

Strategic Planning and Coalition Work

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In a field that is driven by crisis, taking time to build our organizations mindfully can feel like a luxury. Coalitions, though not direct-service organizations typically, often function in the same culture of crisis that our member programs do. We are terrifically busy responding to the needs of our membership, creating and supporting policy changes, supporting growing numbers of staff members, and crafting technical assistance materials – all in alignment with our grant and contract requirements. Too often, we say with a sigh, “who has time to plan?”

The stark reality is that for all organizations, with no exception, investing time and energy in a meaningful planning or visioning process will pay off tremendously in terms of the future health of the organization. Finding the time, resources, and energy to plan is critical to the long-term health, sustainability, and stability of all organizations. Planning processes vary widely, and every organization can take a different approach; some organizations may prefer a detailed strategic planning process, while others may benefit more from a global vision process without specific action steps outlined. This article includes details about steps that are involved in a traditional planning process – a broader visioning process, though also appropriate, would look much different.

Coalitions have their own unique challenges and strengths in any planning process. On the whole, coalitions in the Anti-Rape Movement have two foundational purposes: one purpose is to serve a membership made up of rape crisis centers and other members who are committed to eliminating sexual violence; the other purpose is to support and create change in the systems across the state that can or should serve victims.

Coalitions are made up of member centers, and in most cases are governed at least in part by these members. That means that those you serve and represent will help make decisions about where the organization is heading in the future, and what the organization’s priority areas should be. This foundation is both a strength and a challenge; it is imperative that our memberships guide our growth, but they may not always be in a position to see and know what important next steps might be for an organization that also works on a playing field that includes many statewide government agencies and advocacy groups.

In order to highlight priorities at the statewide, systems-advocacy level, other groups or individuals will need to participate as well. Though it may be difficult, if not impossible, for coalitions to outline several years’ worth of systems priorities, it may be possible for coalitions to identify major areas on which to focus. At a minimum, your coalition’s strategic plan can establish systems work as a priority itself.

Why vision and plan?

A visioning or planning process can open your organization up to a myriad of possibilities. Taking the opportunity to sit back and dream about the potential ways an organization can grow can be recharging, reinigorating, and can launch the organization into a powerful future.

Additionally, an organization with a strategic plan is like a ship with an anchor in a storm. Organizations are often at the mercy of trends in the field, new funding opportunities, and the preferences of individuals in leadership positions. A plan helps keep the organization mission and constituent focused, ensures that the goals and vision of the organization are clearly stated and (hopefully) understood by people at all levels of the organization, and can keep the organization from being swung around capriciously by new opportunities. New opportunities can always be taken or capitalized upon, of course, but the plan can help ensure that any new projects or funding fit the path the organization intends to follow.

What is a strategic plan?

A strategic plan, in its most general terms, is a document created through a comprehensive agency-wide process to determine the vision and goals for the organization's future. It should include action steps and a timeline, and should designate who is responsible for carrying out each step of the plan, in order to guide the organization in its next phase of growth or change.

A strategic plan can be and include a lot of different things, depending on where the organization is in its life cycle. Is it a new, nimble organization? Or is it long-standing and more bureaucratic? Is it in crisis or in a period of calm? Is it growing or consolidating? Answering these questions in the initial phase of your planning process will help shape the nuts and bolts of your organization's specific plan.

The major focus areas of any plan can cover any number of things, including, but not limited to:

- the mission,
- program development,
- internal structure,
- funding growth,
- staff development,
- board development,
- membership recruitment, and
- systems change priorities.

Getting Started

For any coalition that is not currently operating with a strategic plan, a good first step to take on the path to creating one is to engage the board of directors. Every board is different and has its own personality. In some cases it might be simplest to begin by talking to the Executive Committee or Board Chair. The board is ultimately responsible for the mission and vision. Here are some reasons board members should be involved in the process:

- Boards can better govern if they understand the ins and outs of the plan

- Board members have broader viewpoint (outside of daily operations) to offer into the process
- Board members must be able to communicate agency's vision to the public
- Board perspectives add diversity to the process
- Boards must set budgets and priorities for agency, which goes hand-in-hand with planning.

