Planning in a Quickly Changing World:
Arrive at Your Destination Without Getting Stuck in Traffic

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Agenda

• New Planning Trends
• Agreed Vision of Success
  – Core Problem to Solve
  – Key Beliefs
  – Successful Impact
• Criteria for Decision Making
  – Decision Making Criteria
  – Bubble Map Analysis
• Wrap-up and Next Steps
New in Strategic Planning

• “The king is dead. Long live the king.”
• Opportunity to talk about the future
• Balancing execution and flexibility
• Conversation vs. Crafting
• Consider different possibilities
Strategic Planning and….

being flexibility, agile and nimble
to take advantage of opportunities
and changes
Leveraging Opportunities Model

Shared Need

Porous Divisions

Agreed Vision of Success

Leverage Opportunities

Ongoing Monitoring

Continuous Improvement

Criteria for Decision Making
Agreed Vision of Success

- Problem to solve – Five Whys?
- Guiding beliefs
- Desired impact
Benjamin Franklin's 5-Why Analysis:

For want of a nail, a shoe was lost,  
for want of a shoe, a horse was lost,  
for want of a horse, a rider was lost,  
for want of a rider, an army was lost,  
for want of an army, a battle was lost,  
for want of a battle, the war was lost,  
for want of the war, the kingdom was lost,  
and all for the want of a little horseshoe nail.
5-Why Analysis

Define the problem

Why is this happening?

Why is this important?

What difference does it make?

Why should someone care?

Why is that? - Root Cause
Values/Beliefs

What do you believe?
Desired Impact

• What impact does your organization want to have?

• What change would you like to see happen?

• What will success look like?
Criteria for Decision Making

- Criteria Matrix
- Mapping Programs: Bubble Map
## Prioritization & Decision Making Worksheet

<table>
<thead>
<tr>
<th>4 Program* Criteria</th>
<th>Definition</th>
<th>Guiding Questions</th>
<th>Weight x Rating = Score</th>
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| Constituent / Organization Fit | Addresses unmet constituent, client, customer, stakeholder, internal/community need or opportunity. | 1. Does the program address an identified need?  
2. How strong is that need? | 20%                     |
| Strategic Fit       | Alignment with organization’s mission, vision, key goals and strategies. | 1. Does this program align with a strategic key goal/organization mission?  
2. Does the program fit with the organization’s technology platform? | 30%                     |
| Cost / Benefit Value | Financial viability; provides financial benefits in excess of resource requirements. | 1. What are the initial time and cost investments?  
2. What are the on-going operations and technology costs?  
3. How deeply does the initiative impact that need? | 25%                     |
| Implementation Feasibility | Initiative can realistically be expected to meet goals given acknowledged risks, commission and staff capacity, capabilities and timing constraints. | 1. Does the organization possess the competencies required?  
2. Is the operational impact acceptable? How complex is the change?  
3. How much effort is needed for execution/implementation? | 25%                     |

*Program = any effort, strategy, initiative or program

### STEPS:
1. Assign a weight to each criteria (this stays the same for each program)  
2. Rating: For each program, rate each of the 4 criteria areas on a scale of 1-5 (with 1=poor fit; 5=good fit)  
3. Calculate the score for each criterion, and add the 4 scores for your Total Score  
4. Rank your programs based on the scores of each program

| Total Score | RANK |
Bubble Map Step-by-Step Key

A. Impact/Vision Statement

B. Core Service Area

C. Related Activity

D. In the Works…

E. Connector Lines

F. Identify 2-3 Key Areas to Work on

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Next Steps

For more information, contact Leslie Robin
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For a copy of this PowerPoint and Workbook, check cnmsocal.org/501conference in the next few weeks.

Thank you!