Strategic Planning That Makes A Difference

And That's Worth the Time

* A fresh approach for social justice groups

Management Assistance Group
Make real change

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The Management Assistance Group

The Management Assistance Group strengthens visionary organizations that work to create a just world so they can persevere as powerful agents of social change. For over 27 years, we have worked in partnership with hundreds of organizations to build clarity of purpose, effectiveness in achieving goals, and powerful strategies.

Our work has taken us to virtually every state, and across the spectrum of social justice issues. We assist organizations in many areas of organizational development, including strategic planning, fund-raising, adjusting to growth and change, managing people, restructuring, and board development.

Our consultants come from the world of social change, and we are proud to play a part in building a strong social justice community and, in turn, a better future.

This publication compiles over 27 years of practical tips, tools, and insight from our work with social justice organizations. We hope you find it useful. To find out more about us, our publications, and our services, visit us on the web at www.managementassistance.org.

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Introduction

Let’s face it: The last thing you need is another step-by-step guide on how to conduct a strategic planning process. Google alone shows 33,800,000 entries for “strategic planning guide.” So instead of addressing process, this publication focuses on **substance:** what social justice organizations need to know about strategic planning in order to make it more accessible, viable, productive—and far more valuable.

Planning that makes a difference—that shapes an organization’s course and enhances the impact and effectiveness of its work—need not follow a set, rigid process. But it does require you to step back from current activities, focus on the big picture, and think about your program in a manner that’s disciplined, rigorous, self-critical, and fresh. It requires asking “What end results do we want to produce for society, and what do we need to do over the next few years in order to make the greatest difference toward achieving those goals?” These are challenging questions, but MAG has never seen an organization that was unable to tackle them. Those that do so emerge stronger for having gone through the process.

The sections below address what you need to know to do planning that makes a difference:

① **Does Your Organization Resist Planning?** Does planning feel a lot like exercising—you know you should do it but somehow never get around to it? What is it about planning that organizations resist—and what will help them get beyond these barriers?

② **Is Planning What Your Organization Really Needs?** Many of the problems organizations face arise because the organization isn’t clear about where it’s going and what it’s all about. What are the signs that your organization may need to plan?

③ **Is Your Mission Crystal Clear?** Ensuring that your organization has a shared, clear understanding of its mission is the first step in valuable strategic planning. Here's how you crystallize your organization's mission, role, and special niche.

Why Mission Creeps and Fades What forces do you need to be aware of to keep your organization on track?

④ **The Two Biggest Planning Mistakes and How to Avoid Them** The two biggest planning mistakes social justice organizations make are thinking in terms that are too short-range and failing to define the long-term effects they seek to make with their work. How do you avoid these related mistakes? By focusing on outcomes: defining the central goals that must be achieved for an organization's vision for society to be realized.

What's the Different Between Values and Goals? Social justice organizations are nearly always driven by a highly cherished set of core values. But sometimes, organizations confuse their ideological values with their goals. Here's how to avoid this common problem.

⑤ **Don't Forget Priorities! How to Set Them and Stick to Them.** A plan without priorities is like a ship without a rudder. Here's how to tackle the tough exercise of setting priorities.

⑥ **Extra Tips to Make Your Planning More Valuable and Productive**

Do You Want to Read More?

Does Your Organization **Resist Planning?**

Interest in strategic planning is growing among social justice organizations. Prodding from donors has stimulated some of the interest, but social justice organizations themselves are also realizing that they've got to have a solid, compelling case for support in today's competitive funding environment.

Still, organizations resist and put off planning for a variety of reasons. Some are reluctant to start the process because of vague fears and gnawing doubts about where it might lead, what it will entail, and how productive it will—or will not—turn out to be. Surfacing these concerns, understanding why they shouldn't stop you, and demystifying strategic planning are often the keys to helping organizations overcome their hesitation and unlocking the benefits planning can bring.

Does this sound like your organization?

