

Ethical Considerations In Strategic Planning

As a board member or senior manager of a non-profit you are responsible for creating and participating in the development of your organization's strategic direction and implementing the change associated with delivering upon that strategy.

While there are few ethical absolutes, the key ethical considerations in strategic planning include:

- Stakeholder participation.
- Organizational values.
- Individual values.
- Managing change.

Stakeholder Participation

When undertaking the process of strategy development we are often focused on determining the most effective way of developing the plan. This often results in the process consisting of a task force of the Board being given the mandate of developing a plan and submitting it to the Board for review and approval.

It is well documented that any significant change in strategy has a corresponding change in the structure of the organization in order to effectively deliver upon that strategy. As such, we should be comfortable that the selected strategy is the right one for the organization at that particular point in time. But how do you know if you have developed the right strategy? The first thing is to appreciate that there is no one right strategy for any organization at any particular point in time. Having said that, you can improve your chances of getting the "appropriate strategy" by involving stakeholders.

Stakeholder involvement challenges your existing paradigms, allows differing perspectives and enhances support. All of these help improve the chance that your organization's strategy is developed with the information necessary to make decisions. Stakeholder participation is the first acid test.

Organizational Values

One of the key advantages most non-profits have over their corporate counterparts is their development of a set of organizational values. Organizational values are those key statements that help guide the way an organization pursues its objectives and delivers upon its mission.

If your organization doesn't have a set of organizational values you should at least determine them as a part of your next strategy development session, if not before. For those organizations that have their values determined, it is important that as part of your next strategic planning process that you subject your strategy to those values. If there are any issues or concerns regarding how your strategy fits within those values then you need to reassess your strategy.

Your organizational strategy should be consistent and support your organization's values. Organizational values are the second acid test.

Individual Values

As senior managers or board members you carry a set of personal values. In order to be able to say that you support the strategic direction of the organization it is important that you can also say that the strategy is consistent with your personal values. Individual values are the third acid test.

Managing Change

As mentioned earlier, any significant change in strategy has a corresponding change in organizational structure. Managing this change can be done in many ways. Ensuring that the change is managed in a way that is consistent with the organization's values and your personal values is important. Additional questions that should be asked include:

- o Who will actually gain from this change?
- o Who won't gain from this change?
- o Is the change worth the risk?
- o How will we work with those affected by the change in order to assist them in making the transition?
- o How will we work with those that can't make the transition?

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