



INSTITUTE
FOR CONSERVATION
LEADERSHIP

The NETWORK

STRENGTHENING ORGANIZATIONS THAT PROTECT OUR EARTH  SPRING 2008

One Size Doesn't Fit All: Finding a Planning Process Suited to Your Organization

Most leaders and activists know that planning is essential to running a good organization, an effective campaign, or even a successful short-term project. As Yogi Berra once said, "If you don't know where you are going, you might wind up somewhere else."

For most of us, though, finding the time to plan well in the face of pressing issues is a challenge. And each of us has a personal orientation to planning that either makes us roll up our sleeves and delight in the discussion over goals and strategies...or roll our eyes and groan because we'd rather just jump in and get the work done. The opportunity then for most organizations is to figure out what type of planning will be most useful given limited time and resources.

Options for Planning

Planning can be divided into two categories—incremental and strategic.

Incremental planning is continuing already established programs or activities underway. It is usually associated with a specific timeframe. Incremental planning includes:

- Program or project plans
- Annual work plans (organizational and personal)
- Campaign plans

Planning strategically incorporates a wider range of information to help determine a new direction or goals. The information might include community or constituency needs, financial resources, a changing political climate, or some other event that has a significant impact on the environment in which your organization works. Planning strategically typically includes:

- Visioning
- Strategic planning
- Business planning

Planning strategically identifies priorities that are central to your organization's mission and responsive to the environment. It requires building commitment among board members, staff, and key constituencies or members.

Choosing the Right One for Your Organization

At ICL we receive many requests for strategic planning. In some cases, it is from organizations that have a history of planning and they want to begin another cycle of planning. Some are considering a shift in how they accomplish their mission, such as a land trust that wants to engage in advocacy work. For others, they want to retool their mission and vision because circumstances have changed and they see a new role for the organization.

We also hear from many smaller organizations, or groups that are rela-

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Programming You Can Count On

Over the Institute for Conservation Leadership's history, the demand for our brand of programming has increased. In response to that demand, in 2006, ICL began testing national offerings of our Signature Intensive Programs. The tests worked!

"In the past, we offered these programs episodically, and on a regional basis," notes Darren Phelps, ICL's Director of Programs. "We also depended on significant foundation monies to underwrite the program costs."

Looking toward the future, Darren notes new opportunities. "We want leaders and groups to depend on ICL to provide our Signature Intensive Programs on a regular basis. We think they deserve regular opportunities they can plan into their calendars and budgets. ICL's programming can be accessed as a key part of leaders using capacity building to strengthen their work." *continued on page 3*

ICL Supports the Schuylkill Learning Community

Imagine the challenge for communities working to protect a river that spans diverse landscapes – from the headwaters in mining lands of Pennsylvania's mountains, to farmland, to forested hills and historic sites, to countryside, to intense suburban development, to urban Philadelphia, to industrialized estuary. This is the promise and the challenge of protecting the Schuylkill River. Over the last three years, ICL has been engaged in an exciting venture to support this river's protection – the Schuylkill Learning Community.

ICL's work with the Schuylkill Learning Community has aimed to facilitate and improve collaboration, communication, and project/organizational capacity in the Schuylkill River Watershed. This evolving project has engaged 18-22 leaders who are grantees within the William Penn Foundation's Schuylkill River Watershed Cluster.

Although leaders in the Schuylkill Learning Community admit to some skepticism in the beginning, over time participants note many valuable benefits to them.

By listening to the participants' needs, ICL carefully designed activities to support the outcomes of supporting cooperative work,

enhancing communication, learning about the

diverse watershed, exploring leadership approaches, and delving into policy opportunities.

Activities to support these outcomes have included three meetings per year,

tours and site visits,

coaching and consulting, distance learning calls and webinars, and informal gatherings at participants' homes.

For more information about the Schuylkill Learning Community, contact Dianne Russell at dianne@icl.org.

"We have been having a truly collaborative, watershed-wide experience. The strengths of the learning community are difficult to quantify, but the experience has been invaluable!"

—A Schuylkill Learning Community Participant



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The Institute for Conservation Leadership strengthens leaders, organizations and networks that protect the Earth. We offer public programs and custom-designed services, including consulting, training, research and meeting facilitation.

