

## LESSONS LEARNED ON CONDUCTING THE STRATEGIC PLANNING PROCESS FOR A NONPROFIT: WHAT WENT RIGHT AND WHAT COULD BE IMPROVED

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**W**omen At Work (WAW), a nonprofit career and resource center in Pasadena, California, suffered financially in 2009 due to the economic downturn. WAW depends on grants to finance the majority of its. The economic downturn limited the number of grants that the organization received. Also, the nationwide loss of jobs, changes in the types of jobs available, and dependence on the use of information technology affected WAW. In addition, WAW experienced greater client demand for its resources.

Embarking on a strategic planning process, which is a costly endeavor, was daunting because of the limited funds to finance the much needed project. However, Women At Work did embark on a one-year strategic planning process with a limited budget and resources. This article describes the use of project management tools and techniques used in the strategic planning process for WAW from initiation to completion. With any project, good project management reviews the lessons learned from the process, noting those events that went well and those that can be improved. The paper documents 11 lessons learned in the strategic planning process.

### STRATEGIC PLANNING AND NONPROFIT ORGANIZATIONS

This article highlights the 11 areas in the strategic planning process where lessons are delineated. They are: use project management methodology; trust the process; outline a clear process; obtain clear objectives and deliverables; use money wisely; engage the board and staff; engage the committee; write the strategic plan without delay; tackle preconceived ideas; communicate often; and be persistent.

In times of shrinking budgets, limited resources, and higher demands for services, nonprofits are challenged to realize their mission, vision, and values. The strategic planning process allows the organization the time to reflect and plan for the future. Strategic planning is important because of “its ability to help organizations and communities anticipate and respond to change in wise and effective ways” (Bryson, 2011, p. 26). There are multiple models that exist in the for-profit, government, and nonprofit sectors when conducting a strategic plan (Moore, 2000), but the literature in this area remains sparse (McHatton, Bradshaw, Gallagher, & Reeves, 2011).

Women At Work (WAW) embarked on a strategic planning process in January 2010 that took one year to complete. This article details the reasons for the project’s success, including knowledge of project management methodology; dedication by the executive committee; commitment by the strategic

planning committee; knowledge on running a strategic planning process; and perseverance of the process through to completion.

Many of the principles of project management as identified by the Project Management Institute (PMI) were utilized while facilitating the strategic planning process. A few of the important principles are: to set clear goals and expectations; define tasks; use a project schedule; manage scope creep; regulate the team members' workload; and control the budget. Using project management principles to manage the strategic planning process requires taking a global view. This perspective differs from other articles written on strategic planning. Many texts and articles written on strategic planning discuss concepts, procedures, and tools to assist in the strategic planning tasks (Craft, 2006; Kerzner, 2003; Koteen, 1997). This article illustrates the tools and techniques that were used to aid planning and controlling project activities. One technique in project management methodology is to review those lessons learned in a project; a review of what went right and what could be improved.

## BACKGROUND

Women At Work was founded in 1979 by three visionaries; Betty Ann Jansson, Marge Leighton and Barbara Burke. The organization began by offering a resource room equipped with job listings and library books on women's employment, as well as holding seminars and workshops on career fields and career planning. Over the past three decades, WAW has provided job skills training, employment preparation and job search services to thousands of job seekers.

The primary function of WAW is to serve as a job counseling and resource center. The

organization kept a pulse on evolving times by offering women services that were not available elsewhere in the community. Early on, the development of employer forums provided a way for women to network with human resource professionals in a private and safe environment. Program funding was targeted to help women obtain information on employment opportunities, to start their own businesses, and to compete effectively in the workplace. The organization continued to evolve to meet the demands of a growing technological society. Paper-based systems of the past began to be replaced with computer information systems. As the Internet emerged as a significant tool for job searches, programs expanded to include computer classes and workshops that would fill the need for basic information and training in the technical arena. WAW provides individualized employment services to clients that emphasize self-appreciation, self-determination, confidence and capabilities. The resource room and career planning library continue to provide information on current job openings provided by local businesses and industries.

