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**Susan Scherffius Jakes** is the Associate State Program Leader for Community Development, an Extension Assistant Professor with NC Cooperative Extension and an Adjunct Professor in Psychology at North Carolina State University. She received a Ph.D. in Community Psychology from North Carolina State University.

**Mary Tschirhart** is a Professor of Public Administration at The Ohio State University. She served as Director of the Institute for Nonprofits and Professor of Public Administration at NC State University from 2008-2013. She has published extensively on nonprofit topics including board governance. She recently co-authored a text titled *Managing Nonprofit Organizations*. Dr. Tschirhart has served on six nonprofit boards in a variety of roles, including president, and led a nonprofit as its executive director.

# Module 6



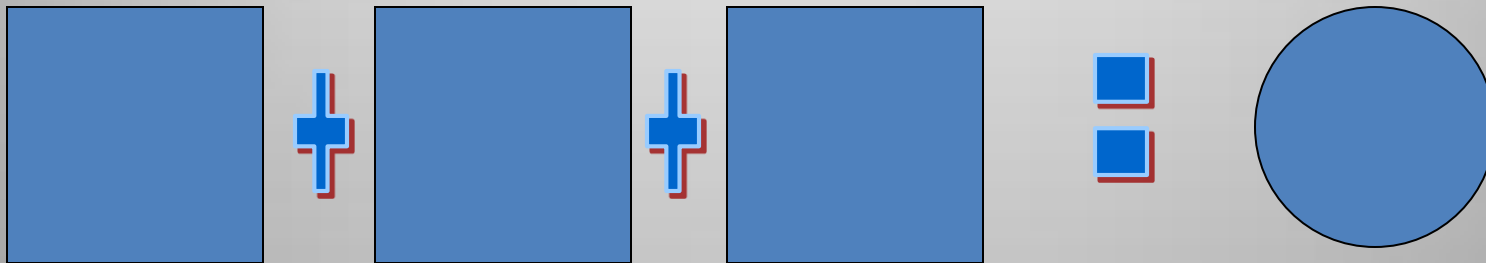
# Goals for this Module

Participants will be able to:

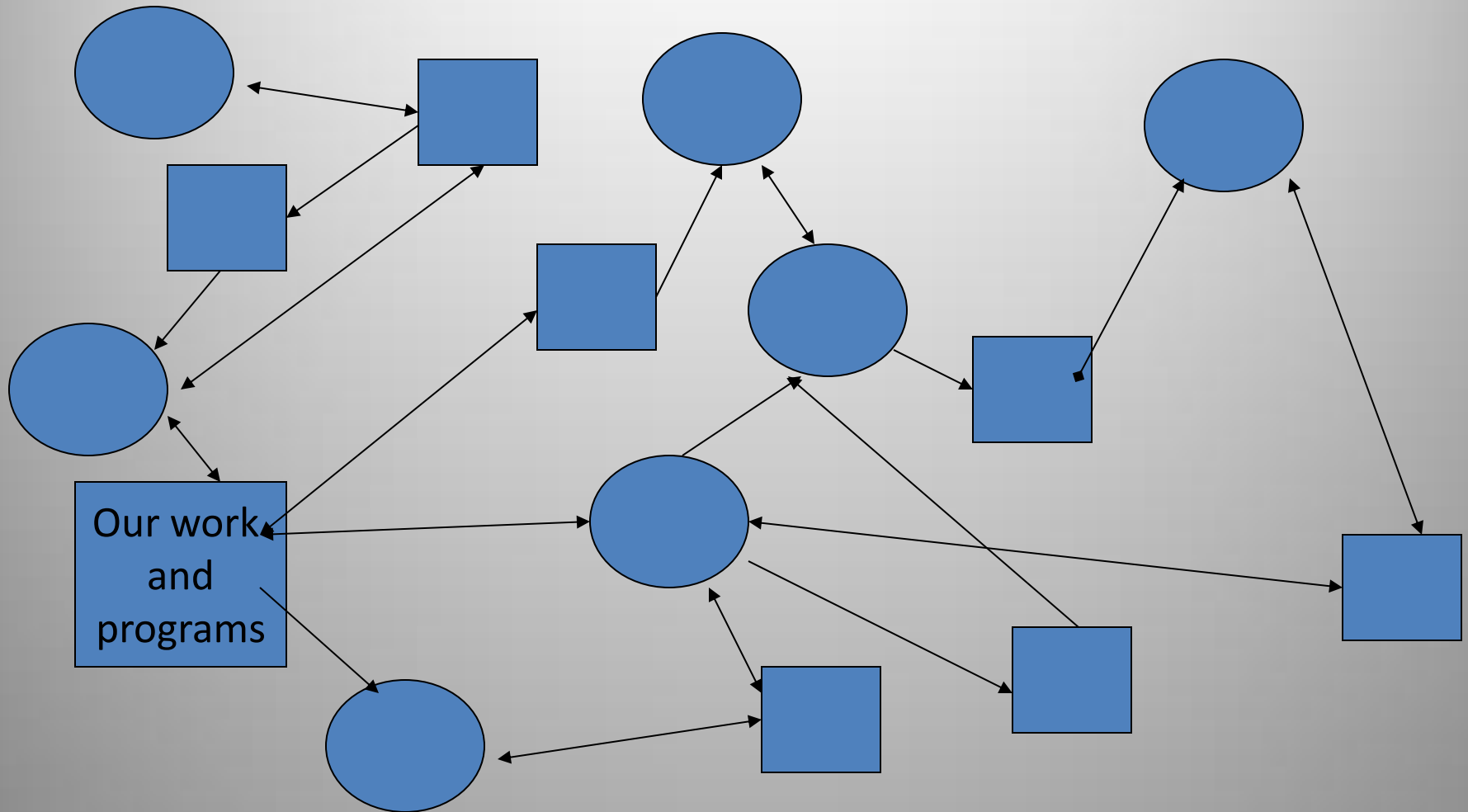
- articulate the importance of planning for organizational effectiveness
- build flexibility into plan implementation to effectively adapt plans to changing contexts
- Identify organizational values that support the balancing of flexibility and planning



