

NGO NEWS for the Eastern Caribbean

Linking Environmental Policy Concerns and NGO Institutional Development

St. Thomas, V.I.

March 1989

PLANNING FOR SUCCESS

PLANNING: A detailed scheme, programme or method worked out beforehand for the accomplishment of specific goals.

PLANNING is a dynamic, ongoing process within an organisation. It is the basis upon which the group designs its ongoing programmes; it determines the path an NGO wants to take to achieve a vision of its future.

At best, organisational planning is an imperfect process. Yet it can provide the framework to assist an NGO in allocating its scarce resources and in making decisions.

TO PLAN OR NOT TO PLAN

Most organisations make planning seem complicated. There is an underlying assumption in non-profits that its overall mission is so demanding and its purposes so important that planning can best be defined as: "we'll do as much as we can and that's all we can do."

Thus, most NGOs are governed by what Brian O'Connell calls the "bright idea" form of planning. Someone gets a "bright idea" and off the group goes in that direction. It is extremely important, however, for NGOs to overcome such tendencies which result only in simplistic, short-sighted, and narrow searches for organisational creativity.

Why exactly hasn't organisational planning taken hold in many NGOs? In part, the answer is because NGO leaders view planning as:

- too time-consuming

- keeping the group from "more important" work
- impossible to do because, to plan, the group is required to react to unknown future needs and external conditions not controlled by the organisation.

Given these reasons, the NGO tends to resort to "shoot-from-the-hip" planning strategies which do little but keep the group in a state of chronic or intermittent crisis. The overall perception is that there is little to do except to keep one's head above water, one day at a time.

Alternatively, a number of benefits flow from a clear, succinct, and shared vision of the organisation's future, i.e., from good strategic planning.

(1) Leaders and members are given specific, reasonable, and supportive guidelines of what is expected of them and why. They see how they fit into the group's "big picture".

(2) Less time will be expended on debating what to do, how to do it, and why; and more time can be devoted to simply getting on with it.

(3) A clear and reasonable vision of success is created -- of the world as it is and the world as the NGO would like it to be.

(4) A well-articulated organisational plan helps leaders and members recognise barriers to success and thereby assists in overcoming them.

(5) Funders and other sources of assistance place emphasis on organisational and strategic planning -- both immediate and long-term.

THE ORGANISATIONAL DEVELOPMENT PLAN

The simplest form of organisational planning could be nothing more than an informal, unwritten agreement in the minds of key decision makers about the NGO's mission and programmes.

But coordinated action among a variety of NGO leaders and members over time usually requires some kind of formal, written plan so that everyone can keep track of what should be done and why. We call this an ORGANISATIONAL DEVELOPMENT PLAN. No NGO should be without one!

Key components of an institutional development plan are discussed below.

(1) MISSION STATEMENT

The NGO's mission statement is shown in the basic goals, ideas, and concepts that guide the organisation, usually over a multi-year time frame. It sets forth the reason for the organisation's existence.

This statement should be defined by the leadership body of the NGO. It should flow as directly as possible from the organisational "charter" and should set the overall direction of the group. The core mission affects everything to follow and therefore care should be given to its construction.

The mission statement may be modified over time to fit changing functions and programme objectives. Reexamining the core mission regularly serves to refocus direction when required, and a regular review of it should therefore become part of the ongoing planning process within any NGO.

(2) REVIEW OF CURRENT RESOURCES AND CONDITIONS

The second step in organisational planning is to prepare a description of the current resources and condition of the NGO. Specific questions or issues should be taken into consideration:

- Analysis of current strengths and assets as well as the liabilities or problems of the NGO.
- Review of current resources (revenues, property and capital assets, staff, volunteers, the Board, publications, library, computer system, etc.).
- What has been accomplished in the last twelve months? Is everything produced related to the core mission of the NGO? If not, it has not contributed to the organisation's reason for being.
- What didn't get done in the last twelve months? Why?
- Examine the quality of the services and programmes being provided. Are the NGO's "clients" satisfied?
- Does the NGO have a data collection system which substantiates programme results? If so, what do these numbers or other quantifiers say about the NGO's service delivery system?

Implementing steps (1) and (2) above will help the NGO later to identify what is in fact possible and what is really most important.