"We don't have the time."

The most common barrier to planning is the belief that you don't have the time to do it. Yet organizations with pressing social agendas never have any spare time. They have to make time for self-examination, reflection, and charting a future course. That means carving out time from your organization's usual work and making planning a top priority.

"We don't know how to do it right."

Many books and articles on planning have done organizations a disservice by making strategic planning seem far more complex, technical, and imposing than it really is. Some groups become so tangled, frustrated, and confused over the proper application of planning terminology—wrestling with the difference between a business plan and a strategic plan, for instance, or debating whether something is a purpose, goal, strategy, or objective—that they spend more time processing than planning. Planning is really no more than getting clear about what your organization wants to accomplish and then devising a realistic strategy for getting there. In fact, organizations are engaged in planning all the time, although it's usually done informally, in short time frames, and on a project-by-project or proposal-by-proposal basis. What organizations tend to avoid or neglect is comprehensive, long-term planning: defining their overarching long-range goals, direction, and strategy, and using those elements as the framework for designing annual plans and priorities.

"Our last plan made no difference at all."

Most executive directors of social justice organizations have had at least one bad experience with planning. Sometimes the process was so detailed and time-consuming that the costs outweighed the benefits. Other times the process resulted in a plan that just sat on a shelf, providing little real-life guidance, either because it was too broad and vague, or because it was nothing more than a long, undifferentiated laundry list of everything the organization would like to do. But it's a mistake to conclude from these experiences that planning isn't worth the effort. In fact, we have seen countless planning processes that were clarifying and illuminating, and which resulted in a real difference in effectiveness and impact.

> Some groups become so tangled, frustrated, and confused over the proper application of planning terminology—that they spend more time processing than planning.

"We don't want to lose our flexibility."

Many social justice organizations are reluctant to plan because they see it as a straitjacket, closing down their options and destroying their flexibility. They fear that agreeing to a plan means giving up the ability to respond to new opportunities and changing circumstances. They point to the unpredictability of the political and social environment and say, "How can we plan when we don't know what will be happening five months from now?" But a plan is a tool, not a taskmaster. It doesn't prohibit you from taking on something that's outside the plan, but it does give you some standards for determining whether or not a new project is worthwhile. Equally important, it forces the organization to look at what it may have to give up, or what activities it might be forced to curtail, in order to have the time and resources for an added activity.

“Funding realities determine what we do.”

Why bother to plan, some organizations say, when we know what really matters is what funders are willing to support. Nothing can lead more quickly to a loss of direction and identity—and a waning conviction about the value of the work—than programs that have been shaped by the interests of funders rather than by the organization’s priorities. Organizations that first identify their course of action and then advocate for it through their fund-raising program are often surprised at the response they receive. As one group concluded: “We discovered that it’s vision that creates commitment, commitment that creates energy, and energy that creates funding—not the other way around.”

> Many social justice organizations are reluctant to plan because they see it as a straitjacket.

“We have to do it all.”

Many organizations resist planning—or do planning that makes no difference—because they don’t want to make hard choices. They know they’re spread thin, but they are unwilling to bite the bullet and decide what they need to drop or scale back. Either they don’t want to face the discomfort of cutting anything, or they have divergent views about what’s most important, or they’re unwilling to foreclose any option that may represent a potential funding stream. As a consequence, they end up trying to do some of everything, not realizing that organizations that confront thorny issues and work through conflict are far stronger than those that tiptoe around differences, trying to satisfy everyone but fully pleasing no one. The irony is that, at the end of the day, limited time and resources force every group to make choices. But the choices made by groups that try to do it all tend to be reactive, haphazard, and disjointed rather than deliberate, strategic, and coherent.

Is Planning What Your Organization **Really Needs?**

Many common organizational complaints and problems, while seeming to be about something else, are really rooted in an organization's lack of clarity about who it is, what it's all about, where it's going, and what's most important for it to do. Here are the red flags signaling that planning may be exactly what your organization needs.

