

Building Commitment *Into Strategic Plans*

Bring your strategic plan to life, with a participative process that fully involves volunteer leaders.

BY KEN WHITNEY

Associations thrive on enthusiasm and commitment. But commitment doesn't just happen—there is a chemistry to it.

Ask volunteers what keeps them going. They may tell you about a dream they have for the association, how much they enjoy the fellowship it provides, or how its mission is important to them and their profession. They may talk about the good things they are accomplishing and how proud they are to be part of the effort.

However they express their commitment, there is the sense that “the association is a part of me and I am part of it. When I work for the association, I am working for myself.” The chemistry of commitment is an amalgam of shared values, purpose, vision, and involvement in planning and achieving something worthwhile.

When this chemistry is integrated into a participative planning process, the results are more than a strategic plan. The planners become inspired to implement it. Here are the key steps in this planning process.

Step 1. Determine the focus question

The need to plan becomes obvious when volunteers have more questions than answers about the association's mission and how they are going to accomplish it.

For members to commit the time and expense to be involved, they must

HIGHLIGHTS

- MEMBERS NEED to be convinced that the planning effort will address their particular concerns.
- REFLECTING ON the history of an association—its victories, mistakes, and struggles—gives members the courage and confidence necessary to plan for the future.
- PERIODIC DISCUSSION and reflection on an organization's vision helps keep members focused and motivated.

be convinced that the planning effort will address their particular concerns. The first step, then, in focusing the strategic planning process is getting questions on the table and deciding which one represents the essence of mutual concerns.

I develop the focus question by asking each participant to complete the sentence: This strategic planning meeting will be worth the effort if we answer the question: . . . ? They write their statements on five-inch by eight-inch cards and tape them on a wall. Each one is read and clustered with similar statements. The underlying concern of each cluster is named, and then we derive a question that represents all of the values and concerns.

For example, at a planning design conference with a national board, questions included the following:

- How do we survive?
- How do we increase membership?
- What is our mission to our industry?
- How do we reach more people in our industry?
- How do we have more influence on weaker state associations?
- How do we have more influence on weak state chapters?

After several attempts at consensus, the group agreed that the following question tied all their questions together: "How does the [name of national association] empower local entrepreneurs in our industry through strong state associations and national services during the next five years?"

Focus questions that connect best with volunteers' values and concerns include global and local aspects, as well as a fixed time period. When there is agreement, the planning process becomes personal and urgent.

Step 2. Conduct a historical analysis

Confidence comes from knowing who you are and from where you have come.

The past is a treasure house of

victories, foul-ups, struggles, and milestones—each one a potential learning experience and a building block of an organization's identity. The past is also a source of courage. Difficult times are not so intimidating when we are reminded that we've experienced them before.

I asked one planning committee what it was about their association that kept them involved. Committee members began talking about the projects they had worked on and the results they had achieved. Of particular significance was an early legislative effort that galvanized their membership. As each one spoke and others affirmed what was being said, even new members became caught up in the stories.

A helpful exercise is for volunteers to recall events and key happenings, write them on cards, and place them on a time line—representing 5–20 years—mounted on a wall. As members share why these events were important to them and to the organization, even the most dispirited realize a sense of pride and accomplishment in who they are and what they have done.

In noting the patterns and trends that show up in the data, reflecting on how their environment has changed and how they have changed, people develop an appreciation for their situation and the way their history has positioned them for the future. As they reassess their mission statements and reexamine their organization's values, volunteer leaders reaffirm why their association merits their continued investment. A positive story about the past gives people confidence to look toward the future.

Step 3. Reflect on the shared vision

If you are clear about where you want to go, you will find a way to get there.

Hopes and dreams pull us into the future. Without them, we tend to lose focus and enthusiasm for what we do. At a personal level, the

clearer the picture of what we want to become, the more compelling the vision.

The same is true of organizations. When members see their own dreams in their association's vision, you can count on them to get involved. Organizations are discovering that periodic discussion and reflection of their vision helps keep members focused and motivated.

