

The Strategic Imperative

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The Problem

An experience I have faced several times as a consultant when working with not-for-profit organisations is being asked undertake a piece of work in a particular area (such as fundraising or communications), only to find that it is almost impossible to make effective recommendations on that area, as the organisation is not operating according to any real strategic plan.

There may either be no strategic plan at all, or the governing board may have listed a broad collection of actions that they want to complete over the next couple of years, which the staff and volunteers have then been attempting to undertake. Often, this collection of actions has not been based on any clear idea of what the organisation exists to achieve or what direction it wishes to head towards in the future.

This poor (or non-existent) strategic planning can result in operational teams (including staff and volunteers) finding it difficult to plan their workloads, and often doing work (whether individual tasks or whole projects) that is 'nice to do' rather than something that is actually going to have the impact on the world that the organisation wants to achieve.

This lack of planning can not only result in a lack of direction for the organisation and the individuals within it, but can also manifest itself in a number of other symptoms. A fairly common example of such a symptom is when the board or staff of an organisation are asked to describe exactly what it does or what purpose it exists to serve, and having pondered the question for a while, they admit they do not know. This may be an astonishing and somewhat alarming realisation to reach if you are a member of staff who has worked in a committed way for an organisation for some time, but if the organisation's mission, values and aims are not clearly noted (as they would be at the first few pages of a strategic plan, for they form the starting point of such a document) then it should not be surprising that its purpose is unclear. An organisation can exist in a reasonably harmonious way for some time without a clear purpose, although under these circumstances it is likely to just be 'plodding along' and achieving a great deal less than it could rather than actually moving forward with any real momentum. Once such an organisation attempts to build greater momentum in its work, the need for a plan to guide it is likely to become abundantly clear.

A further consequence of this particular symptom is that organisations can find it difficult to articulate their (often wonderful and useful) work to the public and other external contacts in a concise and motivating way, leading them to miss out on many

opportunities to build awareness of it, increase its user base or build support for it, including financial support.

But, aside from not having a clear idea of what the organisation exists for, perhaps the main problem of not having a strategic plan is that an organisation will have no idea of where it wants to get to (its goals) or the most effective way of getting there (its strategy and actions). This results in a wide range of symptoms, including those discussed earlier such as taking inappropriate actions and difficulty in planning workloads.

The Solution

The solution to this problem is clear – organisations, however small, need to give some time and attention to planning. This does not mean hastily putting together a plan that is only distributed to trustees, read by them once and left to gather dust on a shelf. Instead, it means instilling a ‘planning culture’ – turning the organisation into a body that is driven by its strategic plan, with trustees and staff focussed exclusively on achieving the goals set out in the plan.

In an organisation with such a planning culture, its strategic aims run like a spine through every activity it undertakes and every decision it makes, however large or small. Everything – from staff recruitment to individual workloads - is evaluated according to its effectiveness at meeting the organisation’s goals. Unfocussed tasks are therefore removed from workplans.

A range of positive consequences result from this process. For example, staff and volunteers are more motivated as they have a clear idea of the goals they are working towards. They also feel more fulfilled as they can see they are each making a real contribution towards achieving these goals. Overall, the organisation (and everyone in it) becomes aware of its purpose and able to choose the most effective ways of achieving its goals – in other words, it gives itself the best possible chance of success.

An argument commonly made against a strong planning framework is that it results in an organisation and the people within it being restricted in the work they can do, and tied to very specific work plans. The reality is quite the contrary – planning helps you identify where you are and where you want to be, and helps you to evaluate the options for getting there. These options are not set in stone – they are flexible and may well change over time, and a good planning process should have regular review stages to ensure an organisation, team or individual is continuing to choose the most appropriate options to meet their goals. Planning therefore brings flexibility. It also makes it easier for an organisation to evaluate, then react quickly to, opportunities as they arise.

Organisations do not necessarily need to hire consultants (like ChangeStar) to undertake their strategic planning process, although some prefer to have an expert to do this and others feel it useful to have an outsider’s view at certain stages of the process, for example, when the organisation is evaluating its current position.

For those who choose not to use external consultants, free resources are available to help organisations conduct their own strategic planning processes – one useful example is produced by Civicus, and can be found at <http://www.civicus.org/new/content/civitoolkits2.htm>.

Whether you decide to hire a consultant or do it yourself, giving time to developing a strategic plan and establishing a planning culture can rejuvenate your organisation. We hope it brings great success to yours!

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