# How we are taught to plan



# Reality



# How to be strategic and flexible

Strategically  
planned  
structure



Flexibility to  
innovate  
and adapt



# Uncharacteristic Curiosity





# Paired interviews

Tell a story of a time when you were part of an organization that was a “plan-ful” organization.



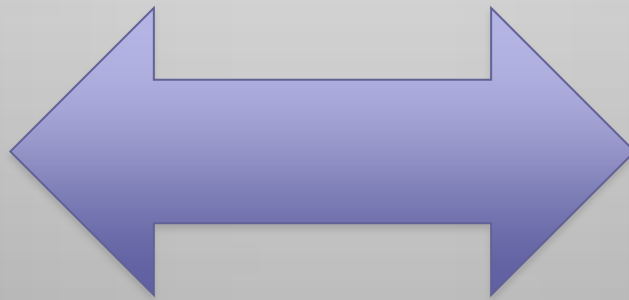
# Interview Questions

- What was your role in this organization?
- What did you do to make this responsive planning happen?
- What did others do?
- What were the results of this for the organization?



# What are the elements of an organization with a clear, flexible, and adaptive plan?

Strategically  
planned  
structure



Flexibility to  
innovate  
and adapt



# Benefits of good planning

(adapted from Carter McNamara)

Planning serves a variety of purposes; it helps to:

- Define the purpose
- Establish realistic goals and objectives
- Communicate those goals and objectives
- Develop a sense of ownership of the plan
- Use organization's resources effectively
- Focus on organization's priorities
- Helps frame evaluation
- Build a consensus around the organization's direction



# Vision versus Values

- Both can drive strategic planning
- Vision (where you want to go) should reflect values (the culture or way in which you operate to get there)
- Organic small organizations may run on values for a long time with no systematic plan or written vision



# Organizational Values

<http://www.youtube.com/watch?v=g6WHAfWqX3s>



# Vision and Values

- How do vision and values work with the organizational elements we talked about earlier to build organizational capacity in flexible planning?



# Evaluation

What are the key points of this module?

- What did you find most useful?
- What can we improve upon?
- Other items you want us to cover?





# Curriculum Modules

Module 1: Foundations for Transforming Board Practice

Module 2: Legal and Recruitment Issues

Module 3: Governance and Board Structure

Module 4: Enhancing Board Engagement

Module 5: Constructive Conflict

Module 6: Thinking Strategically

Module 7: Asking the Right Questions

Module 8: Board Meeting Communication



# Curriculum Modules

PDF copies of the curriculum modules are available for viewing on the

**NC Thrive portal:**

**<http://communitydevelopment.ces.ncsu.edu/local-government-nonprofits/>**



# References

Cooperrider, D.L., Whitney, D., Stavros, J.M. (2008). Appreciative Inquiry Handbook: For Leaders of Change (2<sup>nd</sup> edition). Brunswick, Ohio: Crown Custom Publishing Inc.

For additional information, case studies, articles, materials and meeting design please visit the Appreciative Inquiry Commons at <http://appreciativeinquiry.case.edu/>

McNamara, C. (2007). Field Guide to Nonprofit Strategic Planning and Facilitation (3<sup>rd</sup> edition). Minneapolis, Minnesota: Authenticity Consulting, LLC

