



Should You Do Strategic Planning or Board Development First?

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By Michael Daily, Executive Director Executive Service Corps

We have faced a couple of situations where we were asked by our clients which they should do first Board Development or Strategic Planning? More than one client wanted to tackle both simultaneously.

Some time ago we convened a panel of two strategic planning consultants and two board development consultants to address this issue. The board development consultants argued that creating a strong, high performing board was central to developing a great strategic plan. Board Development is first! The strategic planning consultants believed developing a good strategic plan was vital to determining the board composition and recruiting the right people to strengthen the board. Strategic Planning should be first!

My position then, as it is now is this: When talking to the leadership of an organization it becomes apparent there is more energy behind one initiative or the other. If the passion and energy is for strategic planning, do that first, if it is for board development, then that should be first.

I say that with one caveat. The organization must have a basic sense of mission and strategic direction. If the leadership cannot articulate an overarching strategic direction, then developing that is the first order of business.

For those who want to do Board Development and Strategic Planning simultaneously, I would suggest this. Either of these can be challenging to do well. When board development or strategic planning efforts are only partially successful, it is because of a lack of energy, resources or focus. To try both at the same time and do them well is nearly impossible. The Executive Director and the Board Chair are critical participants. Very few of either that I know have extra energy to commit to capacity building. In addition to the competition for time and resources, this adds an extra element of coordination between the two efforts.

More than half of the strategic plans we facilitate have a Strategic Priority to strengthen the board. Likewise, for board development projects an update to the strategic plan is often a part of the Action Plan.

I find smaller nonprofits often need “break” between capacity building initiatives to begin to implement whichever process they might tackle. Larger nonprofits or those updating a strategic plan may be able to overlap a part of the two processes, but I would never suggest simultaneously tackling Board Development and Strategic Planning head on.

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