Do you see the signs?

FEELING OVERWHELMED

"We need better systems" or "We need to take a time management course" often become the refrain when staff members feel overwhelmed by all they need to do. But often what an organization really needs is not better systems but more clarity about its direction and priorities. With that clarity it will be able to choose what is really important for it to do—and what it should decline or withdraw from doing.

FEELING FRAGMENTED

People feel locked into separate projects, disconnected from one another, and clueless about how their work fits together. They think the answer is more communication, but they really need to define what the organization's overarching purpose and goals are, how its activities interrelate, and what it all adds up to.

A SENSE OF STALENESS

People no longer feel inspired or excited about their work. Their jobs drain them instead of energizing them. They wonder if the organization is still making a difference, or whether it needs to redirect or reinvent itself in light of changing realities. A process that returns the organization to its core mission and elicits creative thinking about the future will energize and reinvigorate staff members.

CHRONIC FINANCIAL PROBLEMS

These groups often know exactly how much money they have, or, more likely, don't have. The problem is that they start new projects anyway, even when they lack the funds to do so. What is missing is not a good accounting system or financial controls, but the limits and discipline developed through a tough priority-setting process.

CAN'T EVER SAY NO

Some organizations can't say no—not to their constituencies, staff, board, funders, or colleagues. They try to please everyone. The result is that they do a little bit of everything, but nothing thoroughly or well. The irony is that they often end up disappointing everyone, since nothing receives the focus or resources it needs.

CHASING GRANTS

When organizations start going after whatever funding is available they often wind up with a mélange of separate projects—not because they advance the organization's mission, but because some funding source wanted them. Nothing is more dispiriting to staff members than the feeling that their organization is chasing money rather than staying true to its central cause.

OUR ONLY PROBLEM IS FUNDERS

Many organizations think that their only problem is funders who fail to understand and appreciate them. These groups think they just need better fundraising techniques or a snappier way of communicating. But in many instances the groups are not clear about their own goals and direction, so they can't make a compelling or persuasive case to others.

AN UNINVOLVED BOARD OF DIRECTORS

Board members sometimes disengage when an organization's focus or direction is unclear to them, or when they feel as though they have no role in the organization. A strategic planning process that redefines the organization and involves the board can often reinvigorate board members, strengthen their roles, and reinvest them in the organization.

LOTS OF INTERNAL CONFLICT

People often blame conflict in an organization on clashing personalities when, in fact, it's caused by real differences over the organization's direction and priorities. Even when the cause is personalities, simply getting back in touch with everyone's shared vision, purpose, and goals can be extraordinarily uniting and healing.

Is Your Mission **Crystal Clear?**

To be powerful and effective, social justice organizations must have a well-defined mission that everyone in the organization understands, that clearly communicates what the group aims to accomplish for society, and that defines the fundamental way it intends to achieve that change. That's why the first step in strategic planning should focus on revisiting, clarifying, and honing one's mission.

Contrary to common belief, having a mission statement does not necessarily mean an organization's mission is clear and well-defined. Many mission statements are so broad and vague that they fail to distinguish the group's ultimate aim or to articulate its special role. They are crafted to make everyone happy, and their all-inclusiveness masks the fact that the staff and/or board really have divergent views about what the group's mission is. In some organizations, activities become so diffuse that there is little relationship between what their mission statements say and what they actually do. And in many organizations, the mission statement has become hollow words that everyone repeats—but without real heart, meaning, or conviction.

Contrary to common belief, having a mission statement does not necessarily mean an organization's mission is clear and well-defined.

A mission that lives as the driving force behind all of an organization's work is neither a slick slogan nor a neat description of the group's activities. Rather, mission—in its authentic form—constitutes the enduring vision, thrust, and character of an organization. It captures the organization's soul, reflects the idealistic motivation behind its work, guides its activities, and provides the glue that holds the organization together. Mission also reflects what is special or unique about the organization—what distinguishes it from others in its field. Clear mission is always inspiring: If it does not motivate and unify an organization's staff and board, something is off or missing.

