

## **Building Community Organizations (BCO) Initiative**

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**The Initiative:** Strategic planning and leadership development with a Not for Profit Board

**The Client Organization:** The BC Art Therapy Association

The BC Art Therapy Association is celebrating its 25<sup>th</sup> year as a professional association. Its membership is approximately 135, with a board of 8. The board is supported with non-elected members taking on specific responsibilities and tasks. The Association has one paid staff (10 hrs. per month), and operates without an office.

Between November 2004 and March 2005, we worked with the BC Art Therapy Association to develop the strategic planning capability of its board (contact: Debora Broadhurst, President of Board).

For this project, we chose Alan Paulson's seven-step process consulting model of entry, contracting, data collection, interpretation, action planning, implementing and evaluation. The culmination of the project was the facilitation of a strategic planning day.

**Entry and contracting stage:** A planning meeting kicked off the project with the association's president and vice-president. A needs assessment was conducted to identify the issues and establish roles and responsibilities, project outcomes and success indicators. This was refined into a working contract that defined two key objectives of the project:

1. Clarify the vision and goals of the association and facilitate the development of a plan for achieving these goals.
2. Model a strategic planning process that board leaders could replicate in the future.

**Data Collection:** To prepare for the planning day, individual interviews were held with all 8 board members, 3 executive non-members and one paid very part-time staff person. Participants were asked to share their vision and goals for the association, their thoughts on the needs of the board to achieve these goals and their personal time commitment to the association.

**Interpretation:** The information was analyzed for themes and trends. It indicated general consensus regarding the goals of the association, however there were divergent opinions as to what its overall vision should be.

**Action Planning:** Prior to the planning day, a brief presentation was made to the board, in order to explain strategic and operational planning and the role of board members as leaders in this process. We also provided some positive feedback from the initial data-gathering phase.

The determined goal of the planning day was to establish a plan for the upcoming year while modelling a formal planning process. We also perceived that an outcome of the day would be an integrated team experience.

### **Outline for the Planning Day**

We opened the day with a “fish bowl” approach to outline our vision of the day and invite the Board members into our conversation. To establish a shared vision, a group collage was built and themed with key words. To support this themed vision and to provide feedback from the collected and analyzed data from the interviews, three main goals were scripted and presented to the group for feedback and refinement. The group then brainstormed activities into themes that would support the completion of each of these goals.

### **Implementation and Evaluation**

These two stages of the consultancy process were not part of the contract with the Association, however, as part of the planning day wrap up, the group was briefed on the importance of identifying a champion to follow through on actions. A list of activities that would generate quick wins was developed and undertaken by the group. Finally, the planning process was debriefed and participants were given a handout outlining the key steps in the process. The feedback received from the participants and president was extremely positive.

### **What we learned from the project**

We learned the basic consulting model, building a contract with the project champion, being flexible and specific in the timing of the project, and how to motivate a “tired” board to lead as well as manage. We learned how to take initial information from the project champion and formulate questions for the interview process, and to reformat the questions while in the interview process. We learned how to create a planning day that had enough structure and flexibility to be able to meet the specific needs of the Board as they arose on the planning day. We learned how to look at data that was not what we expected and analyze it to form a picture that was both understandable to the Board, and useful to them to support their planning process. We learned how to facilitate the Board being able to identify the information that relates to actualizing their vision through Priorities, Activities, and Tasks. We learned how to support openness and participation within the group that encouraged a movement towards shared leadership. We learned how to set a clear completion point.

### **What could be changed or improved on the next project**

We could have clarified the questions for the interviews, possibly used the jargon that they used to increase their understanding of the questions.

We could have provided the entire board with a formal agreement about the results of the data collected. As it was, we only provided that to the project sponsor (E.D.)

We could have involved the Board more in the actually planning of the day, gathered more of their input; possibly tested the waters with them regarding their availability and willingness to co-create the day together. (They had expressed feelings of being overwhelmed with activities, so we did not invite them).