

# MARTA SIBERIO

## CONSULTING

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### TIPS FOR SUCCESSFUL STRATEGIC PLANNING

**Purpose: How do we get their "buy-in"?**

Whether Board or staff, go for authentic participation by first hosting "why I choose to serve/work here" conversations. Once re-connected to their purpose, your stakeholders are better able to see beyond today's problems and offer ideas from a new perspective.

**Decision-making: Who gets to decide?**

The answer depends on your organizational culture. The important thing is to be clear and up-front with staff and others about how their input will be used.

**Focus: Can a strategic plan actually increase our impact?**

Yes, if you subscribe to the "the rule of three" when setting priorities. Transformative work is more likely to occur when energies and talents focus on no more than three things at once.



Marta Siberio

**Dear Colleagues:**

I'd like to share some of the useful approaches that emerged from my recent strategic planning work with clients, as well as some readings and resources that have challenged my thinking.

Marta

### MY CURRENT PROJECTS

**Embracing Opportunities in Health Care**

Two current strategic planning clients are engaging their stakeholders in interesting ways to identify opportunities in the new healthcare landscape. In December, the Community Health Care Association of New York State will host a meeting of its entire membership (I will facilitate.) New York's 50 community health centers will begin to craft their membership organization's future *collectively*.

This fall, Planned Parenthood of NYC launched a *peer-learning process* for staff and Board to explore the critical internal and external issues influencing their strategy development. This intelligence will ground the Board's strategic planning retreat, which I will facilitate at the end of the October. The level of complexity and change facing the health care sector requires multiple ways of fostering meaningful dialogue to allow the best thinking possible to emerge. Both of these organizations are doing just that.

**Leading Change for the Independent Worker**

Right now, I am designing and will facilitate a strategic planning retreat for Freelancers Union (FU), an organization dedicated to the success of America's independent workers. In its first 10 years FU has grown to a membership of over 140,000, established its own health insurance company and offers a range of products and services to its members.

Grounded in the theories and practices of "social entrepreneurship," FU has demonstrated that self-sustaining *networks or communities* of individuals can be a powerful unit for addressing social needs and making social change. By *embracing* the realities of the 21<sup>st</sup> century (effective use of Web-based associations; creative alternatives to government and market solutions,) FU holds great promise as an organizational model for the future.

**Building Diversity and Inclusive Practices in Philanthropy**

The Council on Foundations' Career Pathways Program is a new philanthropic leadership preparation program aimed at increasing the pipeline of diverse talent in senior and executive positions in philanthropy, and building the capacity of the philanthropic sector to become more diverse, inclusive and effective. As a member of the project team, over the summer and this fall, I helped to develop the curriculum and served as the facilitator of three group learning sessions. An example of the challenges we have posed to these leaders is communicating the sense of purpose that drives them to lead in a compelling, concise "vision speech." Building leaders' *narrative intelligence* to engage others in helping them achieve their vision is one of the areas of current interest and focus in my leadership practice.

Marta Siberio  
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### Interesting Reading

The Networked Nonprofit, by Kanter and Fine, is an accessible how-to guide to social media that raises intriguing questions about new ways of working and the future relevance of certain types of organizations.

To read a review of this book, [click here](#).

"The Poverty Lab" by Ian Parker (The New Yorker, May 17, 2010) challenges notions about using randomized control experiments to evaluate complex social policy programs or initiatives.

I have begun to read blogs! Here is one I recommend: Lucy Bernholz' PHILANTHROPY 2173. Lucy ran a session at the Council on Foundations' Career Pathways Program and offered provocative ideas about the intersection of philanthropy and technology.