

TAKING PROGRAM SNAPSHOTS:
PLANNING STRATEGIES WHEN THERE ISN'T TIME FOR STRATEGIC PLANNING

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Periodic strategic planning is critical to long-term program success. However, comprehensive strategic planning can be overwhelming -- and costly in terms of human and fiscal resources. Here's a process shortcut -- taking program "snapshots" -- designed to help program teams make mid-course corrections within the strategic planning cycle. This much shorter process (6-8 weeks) is particularly effective for small program areas or project teams.

The advantages of taking program snapshots are, first, you can obtain qualitative information quickly from clients, colleagues and administration for use in program planning. Second, it provides optimal working environments for planning by bringing people in to the process sequentially rather than concurrently. And third, it allows a widening circle of people to become champions of the program before the solutions are finalized.

Step 1: Informally interview colleagues, clients and administrators affiliated with the program. Ask what they view as the strengths and the weaknesses of the current program, and what changes they'd like to see in the future. You're looking for perceptions, not quantifiable data. This takes about three days, counting waiting for call-backs.

Step 2: Draft a short narrative report about what you heard. This isn't rocket science so don't agonize over it; plan on a maximum of one day.

Step 3: Convene a small group of Creative Thinkers. Bring together five to eight people who love to explore new possibilities. Some of these people may be within your organization and some may be from the outside. Promise them one day in a comfortable, non-intrusive environment; a day with minimal structure and maximum creativity; a day with no naysayers. They'll jump at the chance!

When the group's ready to start, quickly share your narrative report, identify any "givens" (such as "must be implemented at the start of the fiscal year"), describe what outcomes they should achieve by the end of the day (such as "propose 2-4 workable models") — and stand back! Besides having plenty of paper, pens, flipcharts, food and beverages on hand, no facilitation is needed or desired. You're there to clarify any points and to make sure they have everything they need.

They'll have a GREAT time, bouncing ideas, grabbing pens to write on charts. The energy levels will stay incredibly high all day long. Several of them will exclaim, "This is what work

is supposed to be like!” And yes, at the end of the day, they’ll hand you the product you requested.

Step 4: Invite Reactors to ...react. The next day (or as soon as possible), the Creative Thinkers will introduce their proposals to six to eight reactors, people skilled at listening and analyzing the feasibility of ideas. The reactors are told to “shoot holes” in the models and to “rip ‘em apart” — which they’ll do with great glee! These people’s strength is in finding flaws; conversely, this means that they’re also skilled at recognizing good ideas when they see them.

Quite quickly, without any prompting, they’ll find themselves saying things like “Well, it won’t work because you have A in here, but if you did B, you’d get the same results and avoid this pitfall.” They’ll begin to find creative solutions, tweaking here and there, but, without changing the essence of the proposals.

Again, minimal interference from you. At the end of this day, you’ll have several strong proposals, names of the next people to bring in to the process — *and* 12-16 people committed to the ideas.

Step 5: Now, it’s your turn -- to synthesize the materials offered by the creators and reactors. Draft a working proposal document, making sure to include a short overview, the advantages and disadvantages of each of the proposals, estimated budget and phase-in time. Don’t forget to prominently display the names of the people who crafted the concepts. Distribute the document the following day to appropriate decision-makers, and of course, to the people who put it together.

Maintaining forward momentum is vital so plan to write this document within a day or two after the meetings. The quick turn-around time implies respect for the time and energy the creative thinkers and reactors gave to your program, and minimizes rumors. And, in the next phase, as new insights and clarifications come pouring in, keep sharing that information.

Step 6: Identify and approach additional stakeholders -- and do it right away. These people are generally those who would be implementing (field personnel), or supporting (office staff) or administering (program leaders) the proposed new program actions. Now’s the time to bring them into the planning loop to minimize glitches, to develop understanding of what’s being attempted, and to garner more champions for the ideas. Invariably, the additional stakeholders are very willing to give good advice, especially before the proposals become reality.

Another advantage to moving quickly, is that many of the creative thinkers and the reactors will informally talk about the proposals to anyone who will listen. Why? Because they found the process exciting, they have ownership, and they know the ideas are valid. The circle of people who have a stake and an enthusiasm for the concepts widens even more. In two weeks, you can easily have an additional 50 people to add to your list of “authors.” Expect to spend about 10 days on this step.

Step 7: Implementation! This is what you all have been waiting for! When official

approval or a decision has been made by whatever mechanism is typical for your organization, share that quickly with your authors. They'll want to know. They'll also want to provide assistance in turning the concept into reality.

Are you asking yourself, "Sounds good but does it *really* work?" Yes, it does. Groups average 6-8 weeks from start to finish. Two federal agencies, one state agency, and two non-profits organizations in Oregon have successfully incorporated the program snapshot process into their strategic planning cycle.