

The Board's Role in Strategic Planning

5 Guidelines for Setting the Right Course

By Dan Bolin

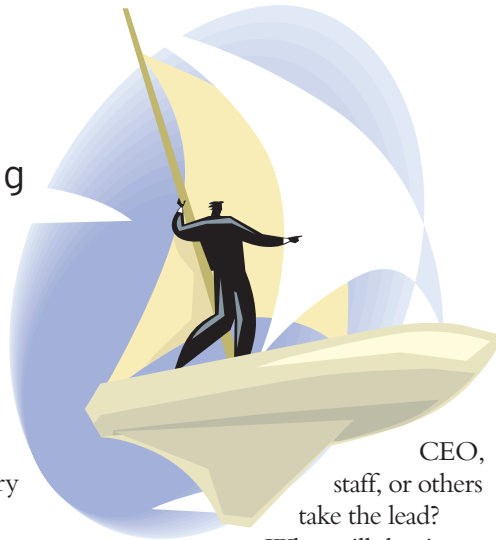
DISCOVERING GOD'S PLAN for the future of a non-profit ministry is a job that involves the board of directors. Done well, there are few tasks that boards face that can be more unifying—and done poorly, very few that carry as much divisiveness.

So what is the board's role in defining the next stop on the ministry's journey? Let me suggest five important considerations that should guide the board's strategic planning process.

#1. First, a serious time of corporate and personal prayer will begin the process by remembering whose ministry this is and whose plan you are seeking. The president of a ministry established an annual Friday night and all day Saturday prayer retreat for the board. The first invitation was met with calls from board members asking questions like: "How will we be able to pray that long?" Another asked, "Are we going to do any business or just pray?"

The actual results were astounding and the third annual prayer retreat is now the most exhilarating meeting of the year. You may not be able to follow this pattern, but start with a commitment to seek God's plan and continue to depend upon his guidance.

#2. Strategic planning must have a structure and the board must at least sign off on the process. Will you do the work internally or will outside consultants assist? Who will be involved in the process and at what levels? Will the board, board committee,



CEO, staff, or others take the lead?

What will the timeline be and what will the final product look like? Who will see the plan and in what form?

All these are issues that the board should agree upon at the start and then monitor the planning process on to completion.

#3. Next, strategic planning begins with the philosophical underpinnings of the organization. The names you give these fundamental concepts will vary from book to book, consultant to consultant, and organization to organization. As difficult as they may be to define, these are the terms that deal with the heart of your organization.

It is helpful to develop a glossary of key terms and provide shared definitions so that when words like mission, values, vision, and objectives are used they will mean the same thing to each person in the process.

The board must be crystal clear about why the organization exists, what results it wants to produce and how it will behave in the process. The better the board defines these central issues, the better the staff and volunteers will be able to focus the limited ministry resources to make the most significant impact possible.

#4. Strategic planning involves assessing the organization

and the environment within which it ministers. This involves internal and external assessments. For example, when using the metaphor of a boat, strategic planning involves checking the condition of the ship and studying the weather report.

Internally, "checking the condition of the ship" will include assessing: staff, finances, programs, facilities, communication systems, technology, donors, as well as the board itself.

Studying the "weather report" requires a look at the trends and changes within the environment in which the ministry operates. You can't change the weather but you can make decisions and adjust course depending on the conditions you face.

#5. Finally, the board must agree upon the future to which they feel God is directing the organization. The results your organization is seeking must be defined so that the ministry can focus its financial and material resources, energy, time and creativity of its staff, as well as the attention of the board in coming years.

Changing the plan is not a bad thing. Operating without a plan leaves the ministry vulnerable to the "next great idea syndrome." The board must monitor the plan and ensure that the resources of the organization are being funneled into producing the agreed upon results.

When there is good reason, the board should modify the plan, but this is done intentionally and for well-studied reasons. Monitoring protects against institutional drift that can move your ministry off course one degree at a time.

Good planning requires the insights of many contributors but the final decision rests with the board. Pray, plan the planning process, address the deeper questions, assess internally and externally, and then set the direction and monitor the course.

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