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Address or Name Changes

Please help us keep our records up to date.
Email your changes to icl@icl.org.

One Size Doesn't Fit All

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tively new to planning. They may have some project or campaign plans but don't have the time and financial resources available to invest in strategic planning. To help set them up for a successful strategic planning process, we often suggest that they create an 18 to 24 month plan that focuses their work, allows them to highlight successes during that period of time, and gets all the internal pieces in place for them to do a more thorough strategic plan later.

Below is a list of circumstances to help you identify your organization's needs and an appropriate planning process for your organization:

Scenarios	Suggested Planning Process
- Your organization has individual programs or campaigns without one unified budget that includes administrative costs. - You want to increase board and staff involvement in fundraising. - The fundraising plan is not linked to your organizational budget.	Budget planning and/or fundraising planning
- Staff members are uncertain of the organization's long-term goals and how their work supports those goals. - Staff members are unsure of how to allocate their time for different projects or tasks. - You want clear goals by which to measure performance for the staff or board.	Annual planning and/or work plans
- The situation inside or outside the organization has changed significantly. - The organization's programs have grown and proliferated and it's not clear how they hold together to support your mission. - You want to build a shared understanding and commitment to the organization's mission and identify priorities.	Strategic planning
- The organization lacks a clear identity and set of core values. - The organization has not been able to excite or maintain its constituency over time. - The organization is facing a key leadership transition and seeks to clarify its leadership goals and needs to inform the hiring process. - The organization has seen a major increase or decrease in funding and wants to clarify its role and purpose in the wider sector.	Strategic visioning
- You want to offer a new product or service, or expand your products and services. - The organization wants to begin a fee-for-service venture. - The organization's products and services have increased and you must improve the management of those products and services.	Business planning

As you grow your organization, it is important to learn ways of integrating all types of planning into a framework that is efficient and serves the organization so you accomplish your goals. Tracking and monitoring is an important part of that process. By doing so, you can assess your progress, celebrate your accomplishments, and learn from your mistakes and successes.

ICL Programs Work!

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Now leaders can count on ICL's regular calendar of Signature Intensive Programs. All programs have an application process, begin with a multi-day workshop, and then continue with a 5-12 month schedule of coaching and consulting, peer support, distance learning, and additional workshops. The annual calendar includes:

Sustainable Organizations Program – begins late fall

Leading From Within – begins late fall

Complete Fundraiser Program – begins late winter/early spring

Executive Director Leadership Program – begins in spring

Visit ICL's website (www.icl.org) for information about current offerings or contact Darren Phelps at darren@icl.org.

Welcome Quentin Samuels



Quentin L. Samuels joined ICL's eastern office as a Program Coordinator in July 2007. He works on ICL's marketing, recruitment, workshop event management, and program evaluation efforts. Quentin brings valuable experience in marketing and program development from his previous work as a Community Development Specialist for Riverside Hospital. He enjoys working at ICL and says, "ICL allows me to offer input and share my insights on the work we do including program development, marketing, and strategic planning." Quentin lives in Maryland where he is active in community and church activities.

NEWS FROM THE INSTITUTE

ICL is grateful to our many 2007 contributors. Your generous support sustains our work to strengthen leaders, organizations, and networks that protect the Earth. Thank you!

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ICL Welcomes New Board Members –

In the last year, ICL has benefited from the considerable talent and expertise of four new board members:

Vivian Buckingham, *Director of Earth Day Network's Campaign for Communities*. Previously, Vivian worked with the Environmental Law Institute, the United Nations World Intellectual Property Organization (WIPO), the International Program of EarthJustice, and the Center for International Environmental Law in Geneva, Switzerland.

Suellen Keiner, *Chief Operating Officer of a new nonprofit organization, The State of the USA*. In 35 years as an environmental and civil rights lawyer, Suellen has worked with the National Academy of Public Administration, Environmental Law Institute, and as deputy assistant secretary for Energy and Minerals with the U.S. Department of the Interior.

Mark Johnston, *Executive Director of Camp McDowell*, an environmental camp and conference center for the Episcopal Church. An ordained priest in the Episcopal Church, Mark actively participates in the Alabama environmental community and currently serves on the boards of the Alabama Environmental Council and the Alabama Rivers Alliance.

