

# Vision: Leadership Focus



June 2008

## Fast Focus Tips

- Exceptional boards use strategic thinking in a regular, ongoing way.
- They strive to understand what has emerged and imagine what is possible.
- They generate solutions through far-ranging questions to drive deeper, value-laden decisions.

Find the book,

[\\*www.boardsource.org](http://www.boardsource.org)

## Strategic Thinking

### The Case of the Masked Strategic Plan

As Matt and Marnie finished their Friday morning coffee, Matt expressed a bit of excitement mixed with a hint of alarm. He said, "I am so intrigued about this new board I'm on! They just said 'goodbye' to two sacred cows in 6 months, although both decisions were part of a longer evolving process. They seemed very happy about doing it, too!"

"That sounds refreshing to me. I can't tell if it bothers you or if you are pleased." replied Marnie.

"Well," said Matt, "I accepted this board role because of new and ambitious work on the table, and it's been great. It's requiring the board to be more responsive and flexible than I've ever seen with board work, apparently more so than their usual pattern. It's actually very satisfying for board members. And the opportunities that our new partners are bringing to us are really helping us move our work forward beautifully. It's completely built into their strategic plan – to be so responsive, that is."

"So is there a question in there?" asked Marnie.

"It's just all new. I'm used to boards developing a firm strategic plan and then, if they remember, trying to implement it over several years. This new work requires us to ask each other challenging and inspiring questions, to think about new angles, and to be creative in drawing out the best in each other and our resources. That, my friend, is very rewarding work. It's a very responsible process, just far more exciting and far more productive for these new times."

Matt's board is demonstrating "**Strategic Thinking**," a close cousin to traditional Strategic Planning. It's the third principle in the book, *The Source: Twelve Principles of Governance That Power Exceptional Boards*.<sup>\*</sup> Read the rest of this issue to learn some tips and insights.



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**12 Principles of Governance That Power Exceptional Boards**

1. Constructive Partnership
2. Mission Driven
- 3. Strategic Thinking**
4. Culture of Inquiry
5. Independent-Mindedness
6. Ethos of Transparency
7. Compliance with Integrity
8. Sustaining Resource
9. Results Oriented
10. Intentional Board Practices
11. Continuous Learning
12. Revitalization

*Vision* features one 'power' principle in each issue.

# A to B: From Strategic Planning to Strategic Thinking

Traditional Strategic Planning still plays an essential role, to be sure. It helps set the organizational course, provides direction, and establishes a foundation for accountability and monitoring performance. Too often, though, it does not allow for flexible reactions to unexpected turns of events or new opportunities.

Here are some broad steps to help you keep what works while being more responsive.

1. Know exactly what your United Way is doing and why. Make sure you are spending time on efforts that support your values and resources and mission.
2. Use less SWOT (examination of Strengths-Weaknesses-Opportunities-Threats). Allow more time for inquiry into:
  - \* Dialogue
  - \* Stories of experiences, dreams, best practices
  - \* Adaptation
3. Retreat, retreat, retreat. Always have long-term goals and vision. It's vital to know where you want to go and to dream big for your organization. But an annual review or planning-thinking retreat and refinement phase is far more essential than any specific length of time in your plan. Devote significant time to this annual review, at least a half day, preferably a full day.
4. Always ensure strong buy-in from staff and key volunteers as you prepare to plan, create the plan, and review the plan.
5. Make use of an outside consultant to facilitate at least the primary planning-thinking meeting so everyone else can pay full attention and participate in the process.
6. Have a way to react to new opportunities and shift attention especially if the new idea is a perfect match with your mission.
7. Build in time at each board meeting to monitor progress, shape board recruitment, and identify ways everyone can contribute to the board's success.
8. Strengthen your board composition and make sure it helps you move toward your long-term goals.

