

## How to Fit the Planning Process to Your Organization

By Jay W. Vogt



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Ever wonder how to create a strategic plan that is just right for your organization? You'll find no shortage of books and consultants promoting the perfect planning process. But a generic process may not provide the best fit with your nonprofit. The fit between planning process and organization should be negotiated during the design of the "plan to plan."

A **plan to plan** is set of a working agreements among key players in your planning process, typically engaging leadership but sometimes involving key external stakeholders. It details:

- The key outcomes of a successful planning process, including a Table of Contents for the completed strategic plan.
- The key tasks that are individually necessary, and collectively sufficient, to achieve the outcomes.
- A timetable of those tasks, perhaps working backward from the desired end date of the planning process.
- Assignment of those tasks to internal leaders, internal work groups, and external consultants.
- Budget for costs associated with the tasks.

Because no institution, at any given point in time, is exactly like any other institution, no plan to plan should be exactly like any other. Every nonprofit initiates planning at a unique moment in its history. A planning process that gives you a perfect fit adapts to these realities, and in fact celebrates them.

An effective plan to plan can closely meet the needs of an organization if it addresses key questions in at least six areas: 1) outcomes; 2) timing; 3) involvement; 4) process; 5) synergies; and 6) resources.

### Outcomes

What outcomes are required to meet internal requirements? External requirements?  
What does the final Table of Contents look like?  
What process outcomes do we want to achieve as well?

### Timing

When does the process start? End?  
How much time is available during the planning period for planning?  
Are there any special periods of down time when nothing is likely to happen?

### Involvement

What internal and external stakeholders need to be involved in the process?  
How would we build commitment among them to the results?  
How would we encourage and allow for the emergence of leadership in the process?

### Process

What kind of planning fits best with the culture of this institution?  
What kind of planning fits best with the institution's industry and its best practices?  
How and when will decision making take place, and who will be involved?

### Synergies

What planning work has already been done that we can build upon?  
What parallel planning processes, if any, might we want to integrate?  
What events or processes are already set with which we'll want to piggyback?

### Resources

How much time is available?

How much money is available?  
What internal and external resources can we use?

The organizations that reflect on these questions and their answers will discover insights about their unique needs, limitations, resources, and requirements for strategic planning. It is most valuable to bring board and staff leadership together to discuss these factors. A large calendar mounted on the wall creates a shared visual focus for the group to define planning start and end dates, final outcomes, and tasks that contribute to each of those outcomes.

By integrating those insights into a negotiated plan to plan, and an eventual plan Table of Contents, they create a planning process that may not be perfect, but is a perfect fit for their organization.

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