



# How Can Your Board Participate in Strategic Planning?

A new, tested approach is the answer.

By Doug Eadie

Your organization has a choice in today's changing, challenging world. You can build the capacity to manage your own change, fashioning strategies to capitalize on opportunities and avert threats. Or you can circle the wagons in hopes of protecting your organization's status quo from the changes swirling around you.

The siren song of comfort and security will always tempt you to go on the defensive in the face of change, but you know that's not a viable choice. Your organization's long-term survival and growth depend on mastering the change challenge. Merely defending yourself would be a recipe for sure decline—perhaps even extinction if the changes around you are truly strategic (for example, a sister nonprofit with abundant resources going after a large chunk of your market).

## What's Wrong with Strategic Planning?

I tend to avoid the term “strategic planning” for two reasons. First, there's no such thing as *the* strategic planning process: It can mean a hundred things to a hundred different people. Second, the process as traditionally applied has earned a deserved reputation for ineffectiveness in leading strategic change.

The problem with traditional strategic planning—sometimes called comprehensive long-range planning—is that it tends to project everything an organization is already doing into the future, often for a mean-

ingless, arbitrary period such as three or five years. This approach often results in mounds of conventional wisdom that eventually make their way to dusty shelves, where they're rarely consulted.

Fortunately, a strategic planning variation, customized to deal with strategic change, has been developed

and thoroughly tested. This new tool is called the strategic change portfolio. At last you have a powerful vehicle to involve your board creatively in leading strategic change.

## The Portfolio Approach at a Glance

The strategic change portfolio is essentially a “holding pen” for proj-

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ects developed to address issues that the board and CEO have selected for attention *now*. Each of these projects—often called strategic change initiatives—consists of goals, along with the strategies and budgets to achieve those goals.

At any given time, the initiatives in the portfolio will involve a range of time frames. For example, Initiative A—effecting a merger with a sister nonprofit—will require 18 months for implementation; Initiative B—an image enhancement campaign—will require 10 months; Initiative C—revamping the annual conference—will take 12 months; and Initiative D—restructuring the board’s standing committees—will take six months. As initiatives are implemented, they move from the portfolio to mainstream operations, and new initiatives take their place as other strategic issues are identified. This approach gives board members a platform for shaping concrete projects that result in real change. ■

*Doug Eadie is president and CEO of Doug Eadie & Company (www.DougEadie.com, Doug@DougEadie.com), specializing in building high-impact board-CEO partnerships. SPECIAL OFFER FOR NONPROFIT WORLD READERS: Receive a 25% discount on Doug Eadie’s books Leading Out-of-the-Box Change, Meeting the Governing Challenge, Building a Rock-Solid Partnership with Your Board, and The Blind Visionary at www.snpo.org.*

### More on Board Effectiveness

To learn more about involving your board in planning and other strategic endeavors, see these webinars led by Doug Eadie (available at [www.snpo.org/lino](http://www.snpo.org/lino)):

- Building a Rock-Solid Partnership with Your Board
- Taking Command of Strategic Change
- Board Committees as Powerful Governing Engines
- Meeting the Governing Challenge

### RESOURCES

Brinckerhoff, Peter, “Three Reasons Not to Plan,” *Nonprofit World*, Vol. 26, No. 1.

Craft, Ralph & Ronald Benson, “Needed: A Better Grasp of Strategic Planning,” *Nonprofit World*, Vol. 24, No. 5.

Eadie, Doug, “Master Change, Or Change Will Master You,” *Nonprofit World*, Vol. 14, No. 4.

These resources are available free at [www.snpo.org/members](http://www.snpo.org/members). Also see Learning Institute programs on-line: Board Governance and Strategic Planning ([www.snpo.org/lino](http://www.snpo.org/lino)).



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(free Yahoo login required)

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If you have any questions, contact Jason Chmura at [jchmura@snpo.org](mailto:jchmura@snpo.org).