If you're working to get board members ready to plan, it might be useful to point out that their job of governing the agency will be much easier to accomplish with a plan, and that participating in a planning process gives each board member a solid opportunity to help set the course for their coalition's development.

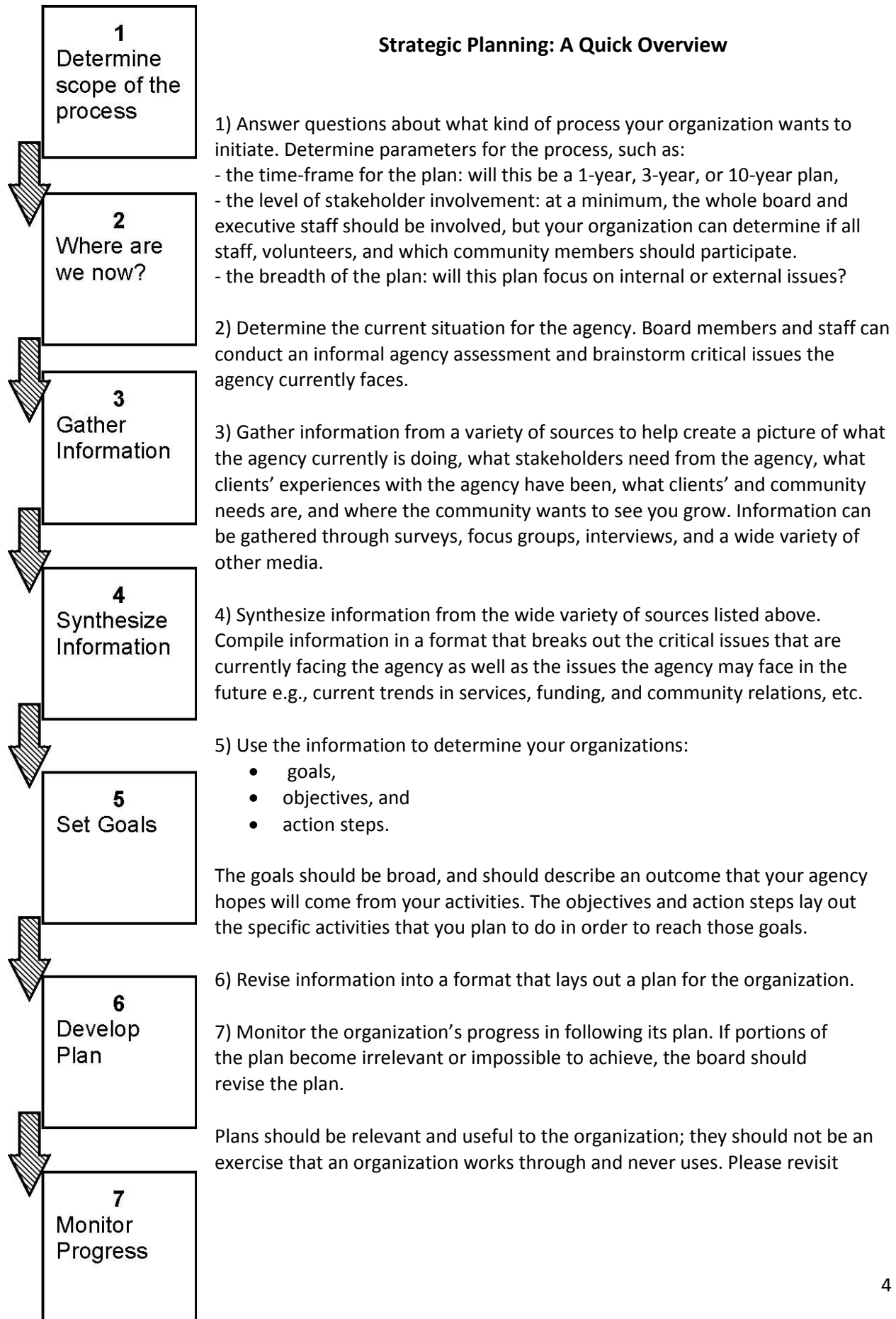
Folks can be resistant to planning because they:

- Fear losing control,
- Don't have the time or energy to invest in the process,
- Don't know how to start, or
- Worry about potential change.