Visions are not what "ought to be," because "shoulds" rarely inspire continued commitment. Lofty ideas spun from imaginative brainstorming don't work either.

Visions that motivate come from the heart. They represent specific aspirations in which members deeply believe. Here are some examples of visions cited by members of various associations:

- industrywide recognition of certification;
- legislative committees relying on members for input in drafting legislation;
- heavy involvement of members—at least 50 percent—in volunteer efforts; and
- establishment of a national training center.

The strategic planning process can get stuck when visions don't come from the heart, as the following example illustrates. A strategic planning committee had become frustrated after six months and asked me for help in bringing the process to closure. The committee had come up with a restatement of goals from the plan of the previous year. All agreed these goals were not exciting to them and surely would not be so to the membership.

I asked each committee member to write down on cards five specific things they personally would like the association to accomplish in three to five years. We put the cards on the wall and arranged those with similar objectives in columns. We then named the common objective of each column and organized them into a chart with the most important

sought-after accomplishments—in-depth professional education and heightened professional recognition—listed in the center and supporting ideas listed on the sides.

The board also chose as an overall theme for the strategic plan “demonstrating the model association in everything we do.” What excited committee members was that everyone’s passion was included, yet a single focus guided them all. When the chart was completed, one person said, “Now that is worth working for.” A theme can serve as a valuable reference point for evaluating whether strategic planning efforts are on target.

Step 4. Identify underlying contradictions

If that’s where we want to be, why aren’t we there already?

When the shared vision of an organization is not being realized, something is blocking it. The question at this point in the process is not, “How do we get to our vision?” but, instead, “What is preventing us from achieving it?”

Contradictions are unquestioned assumptions, mind-sets, and practices that oppose the vision. Consider, for example, a trade association that had formed 10 years earlier to do battle with public sector groups over some legislation. The association’s board, however, realized that the “us versus them” posture was preventing it from working with the same groups that could help it achieve its vision—groups that, in fact, had sought their cooperation. As one board member put it, “We’re still fighting enemies that don’t exist anymore.”

Contradictions are not a “lack of” something. They exist. Naming contradictions is the first step toward eliminating them, as the following examples illustrate.

An industry executives’ board that had been unable to reach agreement on the type of programs to offer noted lower-than-break-even attendance at many of its seminars. In a

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contradictions workshop, board members discovered they were attempting to respond to the impossibly diverse interests of their industry rather than to the professional concerns of executives, which was their original mission and their niche among other industry-related associations. Once board members refocused on their core business, they had a much clearer picture of who they were and what they had to offer.

Wondering why it couldn’t seem to attract more members, another association board realized that its office facilities and publications projected the image of a poor, make-do organization, in which only some members took pride. One board member put it this way: “Our industry is becoming increasingly professional, and we still act like a bunch of farmers.”

While contradictions may be obvious to a consultant, they are rarely acknowledged until the people who are involved with them discover how they participate in keeping them alive. The famous words of Pogo apply here: “We have met the enemy and he is us.”

This is exactly what happened to the board of a private utility association during a planning retreat. For years, the “small,” locally owned companies had maintained an uneasy relationship with the two “big” multistate companies. Attempts to reach agreement on positions to

lobby before state regulatory agencies usually ended in frustration, especially when the positions would benefit one group over another.

I asked why, with a majority on the board, the local companies would not champion their positions. After a few minutes of embarrassed silence, one member said that if they did, the big companies would cut their support, which represented 40 percent of the budget.

When I asked for verification, a big company president grinned and said, “We just like to yank your chain. It’s not in our interest to pull our support. We’re all in this business together. Besides, we have our own lobbyist.”

After a moment of awestruck silence, one of the local company owners said, “I thought we had to knuckle under to these guys. I guess we need to stop calling ourselves the small companies. We act like we believe it.”

