

Bonner Consulting's Planning Approach and Philosophy

At Bonner Consulting, my planning philosophy, techniques, and the tools I use are based on 25 years of experience working with nonprofits, small businesses and as a corporate Organizational Development leader. Although every organization has unique objectives in planning, my approach can be successfully adapted to the organization's needs and current situation. The amount of consulting I provide depends on what results are targeted (such as updating an existing plan versus building one from scratch) and the degree to which internal resources are available to support the effort. I believe strongly in these principles of planning:

- **Stakeholder Centered Approach Insures Buy-In:**

One of the reasons that many plans are shelved shortly after creation is that certain groups of stakeholders (i.e. board, staff, funders, clients) have not bought into the goals and objectives that were established. A keystone activity of my approach is to give a voice to as many stakeholders as possible during the diagnostic and fact-gathering phase.

- **Process More Than Product:** The point of a planning effort is not simply delivering a carefully crafted document to pull from the shelf from time to time. Such a document should be a byproduct of a rigorous thinking process that also involves the education of board and staff to the

organization's big picture, mission, programs, and current reality. An effective plan is a living document that is constantly being adapted to a changing environment. I help clients assume ongoing ownership of a process for continued strategic thinking and action after a front-end planning effort is completed. With that said, I also believe that the end documents produced (strategic plan and action plans) should be simple and graphical in nature so that they serve as a ready and constant reference for Board and Staff.

- **Realistic, Measurable, and Prioritized Objectives and Goals:** Planning ultimately comes down to an organization's ability to execute on goals in order to have the desired impact on mission and vision. Research has consistently shown that fewer goals done well have far more impact than many goals done in a mediocre way. I employ a disciplined and fact-based approach in sorting through and prioritizing ideas and options. As a consultant, I constantly seek to pose provocative questions, facilitate candid discussion/debate, and force a rigorous look at the facts discovered during the diagnostic phase. To help the organization's leaders assure the execution of the plan. I also challenge the number of and /or the realistic chances of reaching the goals set.

Approach to Planning

1

Define Outcomes and Process

Define objectives and outcomes of plan. Agree on timeline, tailor process to be used, logistics, and determine best way to engage stakeholders.

DOCUMENT

2

Stakeholder Input, Research, Analysis

Conduct assessments or other diagnostics and research. Gather stakeholder input (surveys, interviews, etc.). Analyze, summarize findings.

DOCUMENT

3

Set Objectives, Priorities, Goals

Using the Report of Findings as a basis, meet to facilitate consensus on strategic objectives priorities, goals, and measures.

DOCUMENT

4

Action Planning

Work with organization to create a tactical plan to set/reach the first year goals. Plan to include timeline and accountabilities.

DOCUMENT

5

Documentation and Implementation

Final plans documented and presented to Board for approval and adoption. Ongoing coaching and implementation assistance.