# 3. One Planning Approach

**A Strategic Plan Task Force (Small Teams with Big Tasks!)**

**Here is one planning model to consider.** Use this 3-ring binder table of contents to create **“The Rolling 3-Year Strategic Plan Process and Schedule.”** This worksheet lists the chronological steps a task force might follow when creating the strategic plan. Small teams will address niche assignments and then share critical information and findings with the task force, culminating in the one-page Strategic Plan Placemat. See the following pages for the commentary on the small teams and their big tasks!

## ABC Organization’s Rolling 3-Year Strategic Plan Process and Schedule[[1]](#footnote-1)

**GOAL:** Final Draft (Version 4.0) to Board: Sept. 15, 2020 Deadline

**Updated by:** Emelia Anderson on March 1, 2020

**3-RING BINDER TABLE OF CONTENTS** (15 tabs)

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| **TAB** | **Good – I’ll be there!** | **Champion\***  \*Appointed on 12/15/19 | **1st Draft Deadline** |
| 12 | **Planning to Plan: Readiness Assessment**  The 7 Reasons Why Strategic Plans Fail | Facilitator |  |
| 12 | **The 5 Most Important Questions You Will Ever Ask**  **About Your Organization** (Jan. 8 session) | Facilitator |  |
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| 5 | Our Customers and What They Value |  |  |
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| 2 | Organization-at-a-Glance & Historical Snapshot |  |  |
| 3A | Executive Summary |  |  |
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|  | **SUPPLEMENTARY RESOURCES:** | | |
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| 14 | ***HOOPLA!*** Celebration |  |  |
| 15 | Update of Annual Planning Calendar |  |  |

## 5 Elements

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| * **1. The Process** | Select a facilitator/consultant that has a track record for scaling Mt. Everest—and empower that person to select the methodology that has worked well for him or her in the past. |
| * **2. The People** | Board/staff task force? Staff-only task force with regular updates to the board? Either way, leverage their CliftonStrengths®. |
| * **3. The Placemat** | Wordsmith the one-page placemat with prayerful discernment and an eye to communicating the plan to multiple customers (board, staff, donors, clients, volunteers, etc.). |
| * **4. The Proclamation** | Get the plan off the shelf and into the streets! Completing the plan is just the start. Now you must sell the plan. |
| * **5. The Progress** | Monitor Results: Dashboards. Targets. Measurements. Metrics. Monthly Updates. *Make strategic planning an on-going, year-round process—not a one-time event.* |

**7 Steps**

* **Step 1: Appoint a Task Force**—generally a combination of key staff and two or three board members.
* **Step 2: Create the Planning Calendar**—for most organizations without a written strategic plan, this process might range from three to nine months.
* **Step 3: Seek buy-in**—ensure that the CEO (or senior pastor), senior team, and the board agree that the time is right for a strategic planning process and that there is passion, time, and budget to accomplish the plan. (*You never have a second change to make a first impression*.)
* **Step 4: Appoint or retain a Facilitator or Consultant**—discern if you have internal expertise to facilitate this process or if you need to recruit a volunteer or retain a consultant.
* **Step 5: Appoint “Champions”** for each section of the plan (Tabs 1 to 15). If this is your first plan, the CEO may prefer to be the champion for Tab 4: Mission, Vision, Values, BHAG.
* **Step 6: Plan a *HOOPLA!* Celebration**—create the expectation that you will be successful and put a celebration date on the calendar and assign your best party-planner to organize the event.[[2]](#footnote-2)
* **Step 7: Affirm the Annual Planning Calendar**—to ensure that this is a “rolling” three-year plan (that adds more one year every year—so you are always looking ahead three years), set key target dates for the next 12 months. Build strategic planning into the DNA of your organization so it’s similar to your budgeting and monthly financial reporting cycle—*not a one-time annual event that provokes groans and excuses!*

## Commentary on Strategic Plan Team Tasks Small Teams with Big Tasks!

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| **TAB** | **Strategic Plan Teams and Tasks** | **These tasks are generally completed in this chronological order—each task builds upon the previous team’s work.** |
| 12 | **Planning to Plan: Readiness Assessment** The 7 Reasons Why Strategic Plans Fail | In the first session with the board and the senior team (or perhaps the senior team and middle management), use this “pop quiz” to assess the organization’s previous experience. |
| 12 | **The 5 Most Important Questions You Will Ever Ask About Your Organization:**  #1. What is our mission?  #2. Who is our customer?  #3. What does the customer value?  #4. What are our results?  #5. What is our plan? | **Resources/outline for the 1- or 2-day planning retreat:**   * \**Peter Drucker’s Five Most Important Questions: Enduring Wisdom for Today’s Leaders*, by Peter F. Drucker, Frances Hesselbein, Joan Snyder Kuhl (Hoboken, NJ: John Wiley & Sons, Inc., 2015) * *Peter F. Drucker’s The Five Most Important Questions Self-Assessment Tool: Facilitator’s Guide*, Third Edition (San Francisco: Jossey-Bass, 2010) * *Peter F. Drucker’s The Five Most Important Questions Self-Assessment Tool: Participant Guide*, Third Edition (San Francisco: Jossey-Bass, 2010)   \*Required reading for all staff, board and team members. |
| 4 | Mission, Vision, Values, BHAG | **Mission:** why we exist  **Values:** how we will treat each other and our constituents  **Vision:** what we want to be in the future  **BHAG:** our Big HOLY Audacious Goal for X years ahead |
| 5 | Our Customers and What They Value | Use the Drucker materials to discern:   * Our primary customer: “The person whose life is changed because of our work.” * Supporting customers: list the categories (donors,   vendors, churches, grandparents of clients, etc.) |
| 6A | Environmental Scan | Google “environmental scan” and document both external and internal issues that will impact your plan. |
| 6B | S.W.O.T. Analysis | Survey stakeholders and assess: Strengths, Weaknesses, Opportunities, Threats (S.W.O.T.) |
| 6C | Trends (and Trend-Spotting Exercise) | See Tool #15: Board Retreat Trend-Spotting Exercise |
| 6D | Assumptions (“The Radar Report”) | Identify your Top-10 assumptions that undergird your plan (example: “Giving will decrease due to aging donor base.”). List the assumptions on a one-page questionnaire, “The Radar Report,” and ask dozens (or hundreds) of people to evaluate if those assumptions  are correct or not. |

