

Organizational Planning for Change

Integration of an Outcome Focus

Once you know the community change to which you want to contribute and the role you want to fulfill, it is important to create the right combination of plans to get you there. Some plans are formalized and others are informal, perhaps sketched on a pad of paper and kept in a file.

Layering Your Plans

Most organizations have several layers of plans to meet the specific needs of different audiences: the community, the organization, the program and its funders, and staff. Each layer has a different time frame. At an organization level, planning occurs infrequently. At an operations level, it is happening weekly and sometimes daily. The size and budget of your organization will determine how many layers of plans you need.



Connecting the Layers

Each level of planning should be consistent with your values, vision and mission. Strategic Planning ties most directly to these higher level statements. This activity positions your organization as a whole, to respond to a changing environment – your changing community. Implementing the strategic plan often involves a business plan and, in some cases, a capital plan. Every year, the strategic plan is revisited with a program planning process.

Program Planning allows you to identify the best program mix to increase the likelihood that your organization remains in tune with its strategic plan. For each program, an outcome measurement framework is produced as well as a budget and evaluation framework. Throughout the year, the outcome measurement framework, budget and evaluation framework are used as a reference for day to day decision-making on such matters for staff workplanning, cashflow, facilities scheduling, and program monitoring and evaluation.

Identifying Strategic Issues and Opportunities

When the internal and external environments are assessed, important information is available to strengthen the strategies and identify potential risks. You can put this information to use by making a list of strengths, challenges and opportunities and obstacles that you want to address in your strategies.

When reviewing the internal and external environment, you can identify where the organization or its program might be at 'risk'. Risk is "the chance that an unwanted event will result in the loss of something of value". These risks become quite real and easier to plan for if you develop scenarios of what could happen if the event actually occurs and conduct a risk assessment (Tool 3). Assessing risk is important because, if you know what your organization is up against, you are better able to reduce its influence on your work.

"If you don't know where you are going, any plan will do."

– Peter Drucker

"I skate to where I think the puck will be."

– Wayne Gretzky

Formulating Strategies to Fulfill the Vision while Addressing Risks

This is where you identify key strategies that, in light of the changing environment, are most likely to move your organization toward the community change that is the preferred future. It is also a good idea at this stage to develop a risk management plan to increase your chances of being able to fulfill your key strategies (Tool 4).

Even when programs are up and running, it is a good idea to check back on the questions you might have asked in strategic planning. Once programs are operating effectively and being evaluated, it is a good idea to revisit previous steps. Information collected in each phase is fed back into the organization to support management processes.

Revisiting the Previous Steps with your Eye on the Planned Social Change

Depending on the process, strategic planning doesn't always flow smoothly from one step to the next. Inevitably the process moves forward and backward several times before arriving at the final set of decisions. To participants, it can sometimes feel more like a roller coaster ride than a sequential planning process. But once an organization has a strategic plan in place, it is well positioned to plan programs that will achieve the desired change and contribute to its vision.

Programming for Social Change

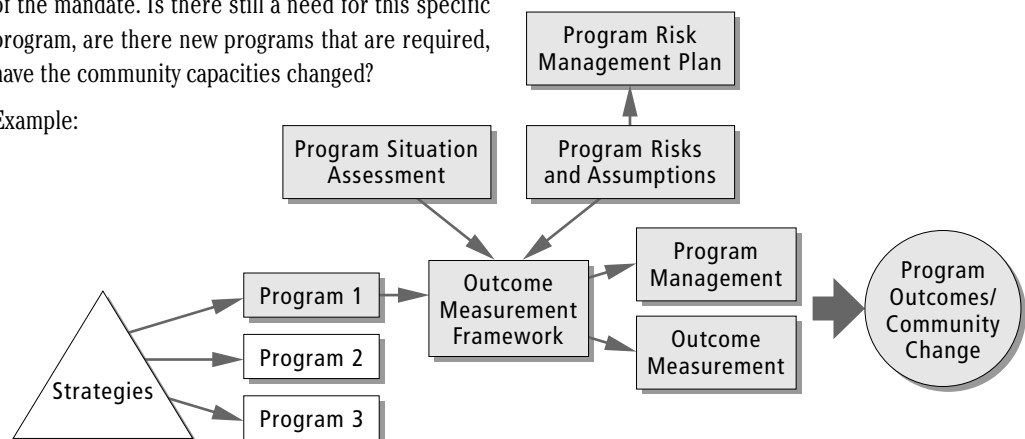
This is where the rubber hits the road. The organizational strategies that you have developed give you solid direction for the development of programs and other organizational initiatives that the organization believes will lead to the preferred future. The next step is to apply the same strategic thinking to program planning.

