

Planning for Those Too Busy to Plan

By Heather Berthoud & Bob Greene

The computer system is down, a senior staff person just gave notice, you need to write a speech for this week's fundraising dinner, and the board wants you to take on a brand-new project. With all this on your plate, how can you meet your responsibility as a leader to bridge the here-and-now, daily details and the future success of the organization?

As you put out fires, planning can feel like a luxury. But being too busy to plan is like running alongside your bicycle because you're too busy to get on. We suggest reframing the situation from "I don't have time to plan" to "these constant crises makes planning the top priority."

As consultants, we often hear: "we tried planning before, and it didn't help." Unfortunately planning is often confused with wishful thinking, lofty mission statements, and long to-do lists disconnected from environmental trends or organizational resources. Instead, planning should identify strategic responses to a changing environment and establish doable, measurable action steps.

Consider one source of crises: fund raising. Many nonprofits are stuck in a vicious cycle raising funds from one event to another. Fund raising is often characterized by random good ideas ("I know, let's have an auction!") and responses to unexpected requests for proposals that are due next week. Strategic planning, because it clarifies where the organization is going, can undergird comprehensive fund raising that secures long-term commitments and significant grants and donations.

Without effective planning, organizational endeavors are haphazard activities rather than coordinated, strategically directed programs. For example, publicity and media work may depend on luck rather than a proactive effort to inform the world of the organization. Membership development can consist of sporadic recruitment campaigns that don't necessarily retain members long-term. Individuals and departments may believe they are too busy to collaborate and build synergy. Publicity, membership development, team building, and other organizational work best move an organization forward if they are driven by a comprehensive strategic vision of where the organization is going and how it will get there.

Getting on the Bicycle

Given constant deadlines, how do you stop running beside the bicycle and start steering? A common response is,

"better time management." For time management to be effective, however, it must be based on a solid foundation of planning. As Diagram 1 illustrates, time management depends on setting priorities derived from strategic and operational plans that are grounded by organizational vision and values. Finding better ways to check-off to-do items still begs the questions, "are these to-do items truly important?" and, "where are these activities leading us?"

Planning is about establishing priorities. Ideally, long-term priorities inform the me-

medium- and short-term. But sometimes you need to get out of the immediate whirlwind before you can think long-term. Here are a variety of recommendations, starting with short-term time-management ideas and moving to longer-range planning suggestions.

Suggestions for the short-term:

1. Time-management techniques may be valuable immediately and help buy the necessary time for more comprehensive planning. The first step is to separate the *important* from the *urgent*. Steven Covey, in *The Seven Habits of Highly Effective People*, explains that what is urgent—an immanent deadline—may not necessarily be important—what is in the long-run best interest of the organization (such as developing a comprehensive fund raising plan or researching the need for a new program). Make a list of all of the tasks, large and small, that are keeping you so busy. Now mark each as being either urgent, important, or urgent and important. (Go ahead and cross out now those tasks that are neither urgent nor important.) The next challenge is to reduce the number of urgent tasks to concentrate more on what's most important.

2. Making time for what is most important is a leadership team effort. Work together with the board president and/or senior staff to make sure that

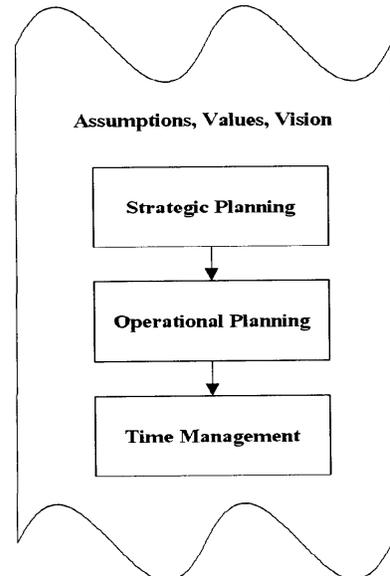


Diagram 1

everyone's immediate-term efforts are prioritized appropriately.

3. As part of the leadership team discussions, compare priorities versus resources. Do you have the human, financial, and material resources to realistically accomplish your priorities? If getting through each day depends on superhuman efforts (the nonprofit "Superhero Syndrome") then your organization is in a danger-zone. An organization strung out nearly to the breaking point will be hard-pressed to innovate and will likely face high turnover and poor staff morale. The leadership team may need to conduct "emergency room triage" by putting some activities on hold and directing everyone's limited energies to one or more critical projects.

4. Starting today, take 15 minutes to reflect on what you've learned and to celebrate what you've accomplished in the last twenty-four hours. Do this every single day, and increase the amount of time spent reflecting and celebrating. When you are caught up in a blizzard of activity, it is easy to forget to reflect and learn from your experiences and show appreciation to all those superheroes.

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Suggestions for the medium-term:

1. Move from reflecting on one day at a time to reflecting on the last week, month, or quarter. Based on the determination of what your human and material resources can realistically accomplish, identify the efforts that will be most beneficial for the organization to focus on during the next 6–12 months.

2. Then create an operational plan to implement the agreed-to priorities. Identify and chart the activities, resources needed, responsible individuals, budget, timelines, etc. Everyone's daily to-do lists should clearly flow from the operational plan.

3. Bring staff from various functions and departments together to discuss how they can coordinate implementation of the operational plan. If staff complain they don't have time to collaborate, *make that the main topic of discussion*—this will raise many issues that are blocking success!

Suggestions for the longer term:

1. Engage in strategic planning when you and your team effectively implement programs but wonder what all the programs amount to—the organization's future direction may be called into question because of falling membership, demographic or other community changes,

increased competition from other organizations, or just the nagging feeling that you are stuck in a rut.

There are numerous models and approaches to planning; the process should be tailored to a particular organization's needs. Key elements of an effective strategic planning process include:

- Clarifying organizational assumptions, values, vision, and beliefs that undergird the organization's work.
- Gathering objective, high quality data from a wide range of the organization's stakeholders. (In contrast, organizational decisions are often based on gut impressions, speculation, or the suggestions of a vocal few.)
- Using the data gathered to analyze internal strengths and weaknesses and external threats and opportunities affecting the organization.
- Developing goals and options for achieving them.

2. Once you have a strategic plan, use it to make programmatic decisions and assess progress through periodic board review. Ensure that operational plans are based on the strategic plan, and daily to-do lists flow from the operational plan. The strategic plan, therefore, is a tool to help align everyone's efforts.

3. On an annual basis review the strategic plan itself and, especially, the underlying assumptions. Test whether what you assumed would happen actually occurred and consider whether the plan needs to be adjusted.

Conclusion

If you are too busy to engage in planning now, short- and medium-term fixes may be necessary. Recognize, though, that sometimes the *busy-ness* is a result of taking on too many disconnected tasks because "they seem like good ideas" and not because they are driven by a plan for the future.

Our experience shows that those organizations that grow and serve their communities long-term operate with a clear vision connected to daily realities. This does not involve pie-in-the-sky dreaming. It requires focusing efforts in a proactive and strategic manner—getting on the bike and steering, rather than trying to run alongside it.

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