

# PLANNING

## A. Objectives

1. Planning provides a sense of direction for the organization. It can motivate.
2. Planning gives shape to that direction through images and action statements.
3. Planning is an educational tool. It can help unify an organization.

## B. Moving from diagnosis to planning

1. Sense of direction and priorities -- Your diagnostic work needs to be given focus in a set of statements that define an overall direction. It is a statement of what the organization will be and do.
2. Format -- Decide on a format for the written statement, e.g., mission statement, vision statement, strategic plan, project or program description, etc. Select categories to use for organizing your work. (See materials on “Outlines of Strategic Vision/Plans” and samples.)

## C. Explore Options and Likely Consequences

1. It will produce a sharper sense of direction if there is an exploration of options for the vision, goals, strategies, solutions, project, etc.
2. At various points in the process, it is useful to project out likely results and consequences of a direction. How will it impact various subsystems of the organization? What role will each need to play? How are people likely to be affected? What is their likely response?

## D. Revisit the Question of the Type of Planning

What kind of planning is involved in this situation? A strategic vision or plan, a program plan, an organization development project/intervention, yearly working objectives, etc.

## E. A Strategic Vision

There are a variety of ways in which a vision might be created and drafted. Visions may be broad descriptions of an organization's hoped for future or more detailed presentations of how we will look and be in the next few years. Some visions draw more on images (e.g., “partnerships”), others on more of an icon (e.g., who the founder was, what the founder said.) Strategic visions may be most useful if they:

1. Include both what we are going to accomplish in production or service and who we are going to be.
2. Express the best values, hopes, and ideals of people with a stake in the organization.

3. Describe the organization at its best.
4. Show a gap between what “is” in the present and what is hoped for in the future.
5. Is grounded in the past and present life of the organization. If it is to be a vision and not a fantasy, it needs to be grounded in the history, strengths, weaknesses, and opportunities of the organization.

Visions can especially be a tool to enable:

- Self management -- Individuals and teams can use the vision as a guiding resource that can be used to align their work to the larger organization and other working units.
- Commitment -- Visions are meant to engage our passion and increase our commitment.
- They need to be exciting, to get us going.

In the September - October 1996 issue of Harvard Business Review, James Collins and Jerry Porras wrote about “Building Your Company’s Vision.” Here is their opening sentence: “Companies that enjoy enduring success have core values and a core purpose that remain fixed while their business strategies and practices endlessly adapt to a changing world.” They present an approach to vision that proposes two major components:

1. Core ideology consisting of -
  - Core purpose, reason for being, e.g., to preserve and improve human life; to make people happy
  - Core values which are few in number and stand over time, e.g., honesty and integrity, social responsibility, etc.
2. Envisioned future -- which is a picture of what we want to become or to create and which will require significant change in the organization. The suggest or envisioned future that includes
  - BHAG’s (or Big, Hairy, Audacious Goals) -- this is making a commitment to a clear, compelling, 10-30 year, huge challenge that will both engage people’s imagination and change the organization’s life
  - Vivid Description which creates a clear picture of the BHAG in people’s minds

Another approach to envisioning is to create a statement with a three to five year time frame that includes:

- Mission -- the business we are in now
- Core Values -- which guide long term life and direction
- Goals -- to achieve in the next few years related to productivity
- How We Will Live Together -- statements that describe the quality of life we seek together

## F. Strategic Planning

As with strategic envisioning, the concerns are long range, systemic, significant capacity building or a crisis that threatens survival. In practice, there may or may not be much of difference between strategic envisioning and strategic planning. It is usually a mistake to expect hard and fast definitions here. Planning manuals seem to differ in their defining of planning tools and concepts.

Planning usually implies more attention to establishing long range goals and objectives. In this case goals being broad statements of results or outcomes and objectives being aspects of a goal that are stated in a clear, measurable and time limited manner.

In strategic envisioning or planning, it is important that the top leadership be directly involved in drafting the final document. This is a way of requiring leaders to think through, integrate and own the direction.

## G. Operational Planning

Operational planning is used to make a strategic vision or plan operational. In the absence of a long range vision or plan, it may simply be an organization's annual planning process which establishes the yearly activities for an organization.

Operational planning usually takes one of the following forms:

Annual plan -- Specific goals and objectives set to help the organization move toward its strategic vision or plan during the coming year.

A five year plan -- Or it may be a three or four year plan. Some organizations like to work out a detailed year by year plan for moving toward their vision. If it is anything more than collected thoughts to possibly use in future years, it has the danger of locking the organization into too much detail and producing an inflexible response to changing conditions or needs.

Team planning -- Have each team or department do a yearly plan that is responsive to the overall vision/plan.

### H. Organization Development Intervention/Project Plan

This is an action - plan (see “I”) for an OD intervention/project. It might be an action plan for team building, conflict management, trust development, training in problem solving methods, training team facilitators, an action research process (in itself a form of the process of planned change), leadership coaching, intergroup cooperation, etc.

### I. Action Planning

Action planning is used for taking quick action on a project, program, intervention, etc.

Useful questions and method may be:

- What are the first three steps we need to take?
- What is something we can do in the next few days to move this along?
- Using force field analysis as a strategic formation method.
- Deciding on a general course of action along with the sequence and timing of steps.
- Use a chart.

Action	How	When	Who	Resources