



SPiN: Strategic Planning in Nonprofits

Group Exercises to Liven Up Planning

Try one or more of these exercises in the boardroom, at a staff meeting, or at your planning retreat.

Three Why's

As a warm-up to strategic planning, check in with your board members/key leaders to learn why they are a part of the organization. This exercise is completed in pairs. One person is the questioner, and the other answers, then the roles are switched.

The questioner asks, "Why are you involved in this organization?" and listens attentively and supportively to the answerer. When they are done, the questioner asks, "And why is that important?" Listen, and then repeat this question one more time. This process allows each person to share more deeply their reasons for supporting your organization, and often gets at the ultimate outcomes your organization exists to address.

SWOT Development in Teams

A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis is a classic planning exercise. It allows a group to articulate their current internal organizational strengths and weaknesses and the external opportunities and threats facing the organization. Here is a fun, fast way to generate your SWOT snapshot.

Prior to your meeting, set up four stations around the room. At each station, post a sheet of flipchart paper and label each sheet at the top with one of the four elements of the SWOT (one station will say "Strengths," the next will say "Weaknesses," etc.). When you are ready to do the exercise, divide your group into 4 small teams and give each team a marker. Explain the meaning of the four aspects of the SWOT. Instruct them to start at one station and generate as many ideas as they can during a three-minute period. Then, the teams will move around the room clockwise to the next station and add their thoughts on the next topic. A timekeeper will track the three-minute increments and sound a bell or flash the lights when it is time to move to the next station. In 12 minutes, you will have your SWOT. It's a good idea to debrief the ideas generated and ensure that people are in agreement and understand one another's comments, so allow about 20 minutes for debrief and discussion.

What if money were not an issue?

In nonprofits, we often can develop a sort of chronic depression stemming from scarce resources. We no longer allow ourselves to dream big about what we might achieve. We shut down people by saying "We can't afford it!" If this resembles your nonprofit culture, consider this discussion starter to help you imagine a more abundant future.

Divide into small groups of 3-5 if you have more than 8 people participating. Each group should discuss the following question: "If our organization received an unrestricted grant equal to half of our annual budget tomorrow, how would we invest the money? What might be possible that is not possible now?" After about 20 minutes in small groups, have each group share their ideas with the large group. Think about what ideas could be carried forward in the planning process or incorporated into your organization's vision.

Cover Story Visioning Exercise

This exercise can serve as the launching point for developing the organization's vision. It's also fun and lets people be creative and think out of the box.

Using the flip charts and markers, work with a small group to create the front page news for articles that will appear about your organization in the future. The target date for this "publication" (it might not even be printed any more at that point!) is the Seattle Times (sub New York Times, Time, or whatever publication is relevant to the group) in ten years.

- In your group, agree on the title/headline





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- Write up the 5 or so points the article is making
- Provide charts, graphs or pictures that highlight the main points of your article
- Include a sub-article on the “facts and data” - - come up with some fun but possible facts about the organization’s size, revenue, clients served, etc.
- If you still have time, come up with another short “story idea” highlighting another facet of the organization (program, advocacy, etc.) that shows the organization in another dimension
- Think about the history that led up to this article being written and what we did today to make these changes possible.
- Be prepared to present your article and story to the group.

Allow small groups to work together for 25-40 minutes. At the conclusion, post “cover stories” on the wall and have each group present their work.

Dot Polling

Setting priorities among a number of ideas can be tough. Here is an exercise to help you surface good ideas from the group and then get a sense from the group of what is most important. This exercise can be used at a retreat to discern strategic priorities.

1. **Brainstorm** – Have an easel and flipchart paper ready, and designate a scribe to record ideas. Ask the group to generate lots of ideas in response to the question, “Given our mission and vision, what are the most important things we need to be doing over the next three years?” Since this is a brainstorm, record all ideas and do not discuss or evaluate the ideas now.
2. **Dot Polling** – Once the group has generated a number of ideas, give each participant 5 small dot stickers. Ask them to review the ideas, stand up when they are ready and place their dots on the ideas that they believe are the most critical to the organization’s success in meeting its mission. This part of the exercise can be combined with a break if it makes sense in the meeting/retreat agenda.
3. **Identify themes and set priorities** – The dots will give you a sense of what is most important to the group. In addition, through engaging with the list, people will probably notice some common themes among ideas (e.g. a number of ideas that relate to increasing visibility). Discuss the info and try to focus in on 3-5 top strategic priorities.

Additional Resources

Check out these sites for other techniques for getting meaningful conversations going:

- [Jeffersonian Dinners](http://www.thegenositynetwork.com/resources/jeffersonian-dinners/) (www.thegenositynetwork.com/resources/jeffersonian-dinners/)
- [Conversation Cafes](http://www.conversationcafe.org/) (www.conversationcafe.org/)
- [Liberating Structures](http://www.liberatingstructures.com/) (www.liberatingstructures.com/)

