

STRATEGIC PLANNING AND THINKING

The OpenSource Approach – Inclusive, Grounded in Reality, Catalyzing Action and Results

Strategic Planning is a continuous process of bridging the gap between your organization's current reality and desired future. It involves determining what you will accomplish and how you will allocate your resources to accomplish it. Strategic Planning allows a group to take an intentional pause and proactively plan for the next stage of development. The self-awareness, teamwork, and rigor required for Strategic Planning enable a group to realistically assess and systematically build capacity to advance its mission within the context in which it operates – ultimately helping to shape that context.

Strategic Planning Is Not...

- *A replacement for good instincts or imagination* – rather, it can unleash and hone your collective instincts.
- *Crisis management* – though it can help you make focused, strategic decisions when you find yourself in a crisis.
- *Operational or work planning* – though it lays the groundwork for these critical processes.

Strategic Planning also is not an event or a document. Rather, it is a mindset – a way you do everything you do. A focused Strategic Planning process can jumpstart your “strategic planning and thinking” mindset. A good planning process will answer some questions while raising new ones – and also give you the tools and flexibility to address questions, challenges, and opportunities as they arise.

Why Do It?

- ⇒ A clear, compelling direction gets everyone on the same page working for the same purpose.
- ⇒ It focuses you on your most critical choices, opportunities, and challenges.
- ⇒ The process builds a sense of teamwork, commitment, and mutual accountability.
- ⇒ The process can strengthen delivery of your programs and services, as well as your communications, advocacy, fundraising, and marketing.

OpenSource's customized approach to strategic planning includes:

- **Systematic asset-based inquiry** to provide a picture of the organization's current reality and future possibilities. Engaging Board, staff, constituents, and other stakeholders early in and throughout the process not only helps ensure a more informed and realistic plan, but also builds collective buy-in and enthusiasm for the process.
- **Facilitated dialogue and decision-making** to enable the organization's leadership to reach consensus on strategic direction and critical choices.
- Deliberate and detailed **action planning** to prioritize goals, actualize strategies, and build mutual accountability. This phase of planning includes determining the capacity needed to fulfill the organization's mission and goals, and a plan for addressing any capacity gaps.
- Delivery of a **Strategic Road Map** to document the process and key decisions and to facilitate implementation as well as continuous learning and planning.
- Targeted and tailored **capacity building** to increase the odds of successful implementation of the strategic plan. Possible topics include leadership development and strategic culture change.

Make the Plan Work for You

The written plan that emerges from the planning process provides clarity rather than certainty – it is not a box to confine you but a road map to guide you. The plan actually continues to evolve over time as new information, opportunities, and challenges emerge. The planning team may choose to change, add, or delete strategies and action steps. Any changes, however, must be intentional and systematic.

The plan gives you a standard by which to measure new opportunities, and reminds you to make thoughtful and strategic choices about what you do – and, equally important, what you don't do.

To Make the Plan a Living, Relevant, and Useful Tool:

1. Operationalize the plan by integrating the strategic goals and specific action steps into staff members' respective work plans as well as the work of Board committees.
2. Track progress through the Executive Committee or some other leadership body. Check off action steps as they have been completed, set specific work goals for the subsequent period, and identify any issues that need to be changed, added, or deleted.
3. Annually, engage the full team in a formal review and update of the plan.
4. Celebrate accomplishments along the way!
5. Undergo more comprehensive and long-term planning to clarify vision, values, mission, core strategies, over-arching goals, and a strategic action plan every 3-5 years

Anyone who has spent time near wide and wild rivers knows that crossing one on stepping stones requires first contemplating the best route. More often than not, you must change your route halfway across. But, at the very least, by planning and pursuing a route you become conscious of the choices that you are making, how far you've really come, and where you still must go.

*– Michael Shellenberger and Ted Nordhaus
environmental strategists*