Working with your board to address any concerns they have is critical. If you believe you will have resistance, consider working with your board chair or executive committee first. If there is not enough commitment to engaging in a thorough planning process, you may need to try again next year.

Once the board is ready to begin, it's important to involve staff in the beginning stages of creating the process, since they will undoubtedly be affected by the planning process and outcome.

Strategic Planning: A Quick Overview



your plan frequently in order to make decisions for your agency.

Scope of the Process

Once the board has decided it's time to plan, it's a good idea to hone in what you expect the scope of the process to be. Depending on what your organization is like, the scope of your planning process could range from creating a one-year crisis-management plan to a 5 or even 10-year strategic growth plan. Before beginning the process, it's a good idea to share a common sense of how much your organization is trying to accomplish during this time.

Once everyone's ready to go, it's good to identify:

- the time-frame for the plan: will this be a 1-year, 3-year, or 10-year plan?
- the level of stakeholder involvement: at a minimum, the whole board and executive staff should be involved, but your organization can determine if all staff, volunteers, and which community members should participate.
- the breadth of the plan: will this plan focus on internal or external issues?

In order to get answers to these initial questions, the board and staff could fill out quick surveys about their expectations of a planning process, they could have a discussion about the organization's readiness to look at short and long-term issues, or they could ask a consultant to come in and help them decide which way to go.

A word about hiring a consultant

Many organizations choose to hire a consultant to facilitate the planning process. Hiring a consultant can be a good idea in order to ensure that all voices are heard, that everyone is free to participate in the process (as opposed to being responsible for convening it, and that the process keeps moving.

Consultants can also be drivers in your process in a way that might be difficult for the organization. Be very wary of hiring consultants who have a personal stake in the development of the coalition, as they could be inclined to push its development in a way that benefits them directly.

Hiring a consultant can be expensive, but if financing is a problem you might be able to find someone on a volunteer basis. There are often consultants who are either retired or new enough to the work who might be available to help your group.

In any case, any consultant should be informed about the unique needs of a coalition. Coalitions are complex organizations with multi-layered constituencies. Please inform your consultant about the breadth of your membership, statewide colleagues, board of directors, and staff. A consultant may be unsure how to build in your focus on systems advocacy as it's difficult to assess those needs. Please talk to your consultant in advance about the requirements and priorities your organization has developed around systems work and be sure to build in space for that work in your final plan.

If you cannot hire a consultant, please designate either one person or a small committee of folks to engineer the process and keep it rolling.

After the board and staff have had some time to think through the parameters of the planning process, it's useful to delegate the rest of the coordination to a planning committee. This committee can be made up of board members and staff and can help either be a contact for a facilitator to help in setting up the process or they can be the group that primarily designs the process. This group's role is to serve as representatives of the board and staff in the establishment of a process that will work well for everyone.

The board and staff, though both involved in the planning process, have different roles and responsibilities for the organization. Everyone should be mindful of their different roles and responsibilities: the board is responsible for the vision, goal-setting, and overall governance of the agency while the staff is responsible for carrying out the programs and projects that align with those goals. Staff should be involved in the planning process because they likely have more information about issues that the coalition is facing and they have a stake in the outcome of the process.

Identifying Stakeholders

Figuring out whom to involve in the planning process is an important step to take after the scope has been determined. It is often useful to have a full planning committee brainstorm to identify everyone who has a stake in the coalition's growth, development, and work. A coalition's list of stakeholders might include all parts of the membership, individuals and organizations that receive or could potentially receive the coalition's service, survivors, and other allied groups.

After brainstorming a list of stakeholders, the planning committee can determine how deeply to involve any of them in your process. The amount of participation in the process can range from being surveyed, to being a part of a focus group, to being a member of the planning committee.

Where are we now?

Before any organization can decide collectively where to go and how to move forward, the board and staff need to be clear on where they are now. To get a sense of the current reality of an organization, the group can work together to list out:

- What are the current trends in the field (what is happening nationally in sexual violence work)?
- What is the current funding picture for the organization?
- What are programmatic trends?
- What's working well?
- What's a challenge for the organization?
- What issues do staff see that are critical for the organization?
- What does the board see that's critical?