Deborah Sliter, *Vice President for Programs, National Environmental Education Foundation*. Deborah manages programs that educate key professionals. She brings experience in public-private partnerships and program development from past efforts with Renew America, Citizen Action, the Democratic National Committee, and as Chief of Staff to Senator John Kerry.

We are grateful for each of their contributions to support and strengthen ICL's work.

UPCOMING EVENTS

The following list highlights upcoming ICL events and programs. Please visit www.icl.org for more information.

Sustainable Organizations: Building Shared Leadership for Change

This program helps leadership teams build effective organizations in a changing world, engage people with diverse perspectives and create strategic impact. Teams of three board members and staff will strengthen their ability to lead, assess, plan and implement successful organizational growth and transitions.

When and Where: The 3-day workshop will be held November 16-19, 2008 at the Maumee Bay Resort and Conference Center on Lake Erie in Oregon, OH (near Toledo)

Contact: Barbara Rusmore at barbara@icl.org

Leading From Within

Leading From Within is a five-month program that helps participants to have a greater impact as a leader. The program includes two 3-day workshops with conference calls and coaching time between sessions as

well as a 360-degree leadership assessment tool and peer exchange.

When and Where: The workshops will be held in November 2008 and March 2009 in the Mid-Atlantic Region

Contact: Peter Lane at peter@icl.org

Board JumpStart

This two-hour online workshop is designed for organizational teams of two to four board leaders (and the executive director, if you have one) to map out the path to a stronger board. Your team can participate from your office, via conference call and a web connection. Participating teams also receive an hour of follow-up consulting support.

Friday, April 18, 2008
2:00pm – 4:00pm (ET)

-OR-

Friday, June 27, 2008
3:00pm – 5:00pm (ET)

Contact: Peter Lane at peter@icl.org

RESOURCES

Recent books for activists and community organizers

Changing Course: *Windcall and the Art of Renewal*

by Susan Wells, Heyday Books, 2007.

This book tells the story of the Windcall Resident Program for activists and organizers seeking renewal. Incorporating the residents' personal reflections, the book serves as a guide to the causes of burnout and its reversal.

We Make Change: *Community Organizers Talk About What They Do – and Why*

by Kristin Layng Szakos and Joe Szakos, Vanderbilt University Press, 2007.

Profiling a diverse group of community organizers from across the country, this book serves as a resource for organizers and aspiring organizers.

ASK THE INSTITUTE

Effective facilitation makes meetings more successful. There are times when it's appropriate to facilitate a group that you're a part of, and times when the group would benefit from an outside facilitator. An outside facilitator focuses on process (how the meeting takes place and how people interact with one another) and content (the information or discussion needed to help a group meet the goals of the meeting). Having a facilitator provides an objective presence if there is a difference of opinion or conflict. The facilitator also allows you to participate fully without distraction.

Articulating the desired outcomes of your meeting and knowing who needs to participate will help you determine whether an outside facilitator is appropriate. Here are some suggestions for when it is beneficial to have an outside facilitator:

- Your desired outcomes are more complicated than simply sharing information.
- Your desired outcomes involve synthesizing and analyzing lots of information.
- Meeting participants have different backgrounds or specific expertise, and don't know each other.
- Meeting participants hold strong opinions or already have developed specific positions regarding decisions.

When should I use an outside facilitator versus facilitating a meeting myself?

- There is an identified conflict of opinion.
- You want to make sure that everyone at the meeting contributes.
- Not everyone perceives you or the leadership to be objective.

If you decide to utilize an outside facilitator, it is important to make sure that all the meeting participants have agreed to do so. You should also discuss the group's expectations of the facilitator with him or her, and allow that person to take a lead role in developing meeting goals and the agenda with you.

If the conditions above do not apply and you prefer to facilitate the meeting yourself, then consider the following suggestions:

- Gather input ahead of time on the goals, expectations, and agenda
- In planning the agenda, note items that are for reporting information versus those that need discussion, decision-making, and/or action
- Invite participation from all of the attendees

For more information on meeting facilitation options and tools, contact Peter Lane at peter@icl.org.



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