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Should the board chairperson facilitate strategic planning?

By John M. Fulwider, Ph.D.

A board I lead last wrote a strategic plan in 2003, and several members think (rightly) we should get moving on updating our strategy, given we’re, oh, two and a third three-year planning cycles overdue. (Say that three times fast.) So several board members have asked me, the chairperson who’s conveniently also a consultant, to design and facilitate a strategic planning process. This gives me an excuse to pose the question: Should the board chairperson facilitate strategic planning?

No. The board chairperson should not facilitate strategic planning because doing so:

- Cheats the board;
- Hurts the organization; and
- Silences the chairperson.

Planning facilitated by the board chairperson seems at first glance a good idea. It’s free. It’s fast. It’s facile. (You can see I was stretching for the alliteration with that last word.) It’s all those things because you don’t have to find and interview a consultant—which, I’ll admit, is no small task. But when you take the fast, free, and facile route, you get a bargain that’s nothing of the sort because you’ve failed to invest in your organization. Specifically, you have:

Cheated the board by denying them a truly inclusive pre-planning process. One of [BoardSource’s six qualities of a successful retreat](#) (.pdf link) is complete inclusion of every board member’s views from the very start—while the planning process itself is being designed. On even the healthiest board there is an inherent power differential between the chairperson and the members that can prevent a member from being completely open with the chairperson about her or his desires for the organization, and indeed for the planning process. The most

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obvious example is when a member or two thinks the chairperson needs to change in some way. That sort of input won’t make it out of every board member’s lips. An outsider, by contrast, can act as an equal partner with each board member to draw out and hear each member’s true views, then design a process that maximally includes each member’s input. (You can [read more here](#) about how starting with an investment in inclusion yields success all the way through implementation.)

Taking the fast, free, and facile route also can **hurt the organization**. If the chairperson is not a broadly educated specialist in strategic planning, she or he could take the one approach familiar to her or him, which may not be the best for that organization’s unique needs. The right outsider would choose from among the many excellent general approaches to strategic planning and then customize one to the organization. The process does matter, and if the board puts its limited strategic thinking resources in the wrong process, the output will be a suboptimal strategic plan. And that hurts the organization. (Note I did not say the process is everything; the secret sauce of strategic planning takes quality ingredients, not just a recipe. And no, one of those ingredients is not [mayonnaise left out in the sun](#).)

Finally, the board chairperson should forget the free, fast, and facile route because it **silences the chairperson**. It’s supremely difficult for the chairperson to facilitate a full and fair airing of everyone’s ideas when she or he has smart and strongly held ideas of her or his own. That’s unfair to the chairperson, unfair to the board (which could [develop better ideas](#) faster with another mind contributing), and unfair to the organization.

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