How Do You Crystallize Mission?

The best way to clarify mission is to break it down into two interrelated but distinct parts: core purpose and core strategic approach. Distinguishing each of these parts separately enables an organization to crystallize its mission, and define it in the sharpest and most and cogent terms.

Core purpose. This is the organization's most fundamental reason for existence. It is the ultimate aim of the organization—the vision it is perpetually seeking to realize. Core purpose describes not what the organization does but rather what it is working to achieve for society—for example, the end of homelessness, or the fair and just treatment of those accused of crimes. All of an organization's programmatic activities are united under the banner of its core purpose.

Core strategic approach. Simply put, this is the central methodology the organization relies on to achieve its core purpose and goals. It is the main way the organization goes about causing the societal change it is seeking. Social justice organizations use a wide range of tools to achieve their goals—research, policy analysis, legislative or administrative lobbying, litigation, public education, media work, coalition-building, technical assistance, grassroots/grasstops organizing—but they usually rely on one core strategy. For example, some organizations deploy a combination of research, policy analysis, and policy expertise to influence public policy. Others focus on strategic communications to shape the debate and opinion climate in which policy-making occurs. Still others rely mostly on informing and lobbying policymakers, or on educating citizens and mobilizing grassroots pressure to win political or social change. In each case, the organization's core strategic approach is based on its theory of how it can most powerfully make change occur.

Nailing down your organization's core strategic approach does not preclude it from engaging in other strategies. Most organizations use many tools to supplement and enhance their central approach, but these are support strategies employed and designed to make the organization's core strategic approach more effective. For example, many policy research organizations use media work to promote their findings and policy recommendations. And many state lobbying groups build coalitions or provide advocacy training to grassroots groups in order to advance their goals.

Often, many organizations in the same field share similar core purposes. What defines each one's special role and niche is the distinctive core strategy each employs. This core strategy becomes the organization's "signature"—the work that it's identified by, known for, and that dif-ferentiates it from other groups. For example, one state organization we know, whose purpose is to achieve economic security for low-income citizens, realized that its distinguishing approach is to first provide timely, credible, understandable data-based analysis and then use that analysis to advocate for policy change.

Why Clarify Mission?

Organizations are in essence a series of relationships built around a common mission. It is the mission that brings people together to create an organization, moves them to foster and sustain the relationships necessary for effective, productive work, revitalizes them when they're tired or discouraged, and compensates for their long hours and low pay. To spend time clarifying, or re-capturing, an organization's mission can be tantamount to recovering its soul.

> To spend time clarifying, or recapturing, an organization's mission can be tantamount to recovering its soul.

Why Mission **Creeps and Fades**

The mission is nearly always clearest for an organization at its start. Then, as the organization matures and grows, a number of forces cause its mission to creep, blur, or fade entirely away.

New people come on board, and the group grows bigger and less cohesive. The focus shifts from the central mission to individual jobs and projects. The old timers simply assume the newcomers understand the mission in the same way that they do, but never check to make sure that this is so. Over time everyone gets so caught up in day-to-day responsibilities that they do not pause to refocus on what their jobs are ultimately about. The mission of the organization turns into a litany that everyone repeats, but without inspiration, passion, or clear, shared meaning.

The more success the organization enjoys, the more opportunities come its way. Inevitably, the organization is pulled in different directions by its staff, board, funders, and other constituents. The organization finds it increasingly hard to say "no" to various stakeholders and tends to seize opportunities without first stopping to see whether or not the activities really advance its mission. Eventually the organization is moving in so many disparate directions that it is almost impossible to maintain a sense of connectedness, coherence, or singularity of mission. People on the staff and board begin to disagree about what the organization's focus and priorities should be, only to paper over their differences by agreeing to a mission statement that is so broad and inclusive that anything can fit under it.