The economic downturn in 2009 had a negative financial impact on WAW. Funding from government and private organizations dwindled while the demand for WAW services increased. Embarking on a strategic planning process, while expensive, was necessary due to a change in economic factors.

## LITERATURE REVIEW

The literature on strategic planning may be divided into three categories: for-profit, nonprofit, and government organizations (Moore, 2000). What sets them apart from one another is the organizational purpose usually defined by its mission statement and

the ability to deliver value in form of products, services, or social programs. Whether for-profit, nonprofit or governmental, the seminal writers on strategy agree that organizations benefit from developing a strategic plan (Moore, 2000). Moore states that all three sectors need strategies to remain purposeful and effective (Moore, 2000).

There are effective strategic planning processes and models designed for nonprofit organizations. Texts and workbooks exist on how to run a strategic planning process for nonprofit organizations (Allison & Kaye, 2005; Barry, 1997; Mintzberg & Quinn, 1996). Also, literature in the form of journal articles and research exist on strategic planning designed for nonprofit organizations (Bradach, Tierney, & Stone, 2008; Craft & Benson, 2006; McClamroch, Byrd, & Sowell, 2001).

The literature identifies a number of factors critical to the success of a strategic planning effort. One factor associated with the success of strategic planning is leadership (Moxley, 2004; McClamroch, Byrd, & Sowell, 2001). Moxley (2004) and McClamroch, Byrd, and Sowell (2001) attribute successful strategic plans to strong leaders who value a collaborative approach to planning.

McClamroch, Byrd, and Sowell (2001) analyzed the strategic planning process in a large university library system. Their model emphasized consensus, buy-in, and collaboration as indicators of success.

Mittenthal (2004) lists ten keys to successful strategic planning from nonprofit organizations whose plans proved effective. The 10 keys are: uncover opportunities and challenges; assess strengths and limitations; use an inclusive approach; create an

empowered planning committee; involve senior leadership; share responsibility; learn from best practices; establish clear priorities and an implementation plan; have patience; and commit to change.

Another factor important to strategic planning is to monitor implementation progress (Craft & Benson, 2006). An analysis of hundreds of strategic plans developed by school districts, schools, and central office departments, revealed that the monitoring techniques of the strategies, goals and objectives contributed to the success of the plans.

What does not appear in the literature is the use of project management principles and practices to facilitate the strategic planning process. Several articles on linking strategic planning with project management practices discuss using the practice after the planning process is completed (Knutson, 2003); using the practice to build a project office (Kerzner, 2003); or the fit between an organization's strategy, the project management system it chooses to implement, and the type of project that it executes in implementing its strategy (Cooke-Davies, Crawford, & Lechler, 2009).

The Project Management Institute (PMI) defines project management as the application of knowledge, skills, and techniques to execute projects effectively and efficiently to tie project results to business goals (PMBOK, 2008). The objective of a practitioner experienced in the art of project management is to move projects from inception to completion using a methodological process while controlling the risks that often impact successful implementation. PMI defines a successful project as meeting the published schedule, controlling the project's budget and accomplishing the project's requirements (PMBOK, 2008).

## LESSONS LEARNED IN THE STRATEGIC PLANNING PROCESS

### 1. Use Project Management Methodology

Project management methodology describes the phases, activities, and tasks required to undertake a project from start to finish. The methodology is based on a standard framework for undertaking projects. “Project management methodology bridges the gap between company strategy and individual projects, between setting goals and achieving those goals” (Leemann, 2003, p. 2). The technique of effective project management implies that a project can be controlled. The focus on resource allocation, budgets, schedules, quality and risk can all be controlled if the project is managed effectively.

