

# Is it a strategic plan refresh, or an overhaul?

By Carol A. Poore, Ph.D., MBA

As a board member, this was the *worst* strategic planning session I had ever attended.

At a fancy hotel conference room, a well-meaning facilitator started off a half-day strategic planning meeting with a nonprofit board of directors. Within the first five minutes after introductions, the facilitator attempted to lead a discussion about changing the nonprofit's vision. An extremely upset fellow board member threw a fork across the room, nearly stabbing another board member in the face.

"You've got to be kidding," I thought, searching for the nearest exit.

Moments later, that board member apologized, the group took a break and the rest of the day was awkward!

What went wrong?

**First, the facilitator failed to research whether the organization should overhaul its vision and mission – a very serious and deliberate discussion. Also, the organization's executive delegated all responsibility to the facilitator, neglecting to direct the process.** Clearly, this 40-year-old organization did *not* need to have its board engage in a vision-mission discussion. This vision and mission were clear, compelling, and still relevant. Instead, the board and executive team had hoped to develop strategic goals for the next three years.

**Second, the facilitator was well-meaning, but weak.** As the discussion heated up, the facilitator should have taken immediate steps to pull the group together, seek clarity for the half-day retreat, and help the board move beyond the conflict.

Many organizations embarking on a strategic planning process *do not* need the vision overhauled. (The vision is an aspirational statement helping the leadership team to look beyond the horizon and define where the organization aspires to be.)

Rarely does an organization need to redefine its mission. (The mission defines what the organization *is* and *does*– its reason for being.)

Here are tips to help you know whether your strategic plan needs a refresh (an assessment of the competitive marketplace and SWOT, followed by shaping multiyear goals) or an overhaul (all of the above, plus revision of vision and mission). As you "plan to plan," ask these important questions.



## Ingredients of a Strategic Plan

A full-blown strategic planning process examines an organization's vision, its mission, competitive intelligence, SWOT (Strengths, Weaknesses, Opportunities, and Threats), multiyear goals, and a plan for measuring progress (metrics). Then, a 12-month annual operating plan and dashboard or measurement grid can be developed to track progress.

- ✓ Have competition and industry trends recently reshaped your industry and/or your business?
- ✓ Has your organization recently found more success in providing new types of products or services?
- ✓ Is your organization floundering in any way?
- ✓ What strategic planning outcomes are envisioned by the organization's board and executive team?

**More recommendations:**

1. Establish ground rules for the planning session. It's important for participants to understand the meeting's purpose, their role, and rules for engagement.
2. Hire a strategic planning facilitator who meshes well with your organization's leadership team, board and culture.
3. Hire someone who will bring out the best in the group, as well as maintain control of the agenda and potential conflicts. An effective strategic planning facilitator completes an extraordinary amount of homework, will help you structure the entire process, and during sessions will allow people to share ideas as well as disagree in a civil manner, adhering to the respectful ground rules.

**Poore & Associates looks forward to sharing these exciting topics:**

- ✓ How to create a profound, action-oriented strategic plan.
- ✓ How to shape an engaging, life-changing planning process.
- ✓ How to create a compelling story – and bring it to life.
- ✓ How to hire outside expertise, while driving the planning process from the inside.
- ✓ How tracking your strategic plan actually can be fun!
- ✓ Taking a social approach to strategic planning.
- ✓ Strategic fundraising: Outside of the box development to engage your company and your constituents.
- ✓ Your investment "whys:" How to develop a compelling case for support.
- ✓ Building your organization's diversified fundraising pipeline.

Stay tuned!

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