If the group themselves cannot answer these questions, think about other experts or constituents that you can ask.

Outside of the planning group identifying the answers to these questions in a vacuum, the group can hold focus groups, survey staff, board, and membership, and pull together research about the current state of the coalition.

Gather information to guide goal setting

Once you've identified the current reality of the coalition, it's time to move forward and think about the potential vision and goals for the organization in the future. This phase of the planning process is particularly exciting as it challenges those involved with the organization to think through all of the possible things the coalition could grow into for the future.

Gather information from a variety of sources to help create a picture of what the agency currently is doing, what stakeholders need from the agency, what clients' experiences with the agency have been, what clients' and community needs are, and where the community wants to

see you grow. Information can be gathered through surveys, focus groups, interviews, and a wide variety of other media.

Synthesize information

Take time to organize the vast amounts of information you've received. Are there trends or similarities in the feedback? Does some of the feedback you've received conflict with other feedback?

It's good to spend some quality time organizing all of the data collected from these previous steps. Make lists of all the categories of information you've collected and share them with the group.

Set Goals

Now that the group has reviewed the data collected in the earlier steps, it's time for the group to discuss what they see and to set goals for the agency's future.

It's good to start by examining the data as a group. The group needs to look at the trends and key issue that surface in the data. Key issues will pop out as either:

- Issues that if left untended to will create a crisis
- Opportunities that the group feels cannot be missed
- Strong recommendations from one or more sources that point the organization in the same direction.

The group can determine which trends, issues, ideas they want to address in the formation of the plan. It's good for the group to figure out what kind of decision making process they want to use to make these selections: do they want to use some kind of voting process (such as dot-voting) or do they want to reach consensus?

Once the group decides how to make these selections, they can move forward to identify the priority issues and turn the issues into goals for the agency to pursue. It's important that the organization select a number of goals that would be appropriate for an agency its own size; a large organization may have a comprehensive plan with 10 major goals while a smaller agency may choose to focus its energy on three or four attainable goals.

Key Definitions

What is a **goal**?

A goal is an end-point towards which the organization directs its energy. For example, an organization operates with a goal of eliminating sexual violence.

What is an **objective**?

An objective is a short-term goal that's attainable by the organization if it takes a specific set of action steps.

What is an **action step**?

An action step is a concrete task that can be completed on the way to accomplishing a short or long term goal.

Develop Plan

Once the group has selected its goals, there are several ways to proceed in developing the concrete objectives and action steps underneath each goal. It's very important to spend quality time building in the details behind accomplishing each goal or else there won't be shared agreement across the agency about how these goals will be accomplished.

One way to move from goals to concrete objectives and activities is to print each goal on the top of a piece of flipchart paper. The big planning group can break into smaller groups, with each group focusing on one goal. If each small group spends an hour or two mapping out the steps to accomplishing each goal, the group can put all of these pieces together through the course of a facilitated discussion in the hopes of formulating a comprehensive agency-wide plan.

It is very important that each action step, task, and objective be attached to a timeline and a person and/or committee who is responsible for its pursuit.

There are many ways to determine what steps need to be taken to help the agency reach its goals. The important thing is that there be a way for each goal to be examined in isolation first so it can be focused on and then all of the goals and action steps need to be examined together to ensure that they:

- Make sense together and don't conflict,
- Are realistic,
- Establish reasonable timelines,
- Are all in line with the organization's mission statement, and
- Share responsibility across the agency in accordance with everyone's roles.

Monitor Progress

Now that the organization has a plan, the organization needs to make sure they take steps to pursue it and also evaluate to see if the goals and action steps continue to meet its needs. An organization's board and staff should both work to follow and revisit the plan frequently; the goals of the plan should guide the organization's development in every way.

With that said, however, a plan should not feel like a rigid document to which the organization should always adhere. It is intended to be a road map to help the organization get to its next major step. If that step is no longer the one that is right for the organization the plan needs to be adapted to meet the organization's new current reality.