An organization’s stress points represent clues to identifying contradictions. I ask boards to list the issues and irritants that are most frustrating and cause them to be cynical or doubtful about achieving their association’s vision. Board members then cluster the issues around similar underlying causes and name the patterns, structures, mind-sets, values, reward systems, and so forth in each cluster that keep those issues alive and well in their organizations. When people pinpoint the obstacles that have frustrated them, pathways to the vision become clear.

Step 5. Name strategic directions

“Forward, march!” may not be the best way to move toward the vision.

There is a difference between long-range planning and strategic planning. Long-range planning projects existing ways of doing business into future years, often setting goals of “more” or “better” relative to current programs. Assumptions about the business environment and

operational practices and strategies remain unchallenged. This is classic linear thinking, which many organizations are abandoning because their environment changes so quickly.

Strategic planning, while long range, does not seek to get everything organized across the next two to three years. Rather it endeavors to find new initiatives to respond to evolving trends and changes in the external environment and to invent ways to eliminate the contradictions in an organization that divert energy and commitment from achieving the vision.

Recognizing that change quickly makes traditional long-range plans out-of-date, strategic planning balances long-range strategies (two to three years) with the need for individuals and teams to decide *each year* and *each quarter* how to implement them in the context of their present situation.

Japanese managers are noted for the insight that when you get to the heart of the problem, the solutions become obvious. When volunteer leaders begin naming the contradictions, they begin to think of ways to get rid of them. They brainstorm lists of both innovative and tried-and-true ideas for programs and projects that will eliminate the contradictions. They organize these ideas into clusters of initiatives that will accomplish the same objectives. From these they discern the strategic directions that will give focus to the future activities of the association.

In one association, for example, the national board, state branch officers, and staff produced seven groups of ideas in response to the following contradictions: unclear leadership expectations, unfocused marketing efforts, unmet member needs, ineffective planning and implementation, and resistance to change.

Eight ideas, related to planning, were clustered and titled "focus branch direction." Grouped under another title, "structure branch success," were the following ideas: Clarify job descriptions, demand regular ac-

countability from branch presidents and regional directors, and publish and use success guidelines. These two groups of initiatives became part of a strategic direction called "planning for success" in state branches. The other five groups of initiatives became strategic directions related to member services and promotion.

The utility association board mentioned earlier developed a strategy to "increase industry cooperation." One idea that later became policy required a member, before asking the board to take a public position, to have the support of another member and include an impact statement relative to the businesses of all other members. The executive director and his assistant were elated because they would no longer be in the middle of this conflict.

6. Implement plans

Plans are implemented, in the first instance, not by boards or committees but by individuals who, on behalf of their association, have decided to make their vision real.

The task facing planning committee members is to decide which ideas should be implemented and when. Participants are asked to look through the strategies and describe one victory—a concrete accomplishment—they want to achieve in the next year. Victories need to be specific, measurable, and appropriate to the roles of those charged with implementing them. An education or program committee chair may want to champion a specific project with his/her committee. The chief elected officer may want to champion a specific project or may decide to take responsibility for getting buy-in to the plan from standing committees and general membership.

As volunteers talk among themselves about what they would like to achieve, some decide to take charge of efforts to accomplish a certain goal. These "champions" then recruit others to work with them; they write their desired achievements,

along with the names of their team members, on flip-chart sheets and present them to the whole planning group for initial review. Board members who traditionally see themselves as policymakers rather than as implementers usually decide to get involved, if not as champions, then as supporters of a particular initiative.

Champions and their project teams then flesh out the major steps or milestones in their plan. Victories may take from three months to two years to complete. The key is to break victories into quarterly mini-victories.

Staff are consulted for input on resource and support issues. The teams write their mini-victories on a wall calendar and present them to the entire planning group, which asks questions concerning timing, resources, support, and probability of success, and offers suggestions for improvement.

Participants' enthusiasm for their projects often leads to an overly full calendar. It's appropriate at this point for the group to ask tough questions about how realistic the plans of each team are, given what else is already scheduled. Once teams have answered questions and responded to suggestions, the group says, "Go for it."