The use of project management methodology in the strategic planning process was beneficial to the organization. First, the methodology provides structure to manage the strategic planning project. Projects typically pass sequentially through the stages of initiating, planning, executing, monitoring and controlling. In managing the strategic planning process, the various phases of the project management process parallel the strategic planning process; define where the organization is, where it wants to be, and how it will get there. Second, the project management methodology has known tools and techniques that are used on projects which save time and enhance the process. These tools and techniques are described in subsequent lessons learned throughout the article. Finally, project management methodology views all aspects of a project; this includes:

- *project integration management*, a coordinated effort to view the entire

project not just the individual parts of a project;

- *project scope management*, ability to capture all of the requirements for a project;
- *time management*, ensures that the project is completed as scheduled;
- *cost management*, ensures that the project is completed on budget;
- *human resources management*, includes all of the processes used to develop, manage, and put the project team together;
- *communications management*, determines what information is needed, how that information is sent and managed, and how project performance is reported;
- *risk management*, involves identifying, managing, and controlling risk of a project; and finally,
- *procurement management*, the processes used to acquire the materials and services needed to complete the project (Project Management Institute, 2008).

The Project Management Institute defines the term lessons learned as “the learning gained from the process of performing the project” (PMBOK, 2008), such as the activities of a project that went well or could be improved. Several lessons learned through the strategic planning process were alleviated because of knowledge of project management tools and techniques. These lessons learned are incorporated in the article because if missed or left out of the strategic planning process, implications for future strategic planning projects could be compromised.

## 2. Trust the Process

There is a fundamental approach to the strategic planning process. Regardless of the books or texts written to facilitate effective strategic planning, various tasks must be incorporated within the phases of the process to be successful. The committee, board, and staff must trust the strategic planning process, even though at times it is daunting. The length of time allotted for the plan and the lack of individuals on the board and staff familiar with a strategic planning process can stall the process and leave people feeling frustrated.

There are multiple models on how to run a strategic planning process (Allison & Kaye, 2005; Barry, 1997; Mintzberg & Quinn, 1996). The fundamental approach includes assessing what the organization is doing now; what is happening in the environment to impact the organization; what are the organization's strengths, weaknesses, opportunities and challenges; and finally, what the organization should be doing. The issue is not which approach to use but to choose an approach and follow through. Identifying the steps in a strategic planning model informs those involved that strategic planning is a process. As the tasks of the plan are identified in the work plan, the participants can see the prerequisites, dependencies, and dates of the identified tasks. The strategic planning process is given structure thus providing confidence in the process.

Once the strategies, goals, and objectives are accepted by the board, identifying which specific objectives the organization will focus on in the next fiscal year is a relatively easy task. The executive director and president of the board usually have a sense as to the direction of the organization and of the tasks that must begin within the year. The strategic planning process highlights those

activities that must be addressed as soon as possible and those that can wait for another year or two. This is because the issues facing the organization are highlighted during the strategic planning process and cannot be ignored. For example, one immediate goal for the organization was to develop a fee system to ensure access for all income levels to participate in WAW programs and services. This goal is directly in line with the mission and values of the organization. On the other hand, a goal to develop and implement an enhanced financial fund accounting system was postponed for two years.

The strategic plan is then translated into an annual operating plan. The operating plan must be monitored at the end of each year to ensure the organization is following the strategic direction set by the board (Craft & Benson, 2006).

## 3. Outline a Clear Process

One tool that project managers depend on is a work plan. A work plan for managing the strategic planning process was created and followed from inception through to implementation. The work plan was written and managed in Excel and lists the activities of the strategic planning process. The columns of the work plan included: Activities, Activity Descriptions, Activity Start Date, Activity End Date, Responsibility (persons responsible for executing or overseeing the activity), and Activity Status (in progress, completed, or canceled).

The work plan was divided into five phases outlining the strategic planning process: (1) Get Organized and Plan, (2) Take Stock, (3) Set Direction, (4) Refine and Adopt the Plan, and (5) Implement the Plan. The

phases of the work plan corresponded to the phases of the strategic planning process that the committee followed as outlined by Bryan W. Barry in 1997, *Strategic Planning Workbook for Nonprofit Organizations*. This is a simple, straightforward, and easy-to-use process for any group unfamiliar with strategic planning.

