

Planning is Vital to Organizational and/or Community Vitality

By Craig Smith

Over the last couple decades, various forms of organizational and community-based planning – i.e., planning that is closely attuned to core values and visionary aspirations – has become more commonplace across North America. And with the pace of change in our world today, it is even more vital to have a plan that is current and builds on your organizational competencies and mission to guide your organization.

I have facilitated more than 100 strategic plans for organizations and communities. The work is distinguished in part by working with organizations or community groups to build their capacity to develop and implement plans. That creates a different relationship. Secondly, our approach is also strategic in that it develops a detailed action plan with benchmarks to track how the organization or group is doing. The action plan includes who is going to do what by when and how much will it cost. Successful groups update their action agenda as circumstances change and new information is obtained and focus on how to keep people engaged in the process over the long haul.

Initially we believed the best sequence was to facilitate a plan first and then develop the capacity to implement the plan. However, we know the converse also works: build the capacity of the group through training, coaching and organizational development and then initiate a planning process focused on the mission, creating a vision and strategic action plan.

We offer a customized approach to meet your needs. Whether it is a longer term process or completed in one evening or day, the process builds on assets and achieves consensus on priorities. It is important to have a broad based group that represents key stakeholders to participate in the planning process. The process often starts with appreciative inquiry to honor and build on past success and include a Strengths, Weaknesses, Opportunities' and Threats analysis. Next we develop or refine the mission, and create a vision with goals, strategies and a detailed action plan that includes success measures, budget, timeframe, collaborators and the person who will lead that effort.

It takes human as well as financial resources to accomplish things. One of the challenges with planning is that after a year or two, volunteers can drift away and there are a small number left doing the work. If the group starts to shrink, we use the asset based process to help leaders broaden the circle and bring in new people and complete a stakeholder analysis to engage new people. And it is vital to celebrate successes to demonstrate the outcomes achieved, recognize those that made it happen and inspire others to keep moving forward on the next priority. And when you have completed your plan or circumstances have changed, it is time to update or create a new plan.