On September 16, the OSCPA Not-for-Profit Strategic Planning Committee presented an interactive panel discussion at Sisters of St. Mary entitled Strategic Planning: Approaches, Benefits, and Challenges. Panelists included: Sam Adams, Executive Director, City Club of Oregon; Derek Smith, CEO, Clean Energy Works; Sandra Suran, President, The Suran Group; and Anna Young, Senior Director for Strategy and Learning, Mercy Corps. Kay Sohl, Kay Sohl Consulting, moderated the discussion which focused on helping not-for-profits implement a strong and successful strategic plan.

Keys to Successful Strategic Plans

Create a motivating vision. In order for a strategic plan to be successful, board members must be motivated themselves in order to inspire others. Anna Young said, “Having board members model the practices you want to infuse throughout the organization is really important. For example, our board members travel to our field programs to see the work that we’re doing. What this says is that somebody cares enough about the program to get on a plane, come and visit, and give feedback. The fact that the board appreciates what we’re doing is motivating.”

Encourage board engagement. The role the board plays in the strategic planning process is important to the outcome of a well-executed strategic plan. It’s not only important to clarify expectations up front, but also to help motivate board members. Sam Adams recommends encouraging the board to ask a lot of questions and seek input from outside of the organization. “Ask the board and have them ask other people. So they aren’t just hearing it from you, but allowing them to see for themselves,” said Adams.

Make sure everyone is on the same page. Another significant element to a plan’s success is to allow time for big-picture strategic planning. Going through this process will help foster a sense of collaboration among board members. Sandra Suran said, “Go through steps that will give you the big picture focus first and before the SWOT analysis. It’s a good way to get everyone on the same page and to get them thinking about strategy.”

Ask people for help. Don’t be afraid to ask people for their support or assistance. Adams said, “If you don’t ask, you won’t be told no. I find that for the not-for-profits I’ve worked on and the not-for-profit I’m on now, they just didn’t ask enough people for help. You’ll be surprised how often the answer is yes. There is a certain ratio involved. You’ve got to ask people for help, assistance, whatever. I’m surprised how often not-for-profits don’t ask.”

Have tough conversations. Another significant aspect of strategic planning is building consensus. Avoiding difficult or uncomfortable conversations can hinder a plan’s outcome. Derek Smith advises people to address challenges and eliminate tension. Smith said, “If a board member is feeling one way and another is feeling a different way, and the tension is not addressed, it’s a disservice to the organization.”

Facilitate control within the organization. Building upon Smith’s comments, Young reiterated the importance of facilitating control. “Look around at different models, and look at where your organization is before doing it. How do you build ownership within the organization? Understand that massive participation can lead you to the most common denominator.”

Next in the Series

The OSCPA Not-for-Profit Strategic Committee will continue the series on January 27 at the National College of Medicine in Portland with Diversifying Your Revenue Stream – Where’s Your Paddle?