In Scott Berkun's book (2005), *The Art of Project Management*, he explains traditional project management skills such as planning, scheduling, and requirements gathering and people management skills such as leadership, trust and communication that successful project managers possess. According to Berkun, "the absence of a project manager creates dysfunction. Without a person whose primary job is to shepherd the overall effort, individual biases and interests can derail the directions of the team" (Berkun, 2005, p. 8). The first goal when embarking on a strategic planning process is to assign a leader or co-leaders. This person's responsibility is to move the planning process forward by having a clear process outlined. A comprehensive, detailed roadmap is essential to the strategic planning process and its successful completion.

Although a good plan is critical it must be flexible. That is, the plan must be updated and modified based upon the nuances of the committee and process; for example, sometimes meetings were canceled due to conflicting activities and there were times when additional meetings were scheduled because more discussion on specific topics were required. Therefore, it is important to be organized but at the same time flexible to enable an effective and workable process.

#### 4. Obtain Clear Objectives and Deliverables

To start the strategic planning process, commitment from the executive director and board president are vital. The executive director and the board president's support and involvement are needed to keep the strategic planning process moving forward, to generate support among board members, and to provide resources. Michael Allison and Jude Kaye in *Strategic Planning for Nonprofit Organizations* state that "chief among the prerequisites [for successful planning] is a true commitment to the planning process by the executive director and board leadership" (Allison & Kaye, 2005, p. 31). McClamroch, Byrd, and Sowell (2001) agree by stating: "The planning model, through its inclusive approach, encourages consensus, buy-in, and collaboration. Such a change effort, however, will not succeed without effective leadership."

Koteen dedicates several chapters in his 1997 text *Strategic Management in Public and Nonprofit Organizations* on the role of the chief executive as manager of strategy. He explains that the chief executive is the "change agent" within the organization. It is the role of the chief executive to provide the leadership for the importance of the strategic planning process and the success of the organization's future. Creating the proper organizational climate and attitude and modeling behaviors to get involved with the process, rather than resist formal strategic management, is the role of an effective change agent (Koteen, 1997).

Alternatively, Bryson views directing the strategic planning process as a team effort (Bryson, 2011). The executives, leaders, managers, and key stakeholders have an opportunity to sponsor, facilitate, and foster the strategic process to make and implement strategies for the benefit of the organization.

While the strategic planning process is a team effort, having a chair of the planning committee with the support of the executive director was significant in completing the project on time and within budget. There were various times throughout the strategic planning process where the momentum dwindled due to committee members' personal schedule conflicts for meetings, WAW events that conflicted with meetings, and lack of attention paid to document submission and review due dates. The executive director was able to step in and maintain scheduled dates for meetings, and obtain continued commitment on deliverable dates.

In project management methodology, development of a project charter and project scope statements are completed when a project begins. The purpose of the documents is to collect information on the purpose of the project and why it is being undertaken. Information to identify the project stakeholders and the person(s) empowered to make decisions regarding project deliverables, schedule, and budget are fundamental to project success. It was important that the executive director and board president achieved a common understanding of the project's expected outcomes, what was in scope and what was out of scope. The formality of writing the project charter and project scope statement was not done. However, obtaining the information that would have been contained within these documents was completed.

I met independently with the executive director and board president at the beginning of the year, February 2010, to determine their commitment, expectations, and support for the strategic planning process by asking the questions in Table 1.