Some retreats end at this point, after the chief elected officer or a designate gets agreement on a tracking and follow-up schedule. However, when there is time and implementation teams and standing committees are present, participants regroup to build action plans for the first-quarter events. Implementation teams then share their time lines, negotiate for staff support and resources, and eliminate overlap and conflicts.

During the closing session, I print out final documents in easy-to-read charts that include not only the brainstorm data but the group's analysis and decisions. I present this information as a symbol of the group's decision to reinvent the future.

7. Plan follow-up activities

Regular follow-up activities remind volunteers that their work is important to the chief elected officer and the future of the association.

One of the simplest and most often effective ways to keep a strategic plan on track is for leaders to periodically check in with the champions. Questions that the leaders should ask include: How are they progressing, what problems are they encountering, what solutions have they developed, and what support do they need?

Communicating success stories is another effective way to sustain motivation. Association volunteers are usually busy people. Without regular contact and encouragement, even the most motivated members may let association business slip in their list of priorities.

Quarterly and yearly review meetings also keep the plan alive. The chief elected officer meets with the champions and their teams to celebrate their accomplishments, reflect on what they've learned, build action plans for the next quarter, negotiate the necessary support, and report results to the board and the membership. At the year-end celebration, they reassess the association's position relative to the vision, make sure that the strategies are still on target, decide the victories for the next year, and report to the full association board and the membership.

Achievements on many levels

Follow-up calls to associations nine months to a year after planning workshops were held indicate that results are achieved on more levels than the obvious one of projected victories accomplished.

Better communication. A planning session that produces practical results in which all ideas and con-

cerns are honored and incorporated into the final decisions gives people a new picture of what to expect from board and committee meetings. The chief executive officer of the utility owners association reported that communication between the big and small companies, representatives of which now see their companies as equals, is more honest and board meetings are much less stressful.

Expanded responsibility for results. Previous planning meetings, one executive told me, had ended with a list of recommendations for "someone" to do; "someone" usually meant a national officer or staff member who had neither the personnel nor the resources to accomplish it all.

"When you asked for champions to implement the strategies and waited until individuals accepted the challenge, the image that 'international is responsible for everything' shifted," the executive said. "Within three months, most of the state associations reported that they had reviewed the strategic plan, built branch plans, and were implementing them."

Immediate implementation. Six months after a multilevel strategic planning project, I heard that official approval of some of the major implementation programs was being held up by a few "old guards" in the chief elected officer's cabinet. I checked this out with a member of the planning committee, who admitted it was true. "But that tells you how out of touch they are," she added. "We were so excited, we started implementing our plan the next day."

Accomplishments exceed expectations. In response to the question, "To what extent did you accomplish the victories you laid out for the year?" volunteer leaders said that they accomplished a lot more than

they thought they would. Some of the projects turned out to be more difficult than anticipated and had to be stretched out across a longer period of time. Others accomplished their objectives in half the time.

Where leadership was consistent in following up, momentum seemed to be better maintained. I crossed paths in an airport with a chief elected officer with whom I had worked a year earlier. When I asked him how his plan was going, he pulled out a copy of the three-year vision with more than half the items checked off, and told me how each had been implemented.

A can-do attitude. Chief executives consistently observed that strategic planning created a positive spirit that allowed good things to happen throughout the year. Not only was more accomplished, it seemed easier to do it.

Fueling leadership

Association members, by and large, are busy professional people. Yet many of the busiest continue to say yes to opportunities to give leadership to their associations.

As long as their vision is shared, as long as their energies remain focused on worthwhile goals and are not sidetracked by internal obstacles, as long as a positive atmosphere exists where people get things done and have fun doing it, these members will continue to find their involvement worthwhile.

A participative planning process that fully involves board members and other leaders can go a long way toward keeping commitment and enthusiasm alive and well. AM

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