



# Culture Strategy & Organizational Design

## Strategic Planning Approach

### What Do We Mean When We Say Strategic Planning?

Strategic planning is a term organizations, companies, and foundations use, but it often means different things to different people. So, let's clarify what a "strategic plan" encompasses, why it is important for organizations to have one, and how we think about and do it at Raben.

At Raben, we build engagements to meet our clients' needs. We recognize that each client needs something different, depending on the organization's maturity and sophistication, the current state of the industry/sector, the societal context, and the organization's current and anticipated impact. Therefore, we tailor the process and deliverables to each organization. Yet, as we have found through a myriad of strategic planning processes, there is a consistent set of questions that should be considered and answered, coupled with a rigorous mixed-method approach (i.e., survey, focus groups, interviews) to collect qualitative and quantitative data to inform decisions.

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#### STEP ONE: *Pick a Strategic Plan Type & Identify What Facilitates the Implementation*

A strategic plan can mean many things to organizations. It is essential for an organization to understand and determine what it needs, why it needs it, and what will facilitate its implementation. Many more organizations than we like to count ask for a strategic plan that sits on a shelf, never implemented or measured. The first step is determining what you need and what needs to be developed, leveraged, or created to ensure a strategic plan is activated. The options for a "strategic plan" are as follows:

- **Refresh the organization's mission, vision, values, and goals.** This is probably the most common outcome of a strategic planning engagement. This approach allows the organization to lay out, in broad terms, how it will do its work in the coming years.

- **Develop an operating plan.** An operating plan that lays out specific activities on a clear timeline.
- **Conduct a real strategy review.** Articulate what success looks like for the organization and how they change their work to achieve that success.
- **Achieve internal alignment.** This can be a mix of the three above — refresh mission/vision/values, operating plan, and/or a strategic review — or it can be a series of conversations and documents that compile and consolidate in one place what the organization is doing, ensuring alignment across teams while engaging them.
- **Analyze and/or develop a business plan.** When sustainability and financial viability are core focuses, an organization may need to create a business plan that shows projected revenues and expenses.
- **Implementing restructuring and change management.** Some strategic planning engagements are really restructuring and/or change management exercises.

## **STEP TWO: *Determine the decision maker.***

One of the hardest things about strategic planning, and one of the reasons that plans go wrong, is because there is no clarity about who will make decisions. Determine with great clarity for internal stakeholders and external consultants who are the final decision maker(s). They are often one of the following:

- **The Executive Director / Chief Executive Officer / President.** In most cases, this is the key person for most decisions, but that is not always the case.
- **The Board and the Board Chair(s).** Boards are complex bodies that can range from being deeply involved in the intake and analysis processes to engaging later in the process and voting on the plan. In any case, assessing and determining the Board's role early on is critical.
- **The Staff.** The staff members have the most knowledge of the work and are the people who are most likely to experience a sense of change as a result of the plan. It is important to determine how to tap into staff expertise while allowing the organization the opportunity to make decisions that are unpopular with some staff members.
- **Advisory Boards or Ad Hoc Committees.** In some instances, it can often be helpful to establish a strategic plan advisory committee made up of staff and board members to help guide the work. The advisory committee gives more people an opportunity to be involved in the plan and can increase buy-in. You should determine early on what the limits of the advisory role will be.

## **STEP THREE: *Approach & Elements of the Strategic Plan***

Gathering input for the development of a strategic plan should be based on the organization's needs, budget, and decision makers. First, determine how in-depth the gathering of information should be. Second, conduct a review of the existing documents (i.e., mission, vision, values), materials and communications, previous strategic plans, accountability mechanism, efficacy of the plans, etc. It is important to understand where an organization is currently, how it is working, what its impact is, and how staff are feeling about the plan and cultural dynamics. It may include:

- **Evaluation of programs/events/activities.** Determine the level of success and impact of your current efforts and how they have been achieving or not achieving your goals and mission.
- **Assess organizational culture, accountability mechanisms, and penchant for implementation.** Understand how the organizational culture facilitates change or hampers it, and when and how the organization implemented large projects, including previous strategic plans, to leverage lessons learned and continue previous successful practices.
- **A landscape/environmental scan.** Ascertaining the field and/or movement in which the organization is, what their unique role is, how effective others feel that they are, and where they can improve. These often take the form of interviews and/or surveys with partner organizations, board members, donors/funders, thought leaders, stakeholders, recipients, and/or beneficiaries of their programs, former staff, etc.
- **Address the tensions.** Identify, speak to, and mediate or determine the answer to tensions. With most strategic plan processes, there are issues that are near and dear to people's heads and hearts that may be worth retaining or sunseting. Get those issues out on the table, and then discuss and decide. Unresolved issues will haunt you in implementation.

## **STEP FOUR: *Implementation & Managing Change***

A strategic plan isn't meant to sit on a shelf but to be lived, iterated, and measured. Organizations need to be disciplined in the implementation of the strategic plan and manage the change that may be required of their staff, programs, processes, and outcomes. Before the strategic plan is ever finalized, an organization needs to develop how it will implement the plan and what changes will be needed.

- **Define what organizational and programmatic change requires.** Create a picture of what this change means for staff, structures, processes, governance, activities/programs, outputs and outcomes, ways of working, etc.
- **Identify the resources needed to support the change.** Does the staff need professional development, does the organization need technology or systems to support the change, etc.?
- **Determine the accountability mechanisms.**