**Questions Pertaining to the Strategic Planning Process**

1	What is the budget for the strategic planning process?
2	What is the time frame for the strategic planning process?
3	How many years is the strategic plan to focus? Three or five?
4	What is your ultimate goal for the strategic planning process? What are your expectations for the outcome?
5	Do you agree on a strategic planning committee to set the strategy and present it to the board for approval?
6	What are the roles and expectations of the strategic planning committee? Who is writing the strategic plan?
7	Do you know a consultant who specializes in strategic planning? What is the role of the consultant?
8	Do you have an expectation on how to organize the SWOT (obtaining information for the strengths, weaknesses, opportunities and threats/challenges of the organization)?
9	How much involvement on the part of the board and staff members do you want or expect?
10	Who is available to put together the background information on the organization? For example: budget reports, annual plans, current projects, etc.?
11	What worked or did not work in the previous strategic planning process?
12	How do you want to keep the board and staff informed on the strategic planning process?

**Table 1 Questions Pertaining to Strategic Planning**

After completing the interviews there was no need for assumptions, since it was clear that the objectives and deliverables would include: the strategic planning document, the budget to complete the task, and the timeline to accomplish the goal. Documentation on both meetings was written and distributed to the executive director and board president for final acceptance before the process began.

### 5. Use Money Wisely

Women At Work was impacted by the economic crisis, as a result funding for the strategic planning process was minimal. Initially, WAW sent requests for proposals to various consulting agencies to conduct the strategic planning process. But the proposed costs were more than the organization was willing or able to spend. To keep costs down, the executive director and president of the board took the following steps:

- a. Ask a board member with experience to lead the strategic planning process
- b. Hire a consultant for specific tasks; facilitate the board retreat, facilitate focus group, prepare questionnaires, and synthesize the information from focus groups and questionnaires
- c. Solicit help from past board presidents or board members with experience. WAW asked the previous board president to facilitate a focus group and assist in writing the strategic plan document.

Funds allocated to the strategic planning process were used to hire a consultant who added considerable value (both guidance and insight). The consultant was familiar with the organizational culture and nonprofit organizations. Every organization has a specific culture. Working within an unknown culture can present obstacles to get the job done effectively and efficiently. Therefore,

someone who is familiar with the culture or can grasp the nuances of the organization quickly can begin working successfully within the environment.

It is also important to get an “outsider’s” viewpoint on the organization when conducting a strategic planning process. The issues that the organization faces can be clouded by those attached to the organization due to familiarity. Also, the consultant can bring unknown issues to the attention of the strategic planning committee.

The consultant hired was attentive to these issues, plus she completed the most laborious and time-consuming tasks. Compiling the SWOT (Strengths, Weaknesses, Opportunities and Threats) assessment for the initial board and staff retreat, preparing questionnaires for distribution to the various communities with which the organization interfaces and synthesizing the results for interpretation is a vital part of the process for which she was responsible. In large part, the success of the project was attributable to her work.

### 6. Engage the Board and Staff

The strategic planning committee scheduled a board and staff retreat to initiate the strategic planning process. Committee members discussed the importance to create a forum focused on issues important to the organization, where they brainstormed and shared ideas. Prior to the retreat, an initial SWOT assessment was administered to the board and staff soliciting topics worthy for discussion at the retreat. The five topics identified for discussion at the retreat were: Fundraising, Facilities and Technology, Programs, Operations and Administration, and Governance.

The first board and staff meeting set the tone for the strategic planning process. The board and staff were engaged because the information culled set the priorities for discussion while engaging all of the members. At the retreat, the members were divided into five groups based upon individual background and level of interest of the topic. The strategy was to have small breakout sessions to discuss each of the five topics with specific objectives on how to move the organization forward in that area. Presentation to the larger group followed to solicit input from all members on each topic. The output of the session was a workable list of activities when deciding the strategies, goals and objectives of the organization to incorporate in the strategic plan.

## 7. Engage the Committee

The executive director, executive team, board, and staff were committed to the strategic planning process. After discussing the strategic planning approach with the executive director, board president, board and staff, the tenor of the organization was positive and there was no indication of barriers to impede the process. The organization seemed ready to embark on the strategic planning process.