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| **TAB** | **Strategic Plan Teams and Tasks** | **These tasks are generally completed in this chronological order—each task builds upon the previous team’s work.** |
| 7 | Spiritual Discernment Process | This team solicits prayer requests from all the teams— and inspires all teams to discern God’s voice. Some teams read Ruth Haley Barton’s book, *Pursuing God’s Will Together: A Discernment Practice for Leadership Groups*. |
| 8 | Three-Year Visionary Priorities (by department) | This team provides templates and instructions so each department will discern three to five “visionary priorities.” |
| 9 | Top-5 Goals for Year One | After each department has submitted their visionary priorities, this team will recommend to the Task Force the Top-5 Organizational Goals for the first year of the rolling three-year plan. |
| 10 | Board & Senior Team  S.M.A.R.T. Goals and Monthly Dashboard Reports | See Tool #11, “Monthly Dashboard Report,” for the template for creating and reporting on three to five annual goals for the board, the CEO, and each senior team member. |
| 11 | Communicating Our Results (4 Creative Options) | Use your creativity here! Ask other organizations how they communicate results (per Drucker Question #4). Ideas:   * Create an “Our Results” page on your website—and update it frequently with success stories of how your plan is fostering results. * Publish an annual booklet of 20-30 pages of testimonial “results” from your clients, customers, or donors. * Create a video with stories of “results.” * Appoint a “Results Team” to scour the landscape for poignant stories of ministry results—and then how best to share them with others. |

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| **TAB** | **Strategic Plan Teams and Tasks** | **These tasks are generally completed in this chronological order—each task builds upon the previous team’s work.** |
| 12 | Appendix | Assign one person to the “Appendix Team” and require all teams to submit both final and early drafts of their work. In a “rolling” strategic plan process—the Appendix will be referenced year-round, year-after-year. |
| 1 | Introduction | Appoint your best writers and wordsmithers to write the introduction—once the plan is complete. Key word: brevity! |
| 2 | Organization-at-a-Glance & Historical Snapshot | Visit organizational websites to catch the flavor of how to format this “organization-at-a-glance” picture. What would a new donor, a new staff member, or a new board member find helpful? Use graphics, timelines, and photos. |
| 3A | Executive Summary | Read executive summaries from other strategic plans. You may need several versions of the executive summary— based on who will be reading it. (Foundations? Major donors? Staff? Volunteers?) |
| 3B | The Rolling 3-Year Strategic Plan Placemat | Reminder! This one-page, 11” x 17” document is the summary of all your hard work. Don’t skimp on graphics, color, or paper quality—but keep it simple. And…proofread! |
|  | **SUPPLEMENTARY RESOURCES** | |
| 13 | Customized Strategic Plan Versions (Board, Staff, Volunteers, Donors, etc.) | Consider whether your “in-house” version of the strategic plan report will be relevant to other segments. If not, create appropriate versions for other audiences. |
| 14 | ***HOOPLA!*** Celebration | Read Chapter 10, “The Hoopla! Bucket” in *Mastering the Management Buckets*—and plan a celebration when the strategic plan is completed and approved by the board.[[3]](#footnote-3) |
| 15 | Update of Annual Planning Calendar | This might be the most important task. Before your plan is complete, you must identify the key deadlines for the next 12 months for keeping your rolling plan—rolling! Most senior teams prefer a quarterly off-site day to review progress on the current year and then add one more year to the rolling three-year plan. (Patrick Lencioni recommends four meeting types, including the quarterly off-site meeting.)[[4]](#footnote-4) |

1. Adapted from John Pearson’s three-day workshop, “The Rolling 3-Year Strategic Plan Workshop: Build It. Execute It. Update It. Year After Year!” [*http://managementbuckets.com/workshops*.](http://managementbuckets.com/workshops) [↑](#footnote-ref-1)
2. Read Chapter 10, “The Hoopla! Bucket” in John Pearson, *Mastering the Management Buckets: 20 Critical Competencies for Leading Your Business or Nonprofit* (Ventura, CA: Regal , 2008). [↑](#footnote-ref-2)
3. Pearson, *Mastering the Management Buckets*, 143–55. [↑](#footnote-ref-3)
4. Patrick Lencioni, *Death by Meeting: A Leadership Fable . . . About Solving the Most Painful Problem in Business* (San Francisco: Jossey-Bass, 2004), 249. [↑](#footnote-ref-4)