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Karner Blue butterfly, Necedah NWR, Wisconsin

Planning

On planning

As you begin, your group will likely start with a short-term action plan – focus on a few small achievable goals. This will allow growth, development of ideas, and give those ideas some time to evolve. While you'll have visions of accomplishing great things, you'll have to make hard decisions about where to focus your energies. This is where planning comes in.

Planning is a process which is too important to be left to chance. Most successful groups spend time wisely in their planning. If you can afford to, it will help your group immeasurably to hire a consultant to facilitate this process.

“Involve the full board in deciding attainable goals and the best methods for achieving them. The basic rule is to involve the group in identifying attainable goals and agreeing to stick to them tenaciously.”

– Brian O’Connell,
The Board Member’s Book

Plan to succeed

- *Develop short-term and long-term goals. Balance both thinking big and being realistic*
- *Take on projects that force the group to stretch themselves to be successful*
- *Decide what type of activities to pursue. Should it be education, visitors’ facilities, habitat protection, or something else?*
- *Look for new ways to do old business. Be creative.*
- *Become aware of obstacles. Develop plans to overcome them.*
- *Early on, focus on the natural resource, not on the politics.*
- *Ask why. Ask why not...*

In planning it is useful to think about potential products you will end up with. The following list was adapted from *A Nonprofit Organization Operating Manual* by Arnold J. and Philip R. Olenick.)

■ **Mission statement** – who and what you are.

■ **Vision statement** – what “business” you are in, what you plan to do, and what kind of organization you will need to do it.

■ **Strategic plan** – what you will accomplish in 3-5 years.

■ **Annual plan** – what you will accomplish this year.

■ **Human Resource plan** – how you will organize your volunteers.

■ **Logistics** – What you need, where and when and what resources to carry out plans.

■ **Funds and other donated resources** – What you need to pay for human resources, and to pay for logistical needs.

■ **Sources and types of funding** – fees, grants, endowments, in-kind contributions, borrowing, etc.

■ **Work plans** – projects and other tasks planned for the coming year with timelines.

■ **Organizational issues** – board, staff, and volunteer roles and relationships beyond provisions of the bylaws.

■ **Marketing and public relations** – getting your message across to the public, funding sources, writing grants, fundraising, marketing and public relations.

Set short-term and long-term goals, and deadlines

- Do a needs assessment*
Brainstorm ideas.
- Establish priorities and order them*
- Define roles and responsibilities of group members*
- Do a reality check*
What is possible to accomplish given your resources?
Set goals that are achievable given your resources.
- Develop programs and goals in line with your mission and with the missions of the refuge and refuge system.*

Tools for Planning

In your first year, you are going to want to say that you've accomplished something. What will that something be? In the beginning, it may be possible to only accomplish three to five new things each year.

Methods to identify planning tactics or objectives:

- List actions needed to achieve the goal; staff, concept plan, maps, funds, media.
- Match people with the tasks, define roles and responsibilities.
- Do a needs assessment.
- Establish priorities.
- Do a reality check.
- Plan your five W's for implementation, ask: who, what, when, where, and why.

Tips for achieving agreement, concurrence or buy-in for your plans:

- Meet with membership, management, and staff.
- Write a Memorandum of Understanding (MOU) between Friends and Refuge.
- Build support with facts and attention to details.
- Be prepared to defend and to sell your plan.
- Think through who the opposition is and what they may say. Know your supporters and opponents.

Define responsibilities to achieve each task – match people with tasks.

- Ask for volunteers.
- Determine whether paid employees would be best for certain duties.
- Use other groups. Engage other organizations.
- Again make use of the five W's.

Establish deadlines and procedures for follow-up.

- Make deadlines realistic and be flexible to accommodate constraints and unforeseen circumstances.
- Check in on progress often.
- If no deadlines are set, then it never gets done.

Document what you did.

- Keep a written history or chronicle of each project to learn from what was done.

Revisit your plan every year.

- Planning is a process, not an event.
- Schedule a time to do planning (at least every year).

Evaluate the outcomes of the project and consider what went well and ways to improve.

Words of Wisdom From Other Friends Groups

“

Dare to dream big dreams.

~

Plan for small successes and celebrate them.

~

Don't expect immediate results.

~

Respect each volunteer's time.

~

Look for big successes over time.

~

It is not easy. There will be ups and downs and you may have short-term failures. **DO NOT GIVE UP!**

~

Always say “Please” and “Thank you.”

The devil is in the details.

~

Remember that it is 5% inspiration and 95% perspiration.

~

Don't sweat the small stuff.

~

Get out and enjoy the refuge!

”

Planning Checklist

Planning is too important to leave to chance. If possible, get a facilitator to help you with this process.	
Involve the entire board in planning to achieve buy-in.	
Brainstorm ideas for both short term and long term goals. Order these and establish priorities.	
Don't try to do it all at once. Begin by accomplishing what you can in the short term, while thinking ahead to the future.	
Keep your mission in mind in all stages of planning.	
Analyze, document what you did to help with future planning.	
Revisit your plans regularly. Be willing to adapt or change them.	
Establish responsibilities to achieve each task, with deadlines and procedures for follow-up on all projects.	
Remember, your focus is the resource.	