As the organization grows older, it is forced to rely more and more on restricted grants, which in turn force it to divide into separate, semi-autonomous projects whose staffs identify more with the project than with the organization as a whole. The overall mission of the organization grows dimmer and dimmer. The more the organization resorts to special project funding, the more obscure its central mission becomes, and the harder it becomes to raise anything but special project money. Eventually the organization becomes so fragmented that it is nothing but an umbrella for separate projects—without any central core—and the overarching mission has faded entirely from sight.

If an organization wants to keep tapping into the power that a clear mission provides, it must periodically revisit the two parts of mission—core purpose and core strategic approach—and reaffirm, clarify, refine, or redefine them. These "mission checks" are always the starting point for strategic planning that will make a difference.

The Two Biggest Planning Mistakes and **How to Avoid Them**

The two biggest planning mistakes social justice organizations make are thinking in terms that are too short-range and failing to define the long-term outcomes at which their work aims.

Most activist organizations have missions that aspire to far-reaching social, political, or economic changes that may take years to achieve. Too often, however, their planning processes move from clarifying mission to describing what they intend to do over the next year or two. Critical intermediary steps are left out. How do you avoid these mistakes? By planning backwards, focusing on your long-term intended outcomes and then deriving plans from them.

How Do You Plan Backwards?

Strategic planning that makes a difference requires planning backwards. After clarifying its mission, an organization needs to identify the major long-term changes or outcomes that must occur to attain its mission, and then select which of these outcomes it will focus on by choosing those it is best-suited and best-positioned to achieve. These become the organization's central long-range goals—the set of long-term outcomes it intends to produce, each one of which will significantly contribute to fulfillment of its mission. These goals should be big and visionary, requiring ten to thirty years to accomplish, but they should also be within the realm of possibility, highly focused, and have clear finish lines. A rule of thumb is that if an organization adopts more than five central long-range goals, it is aiming too high and taking on more than most organizations can handle.

Once defined, central long-range goals delineate the boundaries of an organization's work and serve as the basis, framework, and focal point for all of its activities. Everything the organization does—today, tomorrow, this year, and over the next five years—then derives from the answers to a single question: What are the most critical things our organization can and must do to move us closer toward realizing our central long-range goals?

A state advocacy organization we know used this backward planning to become crystal clear about what it wanted to accomplish. Its mission is to establish a fair and just state criminal justice system, and it chose three central long-range goals on which to concentrate, each of which is key to attaining its mission: (1) limiting or suspending use of the death penalty; (2) establishing an indigent defense system that works; and (3) ensuring the integrity and reliability of criminal proceedings.

> Many organizations fall into the trap of merely stating what they are going to do without specifying the results these activities are intended to achieve.

