

Adaptive Strategy Planning

Strengthening Resilience

An **Adaptive Strategy Planning**TM is an important factor in strengthening group or organizational resilience. The process of completing an Adaptive Strategy Plan helps groups and organizations accomplish the practice of **Looking Ahead** in **The Resilience Practice Mix**TM:

- It helps groups or organizations **foresee and anticipate** emerging opportunities, challenges, and trends.
- It **facilitates scenario planning** in which they can envision multiple paths and contingencies for the future.
- It's **adaptability (flexibility)** allows **rapid response** to both incremental and sudden disruptions without losing sight of the vision, mission, and strategic goals.
- When preceded by an Organizational Study, it can leverage what has been learned from that to inform the development of a strategic plan.



Resilience

"The ability to anticipate, prepare for, and respond and adapt to incremental change and sudden disruptions." (Denyer, 2017)

The Resilience Practice Mix is inspired by and adapted from Denyer (2017).

Our Adaptive Strategy Planning Values

- 1) **Adaptive Strategy Planning can be done quickly with quality.** Strategic planning provides a "snapshot" in time of where an organization has been and where it is planning to go. "Snapshot" scenes always change immediately after the picture has been taken. Therefore, long, drawn-out strategic planning processes can falter because the environmental variables affecting the plan change significantly between planning sessions. Also, this kind of approach often frustrates people and wears them out. Our Adaptive Strategy Planning is a tailored process that supports rapid, high quality strategy planning.
- 2) **Adaptive Strategy Planning needs to focus on doing more of what is already working well.** For this reason, we take an asset-based, appreciative approach to strategy planning, typically using tools and elements of Appreciative Inquiry in facilitating the planning. Indeed, there are weaknesses, threats, challenges, and problems in any organization. We also know that focusing on these rarely produces positive actions for the organization to take. Our appreciative process helps organizations identify what is working well already and to do more of it. It also helps organizations generate new energy and ideas for addressing the threats that hold them back from success.
- 3) **Adaptive Strategy Planning has to include a process for rapidly, thoughtfully adjusting the plan when needed.** Our process balances the need for establishing a long-range plan with giving a group or organization the tools, procedures,

permission, and support to monitor and to make necessary mid-course adjustments on its own.



We think Adaptive Strategy Planning is a lot like using a GPS in a car. The driver identifies the destination (vision and mission) and the GPS produces an overview map of how to get to the destination (strategy). Once the driver accepts the route, suggested turn-by-turn directions appear (activities and tactics) and action needs to be taken. When the driver goes off course, or circumstances

require the driver to take an alternate route, the GPS will make a mid-course correction and provide a new map (strategy) for getting to the final destination. Adaptive Strategy Planning supports a group or organization in updating their “maps” as needed. Adaptive Strategy Planning anticipates and supports mid-course corrections.

Benefits of Adaptive Strategy Planning

- **Reflective.** Adaptive Strategy Planning provides an opportunity for individual and group reflection to clearly discern the best path forward for the organization.
- **Flexible.** Clients learn how to add or amend strategies, activities, and tactics while keeping them aligned with the organization's long term vision and mission.
- **Alive.** It produces a living strategy that is not content residing in folder on a bookcase gathering dust. Clients will learn how to use the adaptive strategy plan to monitor the organization's progress toward its goals and how to use the information in the plan to inform future strategic decisions.
- **Brief.** A written adaptive strategy plan is created with the fewest number of pages necessary because it is meant to be used regularly by board members, executive leadership, management, and staff in governance, management, and even day-to-day decision-making. Most plans can even be made into a one-page infographic that captures the essence of the plan and provides a convenient “plan at a glance.”
- **Tools.** The tools help organizational leaders provide ongoing guidance and direction including, but not limited to, an understanding of the organization's competitive advantage, an organizational identity statement, and a strategy screen to assist in decision making.
- **Life giving.** It breathes new life into the process of strategy planning for participants and results in greater creativity, revitalized energy to work together, and renewed passion for the cause.

ADAPTIVE STRATEGY PLANNING: INFORMED AND INSPIRED BY

APPRECIATIVE INQUIRY

Appreciative Inquiry is a research-based organization development philosophy and methodology. “At its heart, AI is about the search for the best in people, their organizations, and the strengths-filled, opportunity-rich world around them. AI is not so much a shift in the methods and models of organizational change, but AI is a fundamental shift in the overall perspective taken throughout the entire change process to ‘see’ the wholeness of the human system and to ‘inquire’ into that system’s strengths, possibilities, and successes.”

Stavos, Godwin, & Cooperrider (2016)

INDUSTRIAL ACTION RESEARCH

Industrial Action Research is a consultant-driven form of participatory action research used in organization development. It is a practitioner focused, iterative process which draws on the consultants' direct experience of working with clients, observation of patterns, testing assumptions, receiving feedback, making improvements, and doing it all again.

