

# e-musing

April 2008

## Organic Planning

Constantly thin organizational margins and the rapid pace of change make it uncommon that organizational leaders are always successful as “the visionary.” Therefore, planning efforts that set out to craft a big, bold, compelling statement of what an organization will be in 5 or 10 years is all too often inadequate. Vision is still very important; it has just been overemphasized to the detriment of an equally important impulse to build ongoing agility and adaptability into the organization.<sup>1</sup> Nonprofit organizations must control the desire for drama that is often driven by the five-year episodic nature of planning and the assumption that what donors expect is some bold new peak to climb. Just as often, donors are telling us that they want demonstrated results, a tangible delivery on our promises, and societal impact.

Nonprofit planning teams face similar pressures: (1) service needs are increasing, (2) resources are often constrained, (3) reliable/renewable income streams are challenged, (4) local and global fundraising competition is increasing at significant rates, (5) the organization struggles for public visibility, (6) the pace of change in the industry/business and/or the marketplace is increasing at destabilizing rates, and (7) leaders sense a growing feeling of not being able to stay on top of it all.

There are, perhaps, as many ways to approach planning as there are organizations and leaders. What works for some may not work for others. Yet how a leader plans is how that leader leads. The planning process can be one that is episodic and parallel to the ongoing work of the organization. On the other hand, it can be ongoing and closely intertwined with the life of the organization.

Some time ago, a client—Tom Soma, executive director of Ronald McDonald House Charities of Oregon and SW Washington (RMHC)—and I found ourselves on a long drive to the annual board retreat. Having worked together through two strategic planning processes, several board retreats, and episodic thinking and coaching sessions over the years, we began pondering why RMHC had become so good at planning. Perhaps influenced by the farmland rolling past our windows, we concluded that RMHC had evolved

<sup>1</sup> See Light, P. C., (2005). *The four pillars of high performance: How robust organizations achieve extraordinary results*. New York: McGraw Hill.

e-musing...is an episodic thought burst intended to seed ideas and to stimulate discussion among organizational leaders.

to an “organic”<sup>2</sup> way of approaching planning; a way that both enriches the planning process as well as the day-to-day operation of the organization.

We concluded that organic planning is as much a mindset and a learned set of behaviors as it is a planning “model.” It creates a style of communication and a style of constituent engagement that subsequently enables faster organizational transitions and provides the speed and flexibility for any other type of planning (e.g., crisis, operational, or scenario).

We began to speculate on organizational attributes and experiences that fuel the evolution to a more organic planning style. The following is a starting point for your consideration:

1. The organization is very clear about its mission and the constituency served.
2. Leaders agree they have had successful planning experiences to draw from.
3. There is leadership consistency/continuity and symmetry (e.g., the relationship between the staff leader and the board leader).
4. The organization is financially stable.
5. Most importantly, the CEO and board leaders place high value on planning as a discipline, demonstrated by a willingness to invest and commit the necessary resources.

We observe there are several fundamental elements of organic planning. First is an organizational culture of trust, modeled by the CEO and board. Second, there has to be an air of organizational confidence—being open to a new range of opportunities. Third is a continuous commitment to listen to the marketplace (a.k.a. customer, client, donor, program participant, alumnus). Closely aligned, and fourth on our list, is being attentive to the environment for signals of change and movement. Fifth is seeing that the right combination of human resources is assembled and appropriately resourced to do their jobs. Sixth is monitoring and reporting on organizational effectiveness and impact.

Finally, evolving to adapt some sort of organic planning posture necessitates reconsideration of board governance. Inherent in this mindset and behavioral shift is the need for the executive committee (or some central authority) to embrace its role to raise questions about the future, to help the CEO make sense of often conflicting observations, and—most importantly—to align strategy and resources with organizational values.

The comments above deserve much more exploration and discussion of the practical application. We are currently researching this topic for further discourse at much more depth. Your comments and experiences are welcome, and we appreciate your feedback.

###

---

<sup>2</sup> The National Organic Standards Board Definition of “organic.” The following definition of “organic” was passed by the NOSB at its April 1995 meeting in Orlando, Florida: “Organic agriculture is an ecological production management system that promotes and enhances biodiversity, biological cycles and soil biological activity. It is based on minimal use of off-farm inputs and on management practices that restore, maintain and enhance ecological harmony