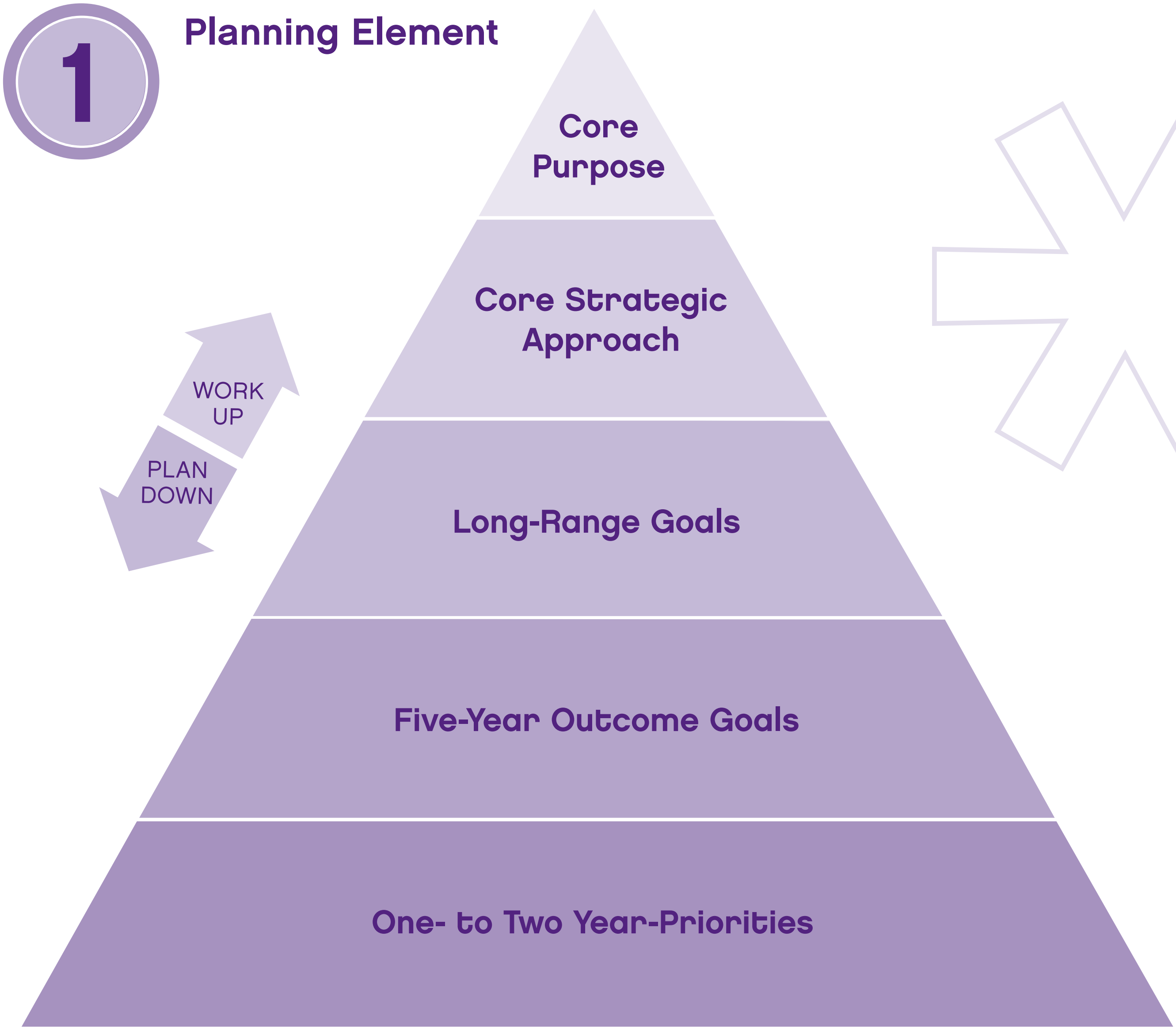
To accomplish these goals, the organization decided to focus on four main activities over the next two years: (1) eliminating the state death penalty for persons with mental retardation through legislation and/or litigation; (2) building support for a reformed indigent defense system by producing and strategically disseminating a research report that documents the inadequacies of the current system; (3) providing legal services to indigents charged with capital crimes and exposing injustices in those cases; and (4) convincing policymakers, the bar, and the public of the need for a reliable mechanism for punishing prosecutorial misconduct in state criminal proceedings by monitoring such misconduct and showing how it is undermining the integrity of the system. Each activity clearly identifies the outcome it is supposed to produce, and each near-term outcome constitutes a critical step towards the organization's long-range goals.

Many organizations fall into the trap of merely stating what they are going to do without specifying the results these activities are intended to achieve. For example, they say they'll hold a conference, or generate a research report, or expand their membership, but never make clear: Toward what end? By not articulating goals in terms of outcomes, organizations lack not only clear end points against which to measure success and progress, but also a clear, strong sense of direction that ensures that this year's activities will move them towards what they ultimately want to accomplish.