<b>Responsible Boards x</b>	<b>The Source of Power =</b>	<b>Exceptional Boards</b>
Set direction Establish and review strategic plans Monitor performance against plans	Considerable time spent on consequential issues Constant strategic thinking Joint board-staff efforts to frame and explore issues Alignment of agendas and chief executive's goals with priorities	Become a strategic asset and a source of leadership Sharpen direction, address difficult issues, identify opportunities Generate solutions that are understood and supported

## Catalytic Questions Boost Strategic Thinking

- What three adjectives or short phrases best characterize this organization?
- On what list, which you could create, would you like this organization to rank at the top?
- Five years from today, what will this organization's key constituents consider the most important legacy of the current board?
- How would we respond if a donor requested proposals for a \$1-15 million endowment to the one organization in our field that has the best idea for becoming a more valuable public asset?

## Try New Techniques for Drawing Out Innovative Ideas

- ◆ Use scenario planning to help boards see into the future with key strategies on the table.
- ◆ Combine two unique ideas and make them work together.
- ◆ Reverse your viewpoint. Spend a minute describing a problem from another's view – male to female, urban to rural, elder to youth, veteran to newcomer. Learn from your new insights.
- ◆ Check your timing. Has a window of opportunity passed? Are you too far ahead of the pack? What adjustment can be made?
- ◆ Look for the second right answer. Great ideas can emerge over time. Rather than jump on one, let them settle. Make a list of all the ideas the first one brings out. Make a list of their opposites.
- ◆ Get support. Who else might be interested in your idea or your direction?
- ◆ Celebrate successes! Often the celebration inspires great new ideas or even better improvements.

**Be Intentional about improving strategies and performance.**

**Be Disciplined about what and how to focus thinking. Look in new ways from different angles.**

## Appreciative Corner: Big Thinkers, Big Questions

Boards find strategic work the most satisfying and rewarding of all board work. Provide the frame for them to sink their teeth into it with these great questions and ideas. Save some great thinking for each board meeting, too.

1. Tell a story about the most satisfying board work you have ever done. What made it so engaging? Who was involved? Why was it successful or rewarding? How can you bring those lessons to your current United Way board work?
2. What's the best headline you could read about your United Way, without wishing for any specific dollar donation or campaign goal?
3. What's the best legacy you can leave behind after your board service? What groundwork can you initiate, including key questions, that would move you toward that goal?
4. What would it take to resolve even long-standing barriers to our goals?
5. We often focus on filling gaps. What measured shift in resources would increase success in an area that is going well?



**Indiana Association of United Ways...Bringing Indiana United Ways together to help them create a successful future.**

**Relationship/Association - Members actively engage with their IaUW neighbors and peers around issues and experience, contributing to higher performance.**

- 63 member organizations
- 4community2 matching grant program
- Roundtables and collaborative assistance

**Learning/Training - Members involved with IaUW learning opportunities are strengthened to improve organizational functioning.**

- State Leaders Conference and recognition programs
- 4community2 technical assistance and training
- Regional conferencing and national program hosting
- Software user groups
- Vision Leadership Focus newsletter
- Indiana Nonprofit Resource Network

**Research & Development/Innovation - Members have improved capacity to engage organizational technology with confidence.**

- NP&AS, Nonprofit Processing & Accounting Service
- www.iauw.org and other Web site features

**Representation - Members receive substantial grant support and have strong state-level relationships.**

- Partnerships and strong relationships with Indiana University Center on Philanthropy, Indiana Coalition for Human Services, Indiana Voluntary Organizations Active in Disaster
- Public Policy
- United Way Council of States and other national involvement
- Indiana 211
- Youth Philanthropy Initiative of Indiana
- United Way of America

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## Give it a Try: Strategically Thinking Board Meetings

- Try new techniques for looking at complex and provocative issues. Try small group board work within meetings. There is no magic or requirement to have board meetings around a large circle or square. Bring the board back together to review ideas and make decisions.
- Allocate the lion's share of time to issues of substantial consequence.
- Move away from report-driven formats; carve out time for meaningful discussion that shapes organizational strategy and actions.
- Allocate time in meetings for key questions. Invite new questions ahead of each meeting or at the end of each one for the next time.

- Consider relationship building as a key technique for carrying out strategic goals. Spend time each meeting on how to maximize and grow relationships.
- Use a Consent Agenda that allows boards to approve select routine items in one motion if there are no questions or concerns.

