance of their staff.

Whether on the resource development side (fundraising) or program side (mission-related activities), operational plans are invaluable.

So how does an organization adopt a culture that gets beyond just adopting a strategic plan and into one where planning is part of its DNA.

The easy answer is it starts at the top with the Executive Director and board leadership. The Executive Director must lead by example with his or her own work planning.

But here are some additional ideas:

When you get ready to do strategic planning and lay out a timeline and budget, don't let that timeline and budget end with the adoption of the strategic plan. Incorporate additional staff time to develop work plans either by function, program, or at the individual staff level.

Conduct one significant planning project every year. Examples might be: a long-term technology plan, an organizational communications plan, or a long-term development plan. Plans like these always take more staff time the first time you create them, so don't roll out more

than one of these in any given year. Stagger them so that they don't expire in the same year.

Reward staff for planning. Evaluate staff performance in part based on whether they achieve the measurable objective of completing timely and solid work plans around specific programs and tactics. When one of your staff develops a format and plan that's particularly well done, share it with others as an example.

Lastly, don't let perfection become the enemy of the good. It's far better to do some decent planning than to wait for the stars to line up for you to create the perfect plan. Dive in.

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