



Strategic Visioning

by Christi Hurt

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, 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 and dream 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.

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 and/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, reinvigorating, 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 constituency 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, philosophy, and/or organization's values;
- program development;
- internal structure;
- funding growth;
- staff development;
- board development;
- membership development; and
- systems change priorities.

An organization's plan does not necessarily need to cover all of these areas, though a broad-based plan may at least touch on all of them in some capacity.

Visioning

Coalitions engage in a variety of different processes to set their long and short-term goals. These processes vary as much as the personalities of the coalitions do; they can be comprehensive, narrow, vague, precise, and can help or hinder coalitions as they move forward.

Because the nature of coalition work is complicated, coalitions often struggle to develop detailed plans with concrete action steps that guide their work for years to come. Coalitions are responsible for supporting diverse membership agencies in their local work while advocating within state-level systems for policy improvements. As such, coalitions' activities shift frequently in response to the demand for their services and as a result of funding changes. From year to year, coalition work within one state may not look the same.

As a result, typical strategic planning processes - wherein coalitions analyze and make decisions about future goals and activities for the organization - may not meet the need for these dynamic organizations. Whereas coalitions may need to remain nimble and flexible to meet the ever-changing needs of their memberships, strategic plans may restrict organizations to a specific set of goals that were deemed necessary at a particular point in time. These goals may no longer be applicable as the cultural, political, and economic environment changes.

Instead of focusing on a detailed strategic plan, coalitions can engage in a broad strategic visioning process, wherein they:

- identify organizational values,
- evaluate current mission,
- identify trends in the field (statewide, national, local),
- hear needs of membership and other stakeholders, and
- identify and select broad goals to pursue for the next 3 years.

The intention in developing values, mission clarity, and a strategic vision is to provide all levels of the organization with a guidepost against which the board and staff can measure potential future endeavors. If the organization is clear on its values, mission, and broad goals, leadership can evaluate opportunities against those guideposts to see if the opportunity fits the overarching framework for where the organization is trying to go. If it meets the values, mission, vision test, then organizational leadership can facilitate the staff pursuing that opportunity.

As an additional benefit, this visioning work can also serve to energize partners and members toward common goals. It engages stakeholders in a meaningful way and facilitates partners' ability to work towards the goals and vision.

A visioning process can be just as intensive as a broader planning process, and the difference between planning and visioning could be negligible. Depending on the needs of the organization and the engagement of its constituency, there can be fluidity in the process.

Getting Started

For any coalition that is not currently operating with a strategic or other type of plan, a good first step to take on the path to creating one is to engage the Board of Directors in a discussion about the long-term growth and sustainability of the organization. Every Board is different and has its own personality, and that personality will drive how to open up that conversation most effectively.

In some cases it might be simplest to begin by having the Executive Director engage in a discussion with the Executive Committee or Board Chair. Because the Board is ultimately responsible for setting the mission, vision, and goals of the coalition, the planning process must be embraced by the whole Board. Here are some reasons Board Members should be involved in the process:

- Boards are responsible for setting the mission, vision, and goals of the agency.
- Boards can better govern if they understand where the organization is going.
- 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 step back and address smaller planning initiatives (perhaps programmatic planning only) until the Board is ready to take on the broader scope of planning.

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.

Coalitions might consider creating a planning subcommittee, or planning group, that manages the details of the planning process efficiently and effectively. This group should include staff and Board Members.

Determine the scope of the process

More than anything, a plan needs to be useful to the people in the organization it represents. There is no 'one-size-fits-all' version of planning that addresses every agency. Instead, coalitions must determine:

- Who needs to be involved at some level with the planning process? (membership, constituents, allies, staff, Board members, etc.)
- Do you need/want a facilitator to help with the process? (a facilitator can be useful to help keep the process moving and help think creatively when the process might feel 'stuck.')
- What timeframe the plan will address? One year? Three years? Five years?
- Will the plan be a short-term, operations-focused plan? Or will it be a long-term, visioning plan?
- How much detail do you need? Is the coalition in a predictable enough position that developing a series of concrete action steps makes sense? Or does there need to be more flexibility to adapt to potential organizational or environmental changes?
- What areas of the coalition do you want to make sure to address in the context of planning? (program areas, governance topics, fund development, staff recruitment, etc).