The Strategic Triangle on the next page illustrates "backward planning." The arrows (indicating "plan up" and "work down") show how each level of activity both springs from, and builds toward, the next level of intended outcomes.

Strategic Triangle

1 Planning Element


Core Purpose
Core Strategic Approach
WORK UP
PLAN DOWN
Long-Range Goals
Five-Year Outcome Goals
One- to Two Year-Priorities

2

Ask Yourself

What is our organization’s ultimate aim?

What is the main methodology, or “signature approach,” that the organization relies on to achieve its purpose?

What are the major long-term (10-20 year) outcomes that must occur to fulfill the organization’s purpose?

What are the most critical things we can achieve in the next five years to move us closer toward realizing our long-range goals?

What activities are most critical to undertake in the next one-to-two years to advance our five-year outcome goals?

3

Example For A State-Based Criminal Justice Reform Organization

To establish a fair and just criminal-justice system in the state.

Expose and rectify the flaws plaguing the criminal justice system, through research, education of key audiences, litigation for law reform, and advocacy for legislative and administrative policy reforms.

- Suspend and limit the death penalty.
- Establish an indigent defense system that works.
- Ensure the integrity and reliability of criminal procedures.

- Eliminate the death penalty for people with mental illness or mental retardation.
- Win legislation that establishes life-without-parole as a sentencing option.
- Establish mechanism for punishing misconduct by prosecutors in state criminal proceedings.

- Selecting and beginning to litigate a *habeas* case that can serve as a test of the legality of the execution of the mentally retarded.
- Producing and disseminating a research report exposing and documenting flaws in the current sentencing system.
- Ongoingly monitoring prosecutorial misconduct and its damage, to convince policymakers, the bar, and the public of the need for reform.

What’s the Difference Between **Values and Goals?**

Social justice organizations are nearly always driven by a highly cherished set of core values. These are the binding, enduring tenets and guiding principles that underlie, motivate, and shape an organization’s work. Core values function as living, breathing forces in the organization. Some are ideological values—fundamental beliefs or philosophical concepts like “We believe government can and should be a force for social good.” Others are operating values, which describe the fiercely prized way in which an organization goes about its work, such as “We base our advocacy on accurate, objective research.”

Sometimes organizations confuse their ideological values with their goals. Goals define the outcomes your organization is striving for; values explain why your organization seeks those goals. For example, the goal of the state criminal justice organization is to limit or eliminate the death penalty. The value driving that goal is the belief that every life is precious and every soul worth saving.

Some organizations fall into the trap of trying to have an outcome goal that corresponds to each and every core value they hold. Yet this mirroring often leads the organization to bite off much more than it can chew.

Like mission, an organization’s core values are usually clearest at its start. There’s no need to formally state them because the founder and his or her small band of compatriots intrinsically know what these values are. Then, as new people come on board, the organization can no longer transmit its values through osmosis and informal communication. The values that are implicit for old-timers are virtually unknown to newcomers. At this point, the core values must be explicitly articulated and made an official part of the organization’s statement of who it is. Otherwise the organization runs the danger of having its core values fade so far into the background that they dissipate, or disappear entirely.

Don't Forget Priorities!
How to Set Them and Stick to Them

For social justice organizations the only thing that's harder than setting priorities is sticking to them. Many forces push these groups to take on more than their resources can handle: donor interests; the demands of members or constituents; the passions of staff or board members; the desire to keep open every option that represents a potential funding stream; the urge to be a voice on every issue; and the sheer difficulty of saying no and making tough choices.

Yet few things interfere more with an organization's effectiveness and impact than spreading itself too thin and diffusing its resources. To make a real dent in social injustices requires focus, discipline, and scaling up—concentrating staff and resources on a limited number of issues so that, on each issue, the organization reaches a critical mass sufficient for major impact. That is why setting priorities is crucial at every stage of the planning process—when choosing central long-range goals, when establishing a three-to-five-year framework of main goals and strategies for achieving them, and when adopting an annual program plan.

