


## Principles and Practices of ORGANIZATIONAL PLANNING



Connecting Altitudes & Attitudes  
Western Slope Rural Philanthropy Days  
Delta Gunnison Hinsdale Mesa Montrose Ouray San Miguel

Western Slope Rural Philanthropy Days  
Follow-up Workshop

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

## Introductions

- Hello, my name is Brian!
  - Who am I?
  - What do I value?
  - What do I do?
  - Why am I here?
- Hello, my name is \_\_\_\_\_!

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

## Today's Agenda

- I. Introductions (20 Minutes)
- II. Planning Principles (20 Minutes)
- III. Principles Worksheet/Handout (20 Minutes)
- IV. Break (15 Minutes)
- V. Identifying Potholes and Roadblocks (30 Minutes)
- VI. Planning Practices Assessment (45 Minutes)
- VII. Action Plan Reports (20 Minutes)
- VIII. Wrap-up (10 Minutes)

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

## Organizational Planning

- “If you don’t know where you are going ...  
*HOW WILL YOU GET THERE?”*
- “If you do what you have always done...  
*YOU WILL GET WHAT YOU’VE ALWAYS GOTTEN.”*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

## Organizational Planning AN OVERVIEW



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

## Organizational Planning PRINCIPLES

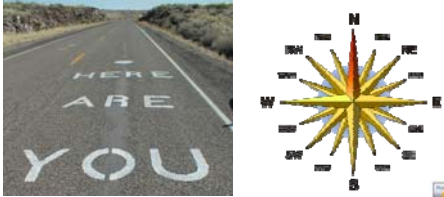
1. Organizational Planning is a **PROCESS.**



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

**Organizational Planning  
PRINCIPLES**

2. Organization Planning defines  
**OVERALL DIRECTION.**



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

**Organizational Planning  
PRINCIPLES**

3. Organizational planning describes  
**ACTIVITIES.**



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

**Organizational Planning  
PRINCIPLES**

4. Organizational Planning outlines  
**STRATEGIES.**



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

**Organizational Planning  
PRINCIPLES**


5. Organizational planning pursues  
**ESTABLISHED GOALS.**



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

**Organizational Planning  
PRINCIPLES**

6. Organizational planning utilizes  
**ESTABLISHED TIMELINES.**



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

**Organizational Planning  
PRINCIPLES**

7. Organizational planning involves intentionally  
obtaining ongoing  
**INPUT FROM CONSTITUENTS.**



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRINCIPLES

8. Organizational Planning uses all  
AVAILABLE RESOURCES.



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRINCIPLES CHECKLIST



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRINCIPLES CHECKLIST




SEE HANDOUT

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRINCIPLES FINAL OUTCOME


Fulfill Mission with more success.



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

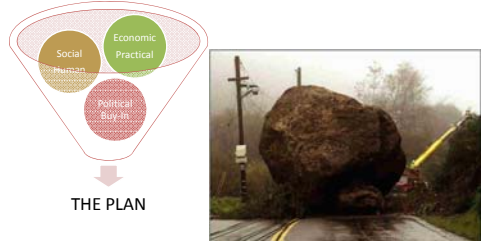
Organizational Planning  
PRINCIPLES

Remember that part about PROCESS?



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com




Organizational Planning  
POTHOLES AND ROADBLOCKS



THE PLAN

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com


Organizational Planning  
POLITICAL ROADBLOCKS



Lack of Consensus Building  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com



Organizational Planning  
POLITICAL ROADBLOCKS



Unclear Decision Making Protocol  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com




Organizational Planning  
POLITICAL ROADBLOCKS



Personal Visions and Planning  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
POLITICAL ROADBLOCKS



Weak Leadership  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
POLITICAL ROADBLOCKS



Too focused on Destination not  
Journey  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
POLITICAL ROADBLOCKS



Underestimate the Roadblocks  
Poor or Naive Strategies  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
POLITICAL ROADBLOCKS



Road to Aberdeen  
Problem of Agreement  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
SOCIAL ROADBLOCKS



Lack of Input from  
Constituents  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
SOCIAL ROADBLOCKS



Nay-sayers  
Complacency  
Inertia  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
SOCIAL ROADBLOCKS



Lack of Skill or Readiness  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
SOCIAL ROADBLOCKS



Unclear Goals  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
SOCIAL ROADBLOCKS



Ambiguous Roles and  
Responsibilities  
Unreal expectations  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com


Organizational Planning  
SOCIAL ROADBLOCKS



Lack of Trust  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRACTICAL ROADBLOCKS



Myth of Scarcity  
OR  
Actual Scarcity!  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRACTICAL ROADBLOCKS



No WCS Planning  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRACTICAL ROADBLOCKS



Too fast or Too slow  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRACTICAL ROADBLOCKS



Not Ready in General  
Timing  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRACTICAL ROADBLOCKS



Irrelevant Planning  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com


Organizational Planning  
PRACTICAL ROADBLOCKS



Running before Crawling  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRACTICAL ROADBLOCKS



Starting from Scratch  
*EXAMPLES*

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
PRACTICES



See "Planning Practices" Assessment Handout.


Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
ACTION PLAN

After utilizing the  
planning practices assessment tool  
what are the 3-5  
**PLANNING PRACTICE PRIORITIES**  
you identified for your organization?

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

Organizational Planning  
WRAP UP



Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

THANKS  
Keep Coming to these Trainings!



Connecting Altitudes & Attitudes  
Western Slope Rural Philanthropy Days  
Delta Gunnison Hinsdale Mesa Montrose Ouray San Miguel

Brian C. Krill / (970) 209-1006 / brian.krill@peakeducationconsulting.com

