

To: Jane Dembner
From: Griff Hall
Re: 2014 Strategic Plan Assessment Report
Date: January 15, 2019

Framework for Assessing

That a strategic planning effort should guide an organization to success is an underlying assumption built into probably every planning effort and captured by the well-worn phrase, “Failing to plan is planning to fail.” But how true is that assumption? The answer, according to multiple surveys and studies, is about 25% to 30% of the time. The question then becomes, what can an organization do to beat those odds and craft a strategic plan that truly guides it to success. One way to do that is to use a five-question framework when developing a strategic plan.

1. To what extent are the goals in the plan achievable?
2. Are those goals the right goals to advance the organization’s mission and vision?
3. How well is the plan integrated, where the plan’s elements were connected with and supportive of each other?
4. How complete is the plan – does it cover the essential functions of the organization, e.g. constituent services & market forces, financial, operating model, human resources?
5. How clear and concise is the strategic plan document?

The strategic plan can also be assessed for its role in aligning the organization. One of the fundamental purposes of a strategic plan is to align an organization around a set of goals and processes that will achieve outcomes believed to be instrumental to having an impact on the constituencies served by the organization. For that, its clarity in promoting priorities, behaviors, actions, investments, and cohesiveness among the parts of the organization become part of the assessment. A useful model to guide the alignment and integration of strategic planning elements includes:

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Achieving organizational alignment and success through the strategic plan begins in the strategic planning process. Four managerial functions are essential to that: leadership, human resources, managerial skill, and external support among constituencies. The strategic plan is thus an essential step in the ongoing activity of strategic management – implementing the plan and adjusting when necessary.

It must be noted that not all strategy is deliberate or intentional. Emergent strategies can form gradually as decisions are made one by one in response to a series of small changes in the environment, many of which may be unanticipated. Looking backwards, one might see a pattern or strategy develop, but at the time they can seem like minor adjustments. Other times a significant and unforeseen change in the environment may present an opportunity or expose a threat that calls for a strategic response.

This report will analyze Columbia Association’s (CA) 2014 Strategic Plan by assessing the strengths and weaknesses with respect to the strategic goals and note the opportunities to incorporate what worked well and ideas for changing things that did not work well.

2014 Strategic Goals

Answering the first question in the framework will lead to assessing what worked well in the case of those goals achieved and what stood in the way of those goals not achieved.

Goals are clear, concise, and focused on the essential functions that CA provides. The consistency of the strategic plan goals framework used in the President’s Reports, FY18 Progress Report, and other reporting signal a level of priority, organization, and progress. Certainly the actions identified in Mr. Matthews’s CEO reports represent an impressive progress along the lines of the five goals.

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The 2014 Strategic Plan goals have another advantage: They are squarely aimed at the stakeholders served by CA. This may seem self-explanatory, but frequently strategic plans are aimed at making or keeping the organization dominant among its peers as a way of proving its value and success. This deceptively aspirational approach risks placing the organization's stature ahead of the constituents it serves. The most enduring strategies continuously place the priority on the people it serves, not the organization's stature among its peers.

A quickly recognizable common denominator among all the goals is the absence of metrics and specifics. It is therefore hard to know to what extent they were achieved. There may be practical reasons for this consistency, yet a risk in lack of specificity at the strategic level is that it can cascade into the organization and negatively affect accountabilities, focus, and even morale. This same common denominator was also present in the 2011 Strategic Plan.

The CEO reports suggest significant progress on each goal, yet it's unclear how to determine if the organization met, exceeded, or didn't meet those goals. For example, Goal 5a indicates a need to improve CA governance structure. Structure, whether in governance or management, is a design intended to accomplish an end. We would ask, what intent was sought through an improved governance structure? Perhaps it was streamlining, efficiency, or transparency in decision-making. Regardless, linking goals with intent stands to bring clarity.

2014 Mission and Vision

Have the 2014 strategic plan goals been the right ones to advance the mission and vision of CA? The intuitive answer seems to be, yes, based on CEO reports. But it's hard to know concretely. In identifying the organization's purpose, ideally the characteristics of a mission statement will include:

1. Identifies constituencies served
2. States services provided
3. States why the organization exists
4. Describes the end result the organization seeks to achieve
5. Is clear and concise

CA mission: *Working every day in hundreds of ways to make Columbia an even better place to live, work and play.*

CA's mission statement captures numbers 1, 3, and 5 (partially). Addressing numbers 2 and 4 would help provide definition for the organization. While number 5 is concise, it is difficult for the uninitiated to have a clear sense of what CA does to achieve making Columbia a better place to live, work, and play.

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In identifying where the organization seeks to go, ideally the characteristics of a vision statement will include:

1. Describes impact on constituencies
2. Inspirational
3. Achievable
4. Unique or distinctive
5. Is clear and concise

CA Vision: *Making Columbia the community of choice – today and for generations to come.*

CA's vision statement captures numbers 2, and 3 (partially). Addressing numbers 1, 4 and 5 would add specificity and clarity.

The 2014 mission and vision statements represent more concise versions of those appearing in the 2011 strategic plan. Crafting mission and vision statements is no easy task for any entity. For a community organization with multiple constituencies it can be an even more arduous task, often complicated by a design or approval by committee process. A frequent result of such a process is a statement that wins approval based on language that is hard to oppose because it doesn't state specifics. We recommend that new strategic goals be oriented toward that end and that mission and vision statements be as specific as possible.

A strategic planning effort is typically an ideal time to take this up. In our experience, the opportunity to revisit the mission and vision is often best after leaders have assessed the organizational environment along with the strengths, weaknesses, opportunities, and threats. We plan for this be a part of our March retreats and ensuing activities.

We find that too often, organizations attempt to tackle these statements in a one step process or time allotment. We suggest a structure for crafting a mission and vision statements that includes leadership first setting about reaching agreement on the desired characteristics of the organization's mission/vision statement, and then to state as concisely as possible each characteristic without attempting to put them into a few sentences. Letting some time elapse between that stage and putting the characteristics into one or a few sentences gives people a chance to sort through ideas before committing them to a document. Once drafted, testing them internally and among constituencies often yields further insights and adjustment before final agreement. Allowing the process to play out without an artificial deadline while diligently staying on the task until completed is more likely to yield a mission and vision that meaningfully guides an organization.

A view of the last two strategic plans

Comparing the 2014 Strategic Plan with the 2011 Strategic Plan suggests it became important to reduce the plan complexity and more deliberately identify goals and objectives. We believe it's important to continue with a concise strategic plan document. We'd also recommend that strategic goals and sub-goals include implementation plans and expected dates for accomplishment. Invariably these may need to be adjusted with time, yet the evidence is clear that regularly assessing, and re-evaluating timelines if necessary, helps keep the accountabilities, focus, and inter-team dynamics better aligned.