(3) IMPROVED CONDITIONS

The next step in the planning process is to describe the improved conditions the NGO would like to achieve. What does

the NGO want to look like in twelve months (a reasonable time frame for an organisational plan)? What improvements are judged attainable?

The improved condition description should be stated in tangibles (i.e., in precise terms), not abstractions. It should be so specific that the improvement will be readily recognised.

Improvements in conditions are often stated as organisational objectives, e.g., increase membership from 150 to 175; expand participation of volunteers; improve capability of the NGO's accounting system; expand benefits to members; improve community services.

The NGO also needs to look at what needs to be done in the next twelve months (if it is drafting an annual planning document) in terms of its continuing programme responsibilities. What can realistically be accomplished? What is it going to take to achieve programme goals? How can current programmes be improved? What new programmes should be added to the NGO's agenda? What important projects cannot be done in the next year?

(4) TACTICS

Organisational tactics are those specific ways and means for achieving the improved conditions; they provide a road map to guide the NGO from its present position to the desired changes.

For example,

To increase membership from 150 to 175, the NGO will: better publicize benefits; conduct two major membership campaigns; develop promotional informational material.

To expand participation of volunteers, the NGO will: initiate an

environmental monitoring programme using volunteer members.

To improve the capability of its accounting system, the NGO will: form a study committee to explore options; provide additional training for staff.

To expand services to members, the NGO will: up-date mailing lists; conduct a survey of member priorities; increase the number of news circulars sent to members.

To improve community services, the NGO will: review current level of community service and target areas needing improvement; recruit more volunteers to expand services; conduct a fund raising drive to expand its ability to deliver greater and improved services.

(5) OPERATIONAL LEVEL OF PLANNING

The operational level of planning involves the day-to-day execution of the tactics which have been identified to carry out programme goals and organisational objectives. Basically, the NGO needs to know who is going to be responsible for what by when and at what cost.

Operational planning should include:

- financial plans including operating budgets for the time frame covered by the organisational development plan;
 - planning calendar for specific activities and programmes;
 - staffing assignments and responsibilities (for staff and volunteers);
 - programme service delivery plan (time table for carrying out the NGO's programmes).
-

Many NGOs have experience in the planning process already -- namely, their fund-raising campaigns. For example, when an NGO says it is going to raise 20 per cent more money, it has to be very specific about its plan for achieving this goal. The same kind of strategic planning needs to be applied more broadly to the organisation as a whole.

No organisation can make detailed plans for every aspect of its future -- nor should it attempt to do so. Nevertheless, if NGOs become more involved in a common-sense approach to determining what their resources are and how best to assign them to meet institutional goals, they are less likely to end up zigging and zagging in all directions.

Institutional development planning is one means for NGOs to learn how to identify the most important things to be done and then find ways to lock in resources to accomplish those goals.

SOURCES USED IN PREPARING "PLANNING FOR SUCCESS"

Bryson, John, 1988. Strategic Planning for Public and Nonprofit Organizations. Jossey-Bass Publishers, San Francisco.

Jensen, D., 1982. "Unifying Planning and Management in Public Organizations." Public Administration Review, No. 2 (March/April).

O'Connell, Brian, 1976. Effective Leadership in Voluntary Organizations. Walker and Company, New York.

Private Agencies Collaborating Together, 1988. "Impact," No. 6 (Fall).

Society for Nonprofit Organizations, 1988. "Planning for Success." Nonprofit World, Vol. 6, No. 5 (Sept./Oct.).

Published by the Island Resources Foundation in cooperation with the World Wildlife Fund-US and Rockefeller Brothers Fund. Questions, comments, and contributions from readers are welcome. Information published in NGO NEWS may be used and reprinted by Caribbean NGOs with appropriate credit given to this publication as the source.

Island Resources Foundation is a non-endowed, operating foundation, chartered as a non-taxable, charitable organisation under the laws of the United States. Contributions to support this project and the many other environmental programmes of the Foundation are welcome.

Island Resources Foundation
Red Hook Centre Box 33
St. Thomas, U.S. Virgin Islands 00802
Telephone: 809/775-6225
Judith A. Towle, Editor