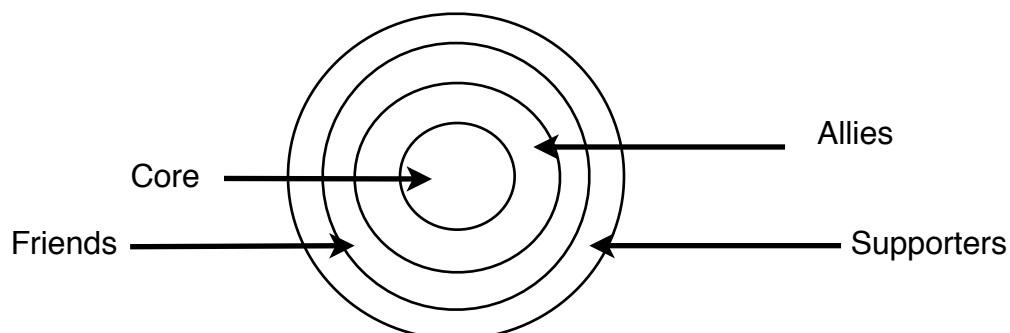
Identify Stakeholders

Coalitions are by nature stakeholder-driven organizations. They are driven by the needs of their member centers, but are also in the position of helping those member programs develop and prepare for the future. As such, there is a give-and-take relationship between coalitions and their memberships that can be difficult to manage as needs and interests change over time.

A strategic planning/visioning process is an ideal time to assess the needs and interests of a coalition's membership. The entire coalition membership should be included in the planning process, but the extent of participation can vary widely.

Before beginning to collect information, coalitions should determine which stakeholders to include in the process. Identifying stakeholders and determining how much to involve each group are important tasks. Though this process should be started before any data is collected or planning is completed, the stakeholder list can be adapted and refined throughout the process.

Identifying stakeholders can include a series of brainstorming sessions or informal conversations during which anyone who is affected by the coalition is listed as someone who could be interested or invested in the planning process. It might be helpful to consider the organization as having several different types of stakeholders:



Once stakeholders are identified, the planning group can start sorting them into broad categories according to the above spheres or through another sub-grouping system. Dividing the stakeholders into different groups will help the planning group determine how much information and input will flow between the coalition and the group (e.g. it is not necessary to keep a distant supporting organization in the loop in the same way the coalition might keep its membership informed about the process).

Collect Information

One of the great benefits of initiating a planning process is creating the opportunity for the coalition to take stock of where it is in its development, what trends will impact it in the future, and where its greatest strengths lie. There are a variety of ways organizations can collect information to help answer these questions (such as environmental scanning or SWOT analyses), but the crux of this important step is that organizations must ask key questions of its stakeholders and other individuals/agencies in-the-know about nonprofits or sexual violence to help determine, at a minimum:

- strengths and challenges of the coalitions programs/operations,
- strengths and challenges of member agencies,
- trends in the community,
- trends that impact sexual violence and service provision,
- trends or factors that influence nonprofit or association operations,
- needs or gaps in the community that affect the coalition, and
- potential partnerships.

These key questions can be asked in a variety of formats, from a simple survey to a series of focus groups. While some stakeholders (core, allies) might participate in a more intensive interview or focus group process, other stakeholders (supporters, friends) might just have a chance to give input through the survey. In any case, the coalition can choose to use whatever method suits its operations, budget, and timeline the best.

Synthesize Data

Once data has been collected, it's time to synthesize it and identify themes. Depending on what types of data collected, there may be narrative stories that surround a few themes or there may be survey data that stacks up in a few different topic areas. In either case, it's important to find a way to compile all of the information received and share that information back with the planning committee and larger planning group.

There may be themes that the coalition can easily address in its planning/visioning process and there may be others that seem irrelevant to the coalition: that's OK. The data collected is input into the planning process; it is not a vote about how the coalition should focus its activities.

Coalesce Vision and Goals

At this point, it's useful for the coalition to arrange for a facilitated discussion amongst the planning group and at least a part of the core stakeholder group to determine how the data collected will impact the vision and goals for the coalition. Those in the core sphere of the coalition's operations must evaluate the compiled trends, challenges, gaps, partnerships and such and determine what the organization should focus on for its future. Because coalitions are complicated organizations, it can be very difficult to pin down a set list of priorities and action steps. Instead, coalitions can focus on developing some big picture ideas and goals.