You now have the information you need to map a program, manage it and measure the outcomes or changes that were created. It is a good time to develop an outcome measurement framework (the program equivalent of a Strategic Plan) for each program or initiative.

Planning for Outcomes from Your Strategic Plan

The community change logically leads to a revisiting of the mandate. Is there still a need for this specific program, are there new programs that are required, have the community capacities changed?

Example:



Tool 3

Developing a Risk Management Plan

Purpose

To assist in the articulation and assessment of potential risks associated with the implementation of the project and the development of a risk management strategy to address these risks.

How to Use

The following steps will guide you through an assessment of risks associated with your program.

When to Use

- When you are planning your program
- When you are conducting a program review

Step 1: Articulate of Risks

List the assumptions you identified when developing your outcome measurement framework about conditions that need to be in place for the program logic chain to hold. Identify the risks that these assumptions or conditions will not be in place and develop corresponding risk scenarios.

Assumptions	Risks	Possible Scenarios

Step 2: Analyze the Risk

Put these scenarios through an analysis that includes two questions:

- What is the likelihood that the scenario will unfold? (Low, Medium or high)
- What is the impact that this scenario will have on the program? (Minimal, Medium or Severe)

Risk Analysis Matrix

		Likelihood of Occurrence		
		Low	Medium	High
Potential Impact	Minimal			
	Medium			
	Severe			

Risk Analysis Where you have checked boxes numbered 1, there is a acceptable level of risk, addressed through day to day management activities.

Where 2 is checked, a risk monitoring strategy is required.

Where 3 is checked, a plan to mitigate the risk is required.

Step 3: Developing a Risk Management Plan

For all risks identified as a 2, describe, using the following table, what monitoring strategy you will adopt.

Identified Risk	Risks Level	Monitoring Strategy

For all risks identified as a 3, describe, using the following table, what mitigation action you will take.

Identified Risk	Risks Level	Mitigating Action

Tool 4

Aligning with Organizational Strategies

Purpose

To help align your outcome measurement framework with your organizations strategic directions.

Description

This tool allows you to assess the match between your outcome measurement framework and your organization's strategic direction. It does this by listing the strategic directions, updating them, and determining where this new program fits in.

When to Use

- At the beginning of any new project or program
- When you are reviewing and updating your outcome measurement framework.

How to Use

In Step 1, determine if you have an existing set of strategic directions and assess whether they maximize current opportunities internally and externally and minimize constraints identified in Tool 2.

In Step 2, if you do not have an existing set of strategic directions, consider undertaking a Strategic Planning process.

In Step 3, identify which Strategic Direction is being fulfilled with this new program

In Step 4, explore a possible course of action for those program that do not fulfill a strategic direction through a series of questions.

Step 1: Articulating Strategic Directions

Briefly list your key strategies below and identify how these strategies address internal and external opportunities and constraints.

Strategic Direction 1	Opportunities Maximized	Constraints Minimized
Strategic Direction 2	Opportunities Maximized	Constraints Minimized
Strategic Direction 3	Opportunities Maximized	Constraints Minimized

Strategic Direction 4	Opportunities Maximized	Constraints Minimized
Strategic Direction 5	Opportunities Maximized	Constraints Minimized

Step 2: Undertake a Strategic Planning Process

If you do not have an up-to-date strategic plan, consider holding a Strategic Planning Process. Building strategies is an in depth process that is undertaken collaboratively with the board and staff over a period of months, often assisted by an external facilitator. There are many guides on how to do strategic planning available on the Internet. One guide that is particularly useful the Conservation Company's "Ten Keys to Successful Strategic Planning" available at: www.consco.com

Step 3: Link Your OMF with the Strategic Directions

Discuss the following questions as a group:

- Which strategic direction(s) does the program fulfill?
- Are there relevant and appropriate changes to the outcome measurement framework that would increase the fit with the strategic directions?
- If the program does not match any strategic directions, ask yourselves why the program should be offered through your organization?

Step 4: Reviewing and Revising

Discuss the following questions as a group:

- What changes should be made to the Outcome Measurement Framework?
- Does the changing internal and external environment require a change in strategies? If so, what changes are required?
- If not, should you be undertaking this project?
- If so, should you be undertaking it alone or in partnership?