

# *Building Bridges*



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## *LONG-RANGE VISIONING & STRATEGIC Planning*

### INTRODUCTION

Welcome to the first issue of *Building Bridges*, a bi-monthly newsletter on management issues of interest to staff and board leadership of nonprofit organizations.

*Building Bridges* is a complementary publication of *TRANSITIONS IN LEADERSHIP*, a company providing a variety of management services to nonprofit organizations.

Each issue of *Building Bridges* will address a different topic of importance to nonprofit organizations and its leaders. Topics scheduled are: strategic planning, board/CEO relationships, performance evaluations, and others. We are hoping that you, the reader, will identify other subjects of interest. Please send your comments, questions, and suggested topics to us at:

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We also would like to know your impression of this first edition.

Would you like to receive your copy of *Building Bridges* via e-mail? If so, please e-mail us your name, name of your agency, and your e-mail address.

### Why plan for the future?

Guiding your organization requires knowing where you want it to be in the future. The successful completion of the journey requires having a roadmap telling how to reach your destination. A good roadmap should warn you of roadblocks, curves and potholes. It should also provide directions for avoiding these threats. A good roadmap will also recommend detours to be taken in order to reach your destination.

Continuing to lead your organization without a current roadmap (Long-Range Vision And Strategic Plan) is fool-hearty within today's environment. Nonprofit organizations face threats such as: changing funder priorities, demand for cost containment, increased demand for accountability, changing consumer dynamics, staff recruitment and retention, increasing competition from other organizations, and pressures to create strategic alliances and even consider mergers.

Robert Frost wrote about coming upon a fork in the road and taking the one less traveled. Yogi Berra would have advised Frost "When you come to a fork in the road, take it." Your organization faces many forks in the road. Will you follow Yogi's suggestion or go with Frost or, even better, take the road that best fits the organization's ability to survive and thrive in the future? Planning prepares you for that fork in the road. It builds that bridge to the future.



*"Without Strategy,  
Personalities Will  
Prevail."  
Deming*

## **TRANSITIONS IN LEADERSHIP**

*Providing Management Services During Times  
of Organizational Change*

### TIL's Management Services

Facilitating the Long-Term Visioning & Strategic  
Planning Process

Training Seminars/Retreats for Board & Staff

Enhancing Team Building & Leadership

Assisting With Strategic Alliances & Mergers

Reviewing & Analyzing Management Systems

Placing Interim Executive Directors

Conducting Executive Searches

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### Building a Bridge To The Future

As a leader of your organization, you are all too familiar with today's challenges, which can either be a threat or an opportunity. Preparing the board and staff to be pro-active in meeting the challenges and taking advantage of present and future opportunities is often referred to "Long-Term Visioning and Strategic Planning."

Transitions In Leadership uses a four-phase process for building a bridge to the future. Phase one is Information Gathering. This phase provides the foundation for Fact-Based Decision Making. "Taking the temperature" of the organization helps in diagnosing its present health.

Phase two is Strategic Thinking & Planning. During this phase, the planning committee identifies the organization's long-range vision, core values and mission. Members conduct an analysis of its Strengths, Problems, Opportunities, and Threats (SPOT). Critical Issues that now are present or may impact the organization are identified and prioritized, leading to the development of Strategic Goals and Objectives.

Phase three is Operational Thinking & Planning. The organization's staff develops Action Steps for each Strategic Objective. These Action Steps provide a detailed description of how and when each Objective will be accomplished.

Phase four is Evaluation. A system of status reports on the progress of the Goals, Objectives, and Action Steps is built into the process. The monitoring of specific performance milestones is an essential part of the process. It provides the structure so that the well thought out plan does not gather dust on the shelf. An evaluation system ensures an active living document, enabling a rapid pro-active response to the ever-changing environment.

Please help us keep our mailing list current. Please fax us any corrections to the mailing label used for this newsletter. Make corrections and fax them to us. Thanks.

**Topic for Next Issue**  
*Information Gathering: The Foundation  
for Fact-Based Decision Making in the  
Planning Process*

**Ten Questions That Help determine if you need a new strategic plan**

The following questions will help you determine whether your organization needs to start the planning process.

1. Our present strategic plan is more than five years old.  
*True False*  
**(If you answered "True" to this question, you don't have to go any further. Your present plan is no longer relevant to today's environment. It is time to start the long-range visioning and strategic planning process.)**
2. Our CEO and staff developed the present strategic plan, with little or no involvement from the board, or visa versa.  
*True False*
3. We often find ourselves unprepared for the changes in funders' priorities and customer demands.  
*True False*
4. We are constantly worried about balancing our budget while also maintaining quality services.  
*True False*
5. There is increasing competition for public and private funds.  
*True False*
6. The services we have always provided are now available through many other agencies, increasing the competition for clients and funds.  
*True False*
7. The people who come to our agency have different needs than those people we served a few years ago.  
*True False*
8. The increasing demand for accountability is putting more stress on our budget.  
*True False*
9. Recruiting, training and retaining qualified staff is at crisis proportions.  
*True False*
10. Our long-range vision, statement of core values, and mission are no longer relevant to what we presently do.  
*True False*

**If you answered True to five or more of the above, you need to start the planning process right away.**

**Preparing for the journey**

When should an organization embark on the planning journey? First of all, the planning journey should never really end. But if you do not have a current plan, it should start right away.

First, both board and staff must commit to conducting a planning process. This commitment will include: Time, Budget, Hiring a Facilitator, Working as a Team, and Follow-Through.

**Time:** A Strategic Planning Committee should be appointed, consisting of key board leaders (e.g., Present, Past and Future Board Presidents, Treasurer, and others) and top management staff (e.g., CEO, CFO, Department Heads). These individuals must be willing and able to give their valuable time to the process.

**Budget:** The organization needs to allocate funds to pay for costs related to the planning process. Cost items may include: hiring a facilitator, meetings/retreats, printing, and postage.

**Hire a Facilitator:** The importance of having someone independent from the board and staff to lead the process is critical, if the final plan is to reflect a group consensus of where the organization should be heading. The facilitator provides an objectivity that cannot be available from staff or board members. By having a facilitator leading the meetings, all members of the Strategic Planning Committee can be active participants in the discussions and decision-making process.

It is also important to have an independent facilitator for information gathering, in order to obtain stakeholders' true opinions and perceptions of the organization, its services, and management.

**Working as a Team:** The members of the Strategic Planning Committee must be a group of individuals who trust each other and respect the right of others to have differing opinions. They need to be committed to listening to each other and reaching decisions by consensus. The Strategic Planning Committee should consist of key leaders from both the board and top management staff.

**Follow-Through:** The organization must be committed to including status reports of the plan's progress in the agendas of management team meetings, and committee and board meetings. Each Goal should be reviewed annually. They should be revised as needed to meet the organization's situation at that time.

## A Long-Range Visioning & Strategic Planning Model

