

How Nonprofits Can Improve Planning Session Participation

By Hardy Smith

Effective planning is critical to any nonprofit's success. Participation by advisers and decision makers in planning sessions for activities such as mapping out annual action plans, organizing major events, formulating budgets, and development of strategic plans should be a priority.

However, despite the fact that they recognize this, many organizations report low attendance by those who should be present is the frequent reality and this problem increases when volunteers are involved.

If you struggle with participation challenges for planning activities, here are **nine tips** to help make your nonprofit planning sessions successful:

- 1. Involve others** in the organization of the planning session. Those involved will generate good creative ideas for an effective session and their advance participation produces buy-in for the process and support for the plans that are produced. This expanded involvement also makes an exercise of “planning the planning session” that greatly increases the degree of success you will enjoy.
- 2. Don't repeat mistakes of the past.** There is a reason that previous attempts to secure needed participation have not been successful. Take time to understand why and be honest with your assessment. Seek out opinions from past participants, and those who should have been attending but haven't, and use that feedback to make needed corrections.
 - Could past sessions be seen as a waste of time?
 - Were potential participants given appropriate notice?
 - Was the planning activity itself planned, organized, and conducted with a sense of purpose?
 - Was time allocated used effectively and efficiently?
 - Was discussion dominated by a single person or just a few individuals?
 - Were opinions elicited from those who were present but quiet?
 - Are those who may have different or opposing viewpoints made to feel their opinions are welcomed?
 - Did participants leave with a sense of accomplishment?

- Were participants recognized for their contributions to the organization's planning efforts?
- Was follow-up action taken on strategies that were developed?

3. Set participation goals. Identify who *should be present* if your session is to be a success. If your attendance targets are volunteer board members, set a percentage goal of the board that must be reached, and make every effort possible to meet it.

Communicate individually to let people know how much their participation is needed and how much their insight is valued. Ask for a personal commitment for attendance. Don't accept "will try, plan to, or should be able to" as solid answers. You should know exactly who will attend prior to your activity. If you can't confirm committed presence in advance, then chances are good you won't get your needed involvement. Send out reminder notes to help ensure your attendance.

Confirm the significance of participation with personal messages from the organization's top leader. If your session involves volunteers, it's a nice ego stroke. If it involves staff, it's hard to turn down the boss!

4. Avoid schedule conflicts. Schedule planning activity far enough in advance to avoid potential scheduling conflicts. Sounds like a no-brainer but sometimes the organization already has other activities planned, important deadlines are approaching, or it's a heavy vacation period. Get schedule availability input from desired participants and set your date when most are available. Even better – set your activity on a regular recurring schedule.

Make sure you don't cause scheduling conflicts because you have waited until a deadline is looming to conduct a planning exercise. If the person in charge doesn't show he or she is taking this important activity seriously, how can other needed participants be expected to do so? Creating an unnecessary crisis that could have been avoided takes away credibility from both the process and its leader.

If someone would like to participate but just cannot attend the session, consider asking that person to submit ideas and suggestions which can be shared with the rest of the planning team.

- 5. Establish expected outcomes.** Have a specific purpose for your session. Communicate in advance the intended result, for example, will three new strategies for recruiting volunteers or members. Your participants will be able to come in with ideas already formulated. Identifying an expected outcome will also help keep the session focused on the primary task at hand.
- 6. Make sure participants are prepared.** Your planning team should know exactly what is expected of them. It's difficult to offer qualified opinion when given a thick folder of financials, project proposals, and operational details without the opportunity to review materials prior to the time when discussion is required. Help them be prepared with advance information.
- 7. Determine what format works best for your group.** Take into account the personalities involved. Use a meeting format that gets desired results and creates a positive experience so people are motivated to participate in future sessions.
 - Do you need teambuilding or fun activities?
 - Will your team react more favorably to a strictly all business session?
 - What is most productive length of time?
 - Will you get best results by getting away from the office and working in a retreat setting, or will a few hours in an office conference room be okay?
- 8. Have a designated facilitator.** Having someone with the ability to get everyone engaged and keep the process moving and focused is critical for creating the successful planning session you want.

Judge whether or not someone outside your organization is needed. An outside facilitator is often more effective at challenging, encouraging, drawing out opinions, and controlling discussion so it stays on a positive productive track.

Advance preparation time with your facilitator is important. The facilitator should do the necessary homework to be knowledgeable about the organization, be familiar with the backgrounds of the participants, and know the expected outcome. There should be a predetermined structure designed to maximize the activity.

9. Don't forget your post-event follow up. Send personal thank you notes that mention specific contributions made and solicit feed back for future sessions. Send out a summary of the planning session along with a copy of any final documents that are produced Give regular progress reports on implementation of the plans that were developed.

Achieving significant participation in your organization's planning sessions inspires *the* fundamental buy-in for implementing the action items in any plans that are produced.

Create within your organization the realization of the vital importance of planning activities by executing these tips and you are much more likely to have a higher level of preparation, participation, and enthusiasm in your planning sessions.

(As a speaker and consultant, Hardy Smith helps nonprofit organizations achieve high performance success. Leading publications such as GuideStar, BoardSource, Nonprofit Business Advisor, and Canadian Fundraising & Philanthropy have featured his work on how to create more effective nonprofit boards. Learn more about his ability to make a difference for your organization by visiting: www.hardysmith.com)