

Housecalls at Work

Answers from Dr. Insite

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Dr. Insite is an ongoing column to address people-related issues in nonprofit organizations. For answers to your workplace issues, please e-mail your questions to DrInsite@coreinsites.com. All responses will be handled confidentially.

Dear Dr. Insite:

When I began as Executive Director of this association, we developed a strategic plan which has guided our growth and focus over the past two years. Recently, however, our new Board Chair has decided to take us in a new direction, essentially ignoring the agreed upon course of our organization. My staff and I are becoming increasingly frustrated. How do I move our Chair back on the right track without alienating or antagonizing her?

Dear Frustrated:

The problem you are describing is not uncommon. All too often, when current Board Chairs do not participate in earlier strategic planning efforts, they set their own agendas that are inconsistent with the plan. To promote their commitment, create a succession path for Board leadership so prospective Chairs participate in the planning process.

To tackle your current dilemma, an annual Strategic Update is a simple solution. This is how it works. Using interviews or open-ended surveys, gather information from each Board member on the organization's culture, Vision and Strategic Goals. Ask questions like: 1) Are the core values of the organization still moving it in a desired direction? 2) Are the current Vision and Strategic Goals still relevant? 3) Do you have any concerns not

addressed by the current strategic plan? Be sure Board members explain all responses; then compile the information and present it to the Board for discussion and decisions. In this way, your Board Chair can implement a new direction as long as the changes are affirmed by the Board. Don't forget: Revisions to the strategic plan should be communicated with the staff and membership so everyone supports the effort.

A strategic plan is not static. Many things can happen both internally and externally to impact the course an organization takes. Remember that ongoing strategic planning requires a comprehensive focus involving all stakeholders every three to five years and then an annual Strategic Update as well as ongoing reviews to stay strategic. ●

Sheila L. Margolis and Ava S. Wilensky hold doctoral degrees in Human Resource Development. As the principals of CORE InSites® Inc., they are well known organizational development experts specializing in organizational strategy, the strategic use of human resources and program evaluation. Additionally, Margolis and Wilensky are authors of There Is No Place Like Work: Seven Insights for Creating a Workplace to Call Home (OD Press, 2004). Call them at (404) 255-4007 or visit online at www.coreinsites.com.