> Few things interfere more with an organization's effectiveness and impact than spreading itself too thin and diffusing its resources.

To ensure they are on the same page, the organization's planners need to agree on the key factors—the criteria—they'll take into account in determining what the priorities should be. Many organizations make the mistake of adopting too many criteria and giving equal weight to each. In MAG's experience, however, not all criteria are equal. But we think should the following three criteria are mandatory. (1) The activity is critically important to the eventual achievement of the organization's mission and central long-range goals; (2) there is a unique or special contribution the organization can make, or important role it can play, that no other organization can; and (3) there is a realistic chance of progress towards the intended outcome. Unless a proposed activity meets all three, it should not be a top priority.

MAG understands from our years of work with social justice organizations how hard it is for them to cut out of their plans anything they wish they could do. In an effort to make these decisions easier, we created a clear framework for assigning priorities. We suggest applying the three mandatory criteria, as well as any other key factors you want to take into account, in order to assign each proposed goal, strategy, or activity one of the following degrees of importance:

A. Crucial for us to do this; meets all three mandatory criteria.
B. Very important to achievement of our mission and goals; we should do it if progress is possible, we have the resources to do it, and no one else can do it as well.
C. Helpful to achievement of our mission and goals, but another organization is already doing it well, or the chances of making progress are slight.

In all probability, your organization's limited resources will force it to focus almost entirely on the "A" items. You may also be able to include some "B" items (or add them if new funds come in), but you're stretching yourselves too thin if "C" items make the final list.

Extra Tips to Make Your Planning **More Valuable and Productive**

Gather information and insight from outside the organization. Planning benefits immensely by getting the perspectives of outsiders. Ask policymakers, funders, constituents, and other leaders, thinkers, and strategists in the field about your organization's strengths and weaknesses, shifts in the external environment, and other changes that might impact future work. To make sure you're getting really honest and frank answers, ask outside consultants to gather, distill, and synthesize this information confidentially.

Engage the board. Involving board members in a strategic planning process is an extremely effective way of deepening members' investment and sense of ownership in an organization—and increasing their willingness to raise funds for it. Staff members, of course, have to participate as well, to ensure that the people who must carry out the plan have had a hand in shaping it.

Make it safe to question and critique. Encourage participants in the planning process to raise questions and criticisms, and to challenge the status quo. Give them permission to dispute old orthodoxies and to examine even those aspects of the organization that have always been considered sacred. The more free-ranging the discussion, the more possibility there will be for new learning, new thinking, new ideas, new approaches, and new solutions.

Consider your organization's place in the field. Identify the areas where your organization can have a unique impact, or where it can play a role that no other group can play. But also identify the areas where partnering with other organizations will maximize your organization's effectiveness.

Don't get hung up on crafting a public document. A strategic plan is an internal document whose function is to align the board and staff and to shape the organization's activities. Though the plan is the basis for marketing and fundraising, don't get hung up on trying to craft it as a public document. After the plan is complete, your communications and fundraising experts can figure out how to translate it for outside audiences.

Adjust internal operations. Many strategic plans don't work because they lack an effective structure for implementation. A new direction often requires building new capacities, jettisoning old ones, and making significant shifts in key areas. Areas affected often include staff roles, management structure and style, board development, fundraising, and earned-income strategies. Be sure to analyze the capacities that your organization will need in order to effectively implement the plan, and follow through on the necessary changes.

Do You Want to Read More?

Here are some of MAG's favorite books about strategic planning:

Lofty Missions, Down-to-Earth Plans by V. Katsuri Rangan. Harvard Business Review, March 2004.

Building Your Company's Vision by James C. Collins and Jerry L. Porras. Harvard Business Review, September-October 1996.

Strategic Planning Workbook for Nonprofit Organizations by Bryan Barry. 1997, Amherst Wilder Foundation.

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