Once the stakeholder data collection process is complete, coalition staff and Board Members should read and reflect on the information they've received and then ask themselves a series of key questions:

- What was surprising about this information? What wasn't surprising?

- What resonated with other information or data we have internally?
- What data/trends are clearly outside the boundaries of what the coalition can focus on?
- What data/trends are within the coalition's boundaries and require a new or renewed focus?
- What is not on these lists that should be?
- Are there new partnerships we can support?
- What does the coalition want to work on but doesn't have the resources to support right now?
- Are there pieces of data that dramatically affect who the coalition is and what it should become in the future?
- What did the coalition hear that will (potentially) most dramatically affect its future?

After these questions have been discussed (with or without any consensus on priorities) the group should take stock of how this information can affect the vision of the coalition. In short, after hearing from the stakeholders, the coalition should try to answer the question:

What are we trying to create in the world?

The vision should address the future reality the coalition is trying to create. It should be optimistic, hopeful, and inspirational. If the coalition has a vision or vision statement that makes sense, it will more clearly be able to prioritize goals that are in line with that vision.

Similarly, the coalition should take some time to revisit its existing mission statement to ensure that it is still current, applicable, and a reflection of the purpose of the coalition. The planning group (and perhaps the membership of the coalition, depending on who is responsible for setting the mission, as designated in the organization's by-laws) should review the current mission to see if it needs any changes. The mission is different from the vision statement in that it expresses **what** the organization does to achieve its vision.

What do we do to achieve our mission?

Keep in mind that the organization's current mission and/or vision may be completely relevant and applicable. If that is the case, there is no need to change them. If they are not in tune with the coalition's current goals, priorities, and vision, then they need to be changed by those deemed responsible (the Board of Directors and/or membership, likely).

Once the mission and vision have been revisited and/or revised, the planning group can begin to line up the organization's priorities and goals underneath the mission and vision. Every goal should be related to pursuing the mission and vision of the coalition. There are a variety of methods for voting or developing group consensus on what the priorities and goals for the organization can be; a facilitator may be very helpful to this part of the process.

At this point, the planning group can determine how broad or narrowly to express goals and action steps. The planning group may choose to keep the process broad and may focus only on honing in a vision and some big picture goals. Sticking with the big picture can be very useful for a coalition that wants to make sure it has some sense of what it is trying to accomplish in a given timeframe, but that doesn't want to overly prescribe action steps and timelines in an environment that is ever changing.

On the other hand, some coalitions may choose to develop concrete action steps and timelines to support the implementation of the plan. These plans are more strategic than visioning, as they provide the coalition with a strategy for implementing goals and priorities. This option may be useful for coalitions who have a series of goals that must be accomplished in a certain timeframe - and developing action steps (complete with timelines and persons responsible)

will help provide an outline of how the work will get done.

After goals and priorities are established, the planning committee or group may choose to produce a draft of the planning/visioning document for review by relevant stakeholders. Stakeholders may provide useful input and feedback to the plan, especially if it is supposed to reflect the data they provided early in the planning process.

Evaluate/Revise

A visioning, planning, or goal-setting process does not ever really end. Because coalitions receive new information each day about what sexual assault survivors, rape crisis centers, partners, or other constituents need - visions, plans, and goals are always evolving. It's important to continuously evaluate the relevancy of the plan and adapt it as is needed.

Final Word about Visioning/Planning

There is a lot of scholarship on planning and visioning, and between all the resources available, there is much debate about what makes the most sense for organizations. There is even disagreement on whether planning is useful or a hindrance to organizations' potential flexibility.

Because there are so many options, it's most important for an organization to engage in a process that best suits its needs. A useful process should help strengthen an organization's relationships with its constituents and should provide staff and volunteers with as much direction as is necessary to pursuing the organization's mission and vision.

There is no one size fits all approach to planning or visioning. In order for coalitions to take the time to take stock of trends and issue facing their constituencies, and to make decisions about how to approach complex issues before it's too late - it's often most useful to engage in an assessment and planning/visioning process.

