

False Starts - 13 Ways to Blow Strategic Planning **By Bob Harris, CAE**

Boards can be resistant to think strategically. Some finding it easier to focus on the short term thinking and safe topics.

A few boards consider planning an expensive process. Others fear the group hugs and games that characterize some retreats. Even the boards that have budgeted for planning often delay it a year or more.

Reports say that up to 50 percent of strategic plans fail. Here are 13 (unlucky) false starts and failures in the process.

1. **Annual Planning** – A strategic plan should span 3 to 5 years. If planning occurs every year it becomes a short term plan associated with the current chief elected officer. When directors know the organization plans annually, they seldom think beyond the year, “We don’t need to think long-term because we will be doing this again in 12 months.” The plan should be considered “rolling” for a period of at least three years to guide the board, and reviewed for progress annually.
2. **Too Many Planners** – The IRS suggests that the size of an exempt board of directors should facilitate meaningful conversations. Too few people may limit ideas. Too large may draw out meetings with so many people providing input. The dynamics are far different for a group of 15 persons versus 30 or 40. The right size planning team is usually 15 to 20 strategic thinkers. If the desire is more input, conduct advance focus groups or surveys. Every 4 extra people at a planning meeting tends to add an hour to the schedule so that everyone can be involved and heard.
3. **Meeting Environment** – From temperature to natural light, the room environment is critical. Squeezing too many people into a dimly lit room will have a negative impact on outcomes. Avoid basements, dark narrow rooms; be sure the room temperature can be controlled and there is space to spread out (people and breaks.)
4. **Table Arrangement** – An open-U arrangement allows everyone to sit at the same table, easily hearing and watching what is said. (Observing body language is key in strategy development as directors might have good ideas but their micro-cues indicate otherwise.) Place a flip chart or screen at the open end of

the table. Consider a room with enough space to accommodate several rounds in the back of the room for breaks, meals or small group work.

5. **Terminology** – Many of the participants may never have been involved in strategic planning, while others come from an environment that conducts planning but uses terms unique to their settings. Understanding and agreeing to the words associated with nonprofit planning is critical. Otherwise, directors provide input but don't know whether they are offering a goal, strategy or tactic. Keep a terminology card on the table that defines: Mission, Vision, Values, Goals, Strategies, Performance Measures and Tactics.
6. **Wrong Season** – It would be unwise to conduct strategic planning in the middle of the current term of office when the chief elected officer's year is underway. An ideal time for planning is as the current term comes to a close. This allows incoming officers to create a plan and then have a month or more to consider implementation (assigning committees, adjusting budget, etc.) Or conduct planning immediately at the start of the new term. There should be linkage between planning and budgeting.
7. **The Right People** – The wrong people can doom the process. It is a responsibility of the board of directors. If the board is large or all directors are not strategists, pare down the number. Avoid an imbalance of past presidents or chairs – the meeting is about the future. Find ways to include visionaries, emerging leaders, representatives of diversity those who embrace technology.
8. **Plan Report** – The final plan should not be measured by the number of words or pages. Some of the best plans can be summarized on a business card. Be sure the report is drafted within a few days of the retreat and shared with participants so they can see results of their volunteer time. Avoid adding "fluff" to the report that includes pages of reports, the environmental scan (SWOT), agendas or survey results. Let the plan stand on its own as a report about how the organization plans to advance its mission and goals. (Remember that busy people seldom have time to read more than 3 pages before they are interrupted; shorter is better.)
9. **The Facilitator** – The facilitator is charged with keeping discussions on track and completing the task at hand – development of a multi-year, visionary, compelling strategic plan. Be leery of the board that asks their executive director to facilitate. The executive should be a participant at the table, not the note taker. Be cautious about the elected leader who wants to facilitate or has someone from his or her company lead the meeting; it is likely to be a conflict of interest and may diminish honest dialog. Identify a facilitator who fits your culture and understands your desired outcomes.

10. **Level of Discussion** – One might characterize board discussions at the 50,000 foot level --- visionary, strategic conversations that reach into the future. That would position committees at about 25,000 to 35,000 foot and staff at about 10,000 foot (defined by the IRS as “implementing the decisions of the board.”) At strategic planning, conversations should be 50,000 foot and higher. It is not the place to question the price of coffee breaks or whether the office needs painting.
11. **Number of Goals** – Most organizations can hone down their priorities and projects to just 3 to 7 goals. A wise director at the planning table once reminded, “None of us will remember more than four goals so we should stop now.” Nearly every organization can advance their purpose with 3 to 5 well considered goals. Each goal will be supported by several fresh and on-going strategies to which resources must be aligned.
12. **Realty Check** – Planning should be based on reality and capacity. Brain storming with limited resources (funds, volunteers, committees, technology and staff) is unproductive. Strategic planning can be described as the “disciplined allocation of resources.” Be sure the facilitator and planning group are familiar with resources before setting goals
13. **Deployment** – Most planning retreats occur over weekends; Monday morning may be the death of the plan. There are a series of steps that must occur soon after planning for implementation; including: alignment of committees, stakeholder awareness, program of work, and periodic progress reports.

Understanding the false starts and traps will improve likelihood of success.

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Note: Bob Harris, CAE, provide free governance tips and templates at www.nonprofitcenter.com.