

Is Staff Now Responsible for Strategic Planning? Is it time for employees to take over from the board?

Q I've been involved with nonprofits for a long time. Lately, I'm seeing a trend that befuddles me. Boards seem to be too busy to engage in strategic planning, so the staff steps in and does it.

In the cases with which I'm familiar, the staff does have the board review the plan at each step along the way. So at least they're providing input. But it still doesn't sound right to me.

I understand board members can be very busy. But aren't they abdicating a major responsibility if they hand off strategic planning to the staff?

What are your thoughts? Is this good, bad, or not ideal but a sign of the times — something I should just get used to?

A I've seen this as well. And, while we'd probably agree that boards "should" be responsible for strategic planning, I'd say it's definitely a sign of the times.

Let's start by putting this in perspective. Strategic planning gained traction in the nonprofit sector about 20 years ago. Boards set aside time to handle this responsibility newly deemed essential. The greatest emphasis was from the late '90s to around 2005.

At that point people began to recognize the factors that limited its effectiveness. Some of the problems that caused disillusionment with strategic planning and its results:

- **It was expensive and time-consuming to do it "right."** Board members often didn't want to spend the time or the money.
- **Many board members didn't have sufficient knowledge** of the organization and its issues. So, while ideas were bandied about, they weren't moving the organization closer to its vision. More often than not, the ideas were operational rather than strategic.
- **Times were changing so fast it was impossible to look too far into the future.** Sometimes, while the plan was initially on target, it was obsolete by the time it was complete.
- **Often the plan belonged more to the consultant** brought in to facilitate the process than to the organization.
- **Sometimes a funder required the strategic plan**, in which case expediency tended to trump effectiveness.
- **Too many times the plan was put on a shelf.** After all the effort that went into it, no action was taken to put its insights to use.

All too soon the bloom was off the rose. Boards started to do less and less strategic planning.

Staff members, on the other hand, have never stopped defining goals, strategies, and tactics to keep the organization moving forward. Employees are very aware that they're evaluated on their

“Is this good, bad, or just a sign of the times?”

accomplishments and that it's difficult to reach goals if you don't set any.

The fact that staff members share their goals with the board is just plain smart. Doing so highlights the work they're doing and protects their backsides. Given the nature of employees' work, though, the plans they develop tend to be more operational than strategic. In my opinion, that isn't sufficient. Without the continuous infusion of vision and the diversity of ideas a board can bring to the table, organizations can flounder and fail — especially in today's rapidly changing environment.

To satisfy what you and I see as the board's role, while recognizing today's reality, I suggest your board members focus less on "strategic planning" and more on "strategic and generative thinking." They can do such thinking continuously with relatively little additional time, effort, or cost. Toward that end, suggest that your board members follow strategies such as the following:

- 1. Constantly ask "what" and "why" questions.** For example:
 - *What should we be doing* to reach our vision, given this situation?
 - *Why would we want to do this* now?
 - *Why might it be better* to wait till another time?
- 2. Use "BTW Talk."** This requires providing time at each meeting for directors to share what they've heard out in the community in the course of casual conversation ("Oh, by the way...") that could impact the approaches you take moving forward.
- 3. Invite your clients and people who are experts in your mission area** to attend board meetings. They can provide vital perspectives. Do these individuals live too far away? Set up a videoconference — it's easy and inexpensive today.
- 4. Challenge the status quo.** Use a tool like Compass Point's Dual Bottom Line Matrix (compasspoint/dualbottomlinematrix). Such tools can help you answer questions such as:
 - *Are your current programs still appropriate to your mission?* Are the resources gained commensurate with the resources expended?
 - *What opportunities are inherent* in what some might call risky situations?

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Please include your name, organization, address, phone number, and e-mail address. If you'd like your comments to appear anonymously, please let us know. We look forward to hearing from you!

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- **How can you “make lemonade”** from the anticipated crop of “lemons”?

5. **Place multiple options on the table** before making any major decision. Ask questions like these:

- **How does each option fit with previously defined indicators of success?**
- **To what degree will the mission and vision be advanced** by each option?
- **How well does each option align** with your values?
- **What are the ramifications** of each choice – long and short-term?
- **What are the financial implications** of each option?

6. **Choose someone on the board to be your “mission caller” at every board meeting.** That person's task is to make sure that every conversation relates to your mission, vision, or values. If the conversation strays, the mission caller can get things back on track by asking how a comment or idea relates to the mission, vision, or values, and reminding everyone that this is what it's all about.

7. **Create signs that boldly display your mission, vision, and values.** Post them around the boardroom.

8. **Build your board-meeting agendas around your strategic intents rather than “old business” and “new business.”** Spend the bulk of your meeting time in substantive discussion of these strategic intents.

9. **Record your board decisions in action minutes** and/or an accountability matrix. Assign due dates and the name(s) of those responsible for seeing each project through to fruition.

10. **Schedule specific dates** to evaluate the progress being made toward action items you've identified. Note these on the relevant agendas so that the board is always abreast of what's happening. Tweak the direction or strategies as necessary.

If you follow these steps, you'll have a strategic board. Even though board members may not be writing a strategic plan, they'll be doing strategic and generative work. And after all, what's really more important?

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Beyond Strategic Planning

Boost your board's involvement in strategic change with these *Nonprofit World* articles (NonprofitWorld.org/members):

- **Strategic Planning that Works** (Vol. 29, No. 4)
- **Spear Carriers for Change** (Vol. 29, No. 5)
- **Barriers to Strategic Planning & How to Transcend Them** (Vol. 30, No. 5)
- **Make Your Meetings Productive** (Vol. 25, No. 1)
- **Your Strategic Plan Sleeps in a Drawer** (Vol. 29, No. 2)
- **Three Reasons Not to Plan** (Vol. 26, No. 1)
- **What Should You Focus on During Challenging Times?** (Vol. 29, No. 6)
- **How Can Your Board Participate in Strategic Planning** (Vol. 30, No. 2)