The first plan of action was to select members of the planning committee who know the organization well, are committed to attending meetings, and are willing to participate. The intent was to keep the committee small, six or seven in number, so all committee members would feel engaged. The primary responsibility of the planning committee is to manage and facilitate the planning process (McClamroch, Byrd, & Sowell, 2001).

The members of the committee were: executive director, president of the board, vice president of the board, a member of the staff, a member of the board, a consultant, and a staff consultant. The executive director, president of the board, and vice president of the board, who have a real interest and commitment to the strategic plan, were naturally on the committee. The board member was chosen due to familiarity with the strategic planning process. The staff member was chosen due to her familiarity with the organization. The staff consultant was chosen to write the strategic plan. The consultant prepared the questionnaires, facilitated board and staff sessions, facilitated the focus groups, and synthesized all data.

One major issue with the committee was frequent absences of members from meetings and drop-outs of committee members. The committee needs enough people to cover absences and drop-outs, but too many members will hinder committee engagement. Also, nonprofit organizations rely on volunteers to “fill gaps” of the employee. Because volunteers are not paid employees, motivation to contribute over time must be sustained by recognition, praise, and flexibility to schedules.

Expectations on committee involvement were expressed and discussed. However, participation was erratic. It was not clear whether it was the number of people on the committee or the people on the committee, but the enthusiasm for information exchange was not there until the end of the process when the entire team began to attend the meetings. Regardless, the synergy and momentum of the meetings are lost if the committee members do not attend regularly scheduled meetings. The people on the

committee need to be engaged in the strategic planning process and express opinions; people selected should be visionaries and thinkers. Members should be encouraged to engage in debate on the direction of the organization without feeling inhibited. Overall, the members worked hard on the strategic plan process. The work plan was consistently reviewed so there was a clear understanding of activities that were completed, in process, or yet to be accomplished.

### **8. Write the Strategic Plan Without Delay**

A good approach to writing a strategic plan document is to begin immediately. Several sections include: mission, vision, and values statements; and history and profile of the organization. This information can be compiled and written quickly with the first draft of the strategic plan document distributed to the committee for review. Meanwhile, the SWOT analysis and information gathering process is conducted. The second draft is distributed after information analysis and the strategies, goals, and objectives are written. By the time the strategies, goals, and objectives are completed, the committee is looking forward to wrapping up because collection, analysis, and synthesis of the data involve a long and intense process. Therefore, it is a good idea to start writing the strategic planning document early because the energy of the committee becomes depleted at this point in the process.

Another condition for success is clarity in the roles and expectations for all participants in the planning process and on the committee. One of the key roles in the strategic planning process is the person to write the strategic plan. Initially, a staff consultant who was the grant writer for the organization was recruited

to write the strategic plan. Her knowledge of the organization and proficient writing skills made her an excellent choice. Due to other commitments within the organization, the grant writer had to back out of the committee, and thus the writing of the plan. That left a void and delay in the process regarding who was going to write various sections of the document. A better idea is to have several people write different sections of the document and several people edit the document after completion to ensure consistency and readability. This way, the burden of writing the document is not left to one person and selection of an editor could be postponed until the end of the process.

### **9. Tackle Preconceived Ideas**

The vision, mission, and values statements of an organization are important to the strategic planning process and must be in alignment with the strategies developed (Moore, 2000; Moxley, 2004). A review of vision, mission, and values statements of the organization, what they are and how they relate to the organization, should be conducted early in the process. Changes to the vision, mission, and values statements of the organizations should be done after the SWOT analysis and the direction of the organization is agreed upon by the board.

Strategic planning has a specific language all its own. The individuals on the board, staff and committee may not be familiar with strategic planning language. Those individuals who have participated in a strategic planning process probably used different terminology. The terms that are used in strategic planning have different meanings to different people. It is extremely important that everyone is educated on the strategic

planning process and uses the same terminology.

