



PART 1: UNDERSTANDING AND GETTING STARTED ON STRATEGIC PLANNING

Wednesday May 4, 2016

Q&A with Donna Lockhart continues...

- 1. Boards not engaged in Strategic Planning** – one of the primary governance roles of boards is to do planning. They are responsible/accountable to the public that they are fulfilling the mission/spending funds wisely etc. This does not mean that they can't delegate planning to someone else, like the staff, but they are still accountable for the results. So if staff go ahead and implement a new direction/program etc. without board interest/willingness, the board is ultimately accountable for the success or failure. Board members who are engaged in their communities should want to be involved. They have to support the long term viability and success of the organization. I use board in a broad way...from the first group that set up the organization (they had the dream) to those today who replace them. Planning is involved in all the functions of a board, Human Resources, Funding, Programming, Communication, Policy development etc. This problem might be lack of board orientation about their roles and responsibilities and should be clear in board recruitment. Start with the chair ...start recruiting people who are passionate about the organization; are strategic thinkers and creative.
- 2. Senior Management does not believe in the importance of strategic planning.** In most organizations, staff implement the plans developed by the board/stakeholders/volunteers and yes staff involvement. This question implies to me that senior staff had either bad experiences in the past with Str. Planning or they are afraid or they want the power and control themselves. This is sad as plans can be the glue that brings volunteers and staff together in one direction and energized to work towards the vision. You need a champion of planning in any organization. Perhaps sharing successful plans from other arts organizations; having a conversation; building more than one champion; illustrating small success based on good planning...I am sure there are more ideas could go a long way to change thinking. However, this one is challenging as well because I am assuming this senior staff is your boss with power/control over other staff and of course the board. A weaker board may allow strong staff to control direction. My view has always been that the board are the employers of senior staff and are often way to quick to give over their role to staff; staff who don't believe in planning can easily influence a board willing to give over to staff.
- 3. Challenge of capacity: Creating organizational buy-in to move past "getting by on a shoe string."** Again, like the questions above, about board

and senior staff buy-in, this is a culture that the organization has accepted...just get by. Perhaps some examples of other organizations who likely folded their doors because they had no plan or options when funding decreased are good examples of what happens when you accept the status quo. In so many cases, non-profits need to think strategically (someone in the webinar suggested getting strategic thinkers on board and this was excellent idea) and do this like a for profit business would. In order to survive, we all need to be on the leading edge. Without ideas merging and expanding how do we do this? Without constantly wanting and desiring to be better, how do we grow? This is an organizational question and issue and is related to the evolution of the culture – how and who got you to this point? Where are the champions of the organization? Doing a plan can help the organization identify this as an area to work on...start with some small ideas and get some people talking...get some people thinking differently. Drop some resources on tables for staff and volunteers to read about other arts groups and what they are doing ...I call these teachable moments. You cannot do this alone and sometimes this may be the reason that creative, energetic staff and volunteers move on to other organizations who embrace change and planning and who always want to be better than last year. “Culture” of an organization is real, how we think and act and it all evolves. This is much bigger than one person; but not to say that one person cannot in some ways start the conversation towards change. (I was at a conference this past week and got to hear the key note speaker. Something that resonated with me was “frustration is a great motivator.” Many new ideas and creative directions have come from people who were frustrated...so, if finances stop us from moving on, perhaps a small group can come together to start thinking creatively about some ideas that build the funds for new programs etc. Start with one area and build success from there. Find a way to show positively what can happen when we do things differently).

4. Resource on Difference between Mission and Mandate -

<http://www.uwex.edu/ces/leader/modules/module1/module1p1to3.pdf>

Found this resource that might be helpful. Mission being ‘what business are we in and why’ ...Mandate being more the legal stuff like incorporation documents; registration number and name or if a grant is given sometimes it is tied to serving/mandate to serve specific group or client.

Hope these ideas help with the questions posed. Great questions and no simple answers.

If you still have questions please contact me and I will try to help you!

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