Kemmis & McTaggart (2005)

THE NONPROFIT STRATEGY REVOLUTION





Adaptive Strategy Planning is inspired by the ideas of David La Piana described in his book, *The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid Response World*.

How does it work?

Our Adaptive Strategy Planning process engages, at a minimum, the governing body (e.g., board of directors) and the executive leadership of the organization. When time and resources allow, we recommend that other stakeholders (i.e., organizational staff, funders, organizational partners, clients, community members, etc.) participate as well. For example, **Context Assessment** benefits from having "many eyes" on the environment affecting the group or organization, hence, participation of other stakeholders in this step can be invaluable.

Adaptive Strategy Planning typically includes four basic stages. Each stage can be adapted to fit with an organization's needs, budget, or timeline. However, significantly adapting or eliminating steps can impact the quality of the strategy plan. Most organizations, using our approach, can have a new strategy plan in as few as 90 to 180 days, from start to finish, depending on the size of the organization and the organization or group's timeliness in contributing to the process. We have done strategy plans for global organizations and local groups. In all cases, we tailor the process to fit the organization.

Stages of Adaptive Strategy Planning

				
What	Context Assessment	Data Review & Analysis	Adaptive Strategy Planning Meeting	Strategy Plan Drafting & Approval
Purpose	To identify the most important variables in the organization's context or environment which can the process and the plan.	To create awareness among the planners of the context variables informing the plan and process.	To identify and align the organization's strategy vision, mission, values, and strategic goals.	To create a written plan for final approval and adoption.
What is typically Involved?	Organizational stakeholders complete a brief online survey. "Stakeholders" include board and staff members, and may include funders, clients, and others. As time and resources allow, interviews and focus groups will be used to illuminate survey responses.	Those who are tasked with strategy planning will receive a summary of the survey results to read and study prior to a planning meeting. As time and resources allow, this part of the process can also include convening meetings for community members to offer insights, affirm findings, and participate more fully in the process.	A facilitated meeting with the organization's planners to identify the strategic vision, mission, values, goals, and competitive advantage of the organization. It is in this planning meeting that the core components of the strategy plan come together.	Tenacious Change writes the first draft of the plan in collaboration with the organization's planners. Once editing and updating has produced a plan that is satisfactory to the planner, it goes to the organization's governing body for approval. Upon approval, the organization's staff or volunteers create an operational plan and begin implementation.

Additional Services Related to Adaptive Strategy Planning

- **Organizational Study:** Some organizations benefit from a deeper study of their current strategic position than can be done in Adaptive Strategy Planning. An Organizational Study can be done before the Adaptive Strategy Planning. An Organizational Study is a way of looking back at what an organization has been doing and taking stock of how well it has been performing. In this way an Organizational Study also contributes to *The Resilience Practice Mix*, which, as a whole, strengthens the resilience of nonprofit organizations, businesses, associations, and even whole communities.
- **Operational Planning Consultation:** Once a strategy plan has been created, implementation of the plan is the next logical step. An operational plan is created to guide implementation that aligns with the vision, mission, and strategic goals of the newly created strategy plan. Operational planning needs to be done by the people working day-to-day with the programs, resources, and workflows. This typically includes operational managers, supervisors, teams, frontline staff, and volunteers who are directly impacted by the plan because they work personally with clients or to provide services. Tenacious Change can provide consultation, guidance, and facilitation to those creating the operational plan.
- **Board & Leadership Development** (focusing on roles, responsibilities, and collaborative leadership): Even the best strategy still needs to be executed properly. Execution of the plan can be affected by the ability of the executive leadership and board or governing body to work well in partnership. Role and responsibility confusion can lead to a breakdown in the collaborative relationship. We can help board or governing bodies and executive leadership be more effective as partners by helping them clarify their roles, embrace their responsibilities, and work collaboratively.
- **Living Strategy Plan Coaching:** In the facilitated Adaptive Strategy Planning meeting we will provide basic instructions and recommendations for how to monitor the adaptive strategy plan and make the adjustments to it in a timely manner as needed. Additionally, we can provide consultation and coaching to the board and executive leadership related to monitoring the plan. And, when the need arises to adapt the plan in response to changing conditions or circumstances, we are also available to provide consultation and guidance to help make the necessary changes.

Meet with Us to Learn More

For over a decade Tenacious Change has been providing resilience and development services to small nonprofits and businesses often overlooked by larger consultancies. We know time and money are precious commodities. **Give us a chance to tailor a proposal that fits for you!**

Email us (info@tenaciouschange.us) to set up a complimentary conversation via Zoom, Google Meet, or by phone. In that time we can learn more about your organization, what you want from your Adaptive Strategy Plan and determine if we are a good fit for what you need. If we are a good fit, we will explain how we can help your organization **achieve high quality results** at a **fair value** within a **reasonable timeframe**. Let's talk soon!

References

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