A “terms document” was created to define vision, mission, and values for the board and strategic planning committee. Research on various local organizations’ vision, mission, and values statements was presented to the board and committee. Familiarity with organizations in the area reinforced the definition of terms and usage for our organization.

Terms such as strategy, goals and objectives are not standard in the strategic planning process. Defining and agreeing on essential terms in the process is critical. “Terminology is important only to make the planning process productive” (Craft & Benson, 2006, p. 24). If critical terms are not agreed upon and defined then time is wasted on discussing the terminology rather than reaching the strategic planning objective. The language of the strategic planning process must be used and corrected when misused. This facilitates the board, staff, and committee using a common and familiar strategic planning language over time.

The strategic planning language must be defined and used by everyone involved in the same way with the planning. Even when strategic planning language is presented, discussed, and reviewed – it is not “accepted” by committee until it is time to write the strategic plan. This is usually when issues with the strategic language surface. Michael Allison and Jude Kaye (2005) in *Strategic Planning for Nonprofit Organizations* emphasize that everyone involved in the strategic planning process should use the same definitions, because there is no agreement on the definition of planning words in the profit or nonprofit sectors. They continue to support

the fact that speaking the same language is important when preparing a strategic plan.

Early on in the process, the “terms document” was presented and reviewed by the committee and used throughout the process when disagreements occurred. Frustration was exhibited by one committee member during the process because the definitions of terms used in this organization were different from those she had used in strategic planning for other nonprofit organizations. What ensued was a change to the “conventional terms” used in strategic planning. The term “goal” was changed to “target.” The term “strategy” was changed to “goal.” The chaos of the meeting escalated to other areas of the strategic planning process. Instead of the conventional three to five strategies over a period of three to five years the number of strategies escalated to eight.

As a leader of the process, I politely commented on the unconventional use of terms and the number of strategies in trying to steer the committee members back to using conventional terms. However, I could tell there was significant frustration exhibited by the committee members at this time. Therefore, I did not pursue the discussion further. At a subsequent meeting, the original document was presented where the terms were defined. As this document was used at the beginning of the process it was familiar to the committee. After a quick review with the committee, the conventional language and process were adopted without further resistance.

## 10. Communicate Often

One aspect of the project management methodology is communications management. There are a number of groups

and people who must be informed on the strategic planning progress. The following areas note the managed effort in communicating with those involved with the process.

- a. *Make a presentation to the board and staff.* A presentation to the board and staff on the five-phase strategic planning process was scheduled. The idea was to communicate the various phases of the strategic planning process, verify that the people involved in the process received the same information, and field questions regarding the budget, time frame, and resources for the project.
- b. *Create a work plan.* A work plan outlining the various phases, complete with activities and dates associated with the activity, was created and maintained. The work plan was brought to meetings to review and monitor status. The work plan should be updated before each committee meeting and reviewed at each meeting--what was accomplished, what is in process, and what still needs to be completed. The work plan along with a status report is to be distributed monthly to the board and staff. Also, the work plan must be brought to all meetings; strategic planning committee meetings, board meetings, and staff meetings to update the committee, board and staff continually on the status of the project. Because of the various phases of the strategic planning process and activities within each phase, it is easy to lose focus as to the phase and activity in process and what is left to complete. Reviewing the work plan also provides an opportunity to reinforce the non-familiar terminology associated with the strategic planning process.

- c. *Provide an update to the board and staff.* Creating status reports for distribution to the board and staff each month is also wise. Even though the committee was well aware of the status of the project, they were included in distribution.

The board meetings at Women At Work went to using a "consent agenda." A consent agenda is a practice by which repetitive board action items are organized apart from the rest of the agenda and approved as a group. Status reports, on the repetitive action items, are distributed prior to the meeting to expedite formal board approval. One of the "negatives" to a consent agenda is not guaranteeing board preparation on the issues. It is unknown if all board members read the various group status reports prior to the board meetings.

Even if a consent agenda is practiced, suggestions and feedback from the board on the strategic planning process are important. The strategic plan must be added as an agenda item at each board meeting. Each month, the board should be informed of major accomplishments, and provide time to discuss issues and ask questions relevant to the process. The board needs to feel engaged in the process over the course of events and knowledgeable as to the content of the strategic plan before it is first presented for review. The staff should be updated on a monthly basis as well. A good idea is to have the person who represents the staff on the strategic plan committee provide an update at staff meetings and to field questions.

- d. *Document all meetings.* Documentation on meetings was written and distributed to the committee prior to the next scheduled meeting. The meeting notes were

reviewed at the beginning of the next meeting. While taking meeting notes is a tedious task, notes are needed when decisions made at a meeting need verification.

### 11. Be Persistent

The strategic planning process can be overwhelming. We planned for the process at WAW to take a year; however, there are obstacles that can prolong the process which organizations need to consider. If the work plan is set up and followed consistently, then the committee members should be aware of the process, meetings and events. In our case, the work plan was followed and adjustments were made when indicated.

There are times when one or two committee members could not attend meetings. The meetings were rescheduled only when an organizational event would have interrupted a scheduled meeting. Because of inconsistent attendance, notes on all meetings were logged, distributed to the committee after the meeting, and reviewed at the beginning of the next meeting.

Good meeting etiquette is essential. The committee members knew a meeting agenda was written and followed which included beginning and ending meetings on time. The strategic planning process is a significant time commitment for those involved on the committee. It is important to recognize the committee members' time and meetings should be scheduled only when there is a purpose to meet.

### FINAL NOTES

The result of the strategic planning process provides an organization with a number of

advantages. First, the organization identifies the core strategies for the work ahead including goals and objectives. Work plans are included in the strategic plan to outline the timeframe for meeting the goals and objectives. Aligning capable individuals to fill the positions needed to implement the plans is vital to achieving the goals and objectives. The individuals, once hired, know what the job entails and can be measured effectively against specific goals and objectives.

Second, a change of leadership should not shift the focus of the organization. A structure has been put in place and the future work identified. The board, staff, and stakeholders were involved in the strategic planning process and must be involved with the evaluation of the plan over the five-year implementation period.

Lastly, the strategic plan is a compilation of countless hours of input and ideas proposed by board, staff, volunteers, community leaders, clients and many others who care about the organization and want the good work done by WAW to continue.

As the implementation of the plan begins, there will be challenges and hurdles ahead. There is much more to accomplish, and there is a much greater impact that the organization can have on both women and men. Bettering the lives of many and reaching out to help and assist is the major cornerstone of WAW. The strategic plan should be viewed as a working document. Many people are interested in the success of the organization and as the environment changes or key issues affect the organization, the process should be strong enough to incorporate flexibility.

The use of project management methodology in the strategic planning process that WAW followed might benefit other nonprofit organizations by presenting the lessons learned. The methodology is based on learning and applying the practices of project initiation, planning, monitoring, controlling and formally closing all activities. The use of the methodology recognizes the whole process and not just the individual parts; methodology provides structure to limit chaos and help the project manager focus on all aspects of the project. For example, often there is a tendency to dive right in and start activities rather than to take the necessary time to plan and discuss all the activities first. It is important to understand the entire scope of the project to ensure the goals of the project will be met.

Next, project management tools and techniques are routinely used by project managers. Some of the tools discussed in the article were questionnaires to determine the

scope of the project, use of a work plan to manage the project activities, and methods available to facilitate effective communication with the project's stakeholders.

In conclusion, the successful close of a project should not be overlooked. A proper conclusion would include: verifying all activities in the work plan are completed, communicating to stakeholders that all deliverables are acceptable, and conducting a project's lessons learned session; identifying successful project activities and those that could be improved. Project management is a process that guides the project to achieve the desired goals. It is not an exercise in generating more work or overhead. With project management methodology, it is necessary to plan, stay focused, and persevere through the phases of the strategic planning process and the result will be a successful and necessary venture.



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