

Community Benefit Planning – The Context

When we take time to look up from our work and set aside our mission, our strategic goals, our financials, and even our programs for just a moment, we have an opportunity to focus on what we hope all our hard work and organizational success will make possible for our communities. It is a chance to look beyond our walls and see how what we do aligns with what we would like our communities to be. When we start from this perspective, we can articulate what we believe is the highest potential for our communities and our work. This is the **community benefit** we want the work of the organization to advance and to which we will hold ourselves and our work accountable. The goal of Community Benefit Focused planning, is to better understand that highest potential goal (community benefit) and the conditions that need to be in place within the community to create the positive change we desire and to then identify the specific benefit(s) the organization makes possible to advance that community potential (vision and mission).

The Community Benefit Planning approach is best described by Hildy Gottlieb of Creating the Future as the following:

“Everything we do is creating the future of both our communities and our organizations. Through reverse engineering, Vision-Based [Community Benefit] Planning begins with the organization’s vision for the future of the community, and works backwards to determine the steps the group will begin taking immediately to create the favorable conditions that will create that future. This provides the organization with practical means for consciously creating the future they want, rather than perpetuating planning approaches that keep organizations and communities constantly reacting to circumstances”¹

In order to honor all the strengths in the community, this approach encourages looking beyond the boundaries of the organization and engaging the broader community, especially those whom the organization is intentionally working to benefit, to fully understand the array of conditions that need to be in place for successful community change. The organization identifies the conditions it is best positioned to influence and moves forward with organizational-level planning (strategy and structure). Planning is focused not on what the organization does and/or has done, but on what has the greatest potential to create the community change it wants to see, increasing the opportunity to see new options, to innovate, to partner, and/or to experiment.

Organizational Sustainability. Once we have identified how the organization will create benefit to the community, we then focus on the process of aligning the structure, resources, and efforts of the organization to ensure that they support effective execution of that strategy. The process engages members of the organization as well as members of the broader community in determining the structural model of the organization that is both viable and sustainable in order to create buy-in, validate the work, and develop meaningful accountability. The result is an organization that is intentionally aligned and organized to create the community change/benefit it envisions in a sustainable way (business model).

There is an intentional “ripple effect” built into the process. By engaging the community in conversations about what conditions are required to further benefits across the community, we are having a collective conversation about what we are all contributing to, energizing all those involved and reinforcing shared interests and passions. Each participant in this conversation can take away a piece of that vision and explore how they can contribute to overall community success given their focus and expertise. In this way, the planning of our work not only benefits us, but also benefits the planning of everyone involved - strengthening the relationships, partnerships, and collaborative potential across the community.

Community Benefit Planning – The Process²

Introduction and Preparation

Determining objectives, creating buy-in, and setting expectations

- Why:** Engagements have the greatest potential for success when people know what to expect from the process. This means understanding the desired objectives and outcomes of those involved and ensuring that people understand what the process entails. It is also important to establish fit between the facilitator and the group.
- How:** Time is dedicated to allow board members and senior leaders to communicate their expectations, learn about the approach to planning, share what a successful engagement would mean (for them, the organization, and the community), and to ask questions.
- What:** This kick-off phase generally includes a time for the facilitator to meet the whole Board and/or senior leaders as well as individual telephone conversations with board members and other key participants in the process to discuss expectations, the approach, and to answer any questions.

Clarifying Desired Community Benefit and Approach to Creating Change

Determining the community benefit (impact) we will hold ourselves accountable for achieving and developing the specific approach (strategy) and norms (values) needed to make this achievement possible

- Why:** Recognizing that we come to any planning process with a desire to assess and potentially change our work, it is important to clearly understand the context within which we are working and, most importantly, what the ultimate goal is that we are trying to achieve. In finding the answer to what it is that we hope all our work is making possible for the community, we provide clear criteria to guide our planning and decision making as we identify the concrete steps we will take.
- How:** Time is dedicated to explore, articulate, and agree upon the type of community we want our work to contribute to (our shared vision), the behaviors/values which will guide our decisions and interactions as we do our work, and the specific approach we will take in creating conditions that support our vision of the community (mission).
- What:** Process-oriented workshop(s)/meeting(s) with board members, staff, and/or community stakeholders (invited at the discretion of the organization) that focuses participants' attention on defining their community-oriented aspirations for the organization and the values that are critical to successfully support achieving that vision.

The process moves on to **identifying the cause-and-effect conditions** needed to bring about the community we envision, including activities aimed at defining what it would take to build the community we want. The heart of this work is a reverse-engineering technique that will illuminate the key priorities and critical steps involved in reaching an organizations' goal and the specific niche/area of focus the organization will pursue.

Connecting Our Community Benefit Approach to Our Work as an Organization

Identifying clear expectations and actionable steps (tactics) that will make implementation of the approach identified above possible

Why: There should be no leaps of faith from *our approach* to *the reality of getting the work done*. To make the approach achievable and successful, planning must connect the outcomes with the actions required so that everyone understands what it takes to accomplish what we want to see made possible for our communities and the organizations we serve. This important work will result in a planned approach to achieving success.

How: By applying several different lens to the cause-and-effect conditions for success embodied in our approach, we will unpack what actions we must take to make these conditions a reality.

What: Time is dedicated to evaluating the approach and key conditions for success through the following lens (note: the process is organic and multiple lens may be explored simultaneously as the planning process unfolds)

Measuring Success: Determine what indicators can be employed to measure how well the organizations' work is creating the desired community benefit - positively influencing the cause-and-effect conditions embodied in our approach.

Vision & Values-based Goals/Objectives: Determine what the actual work and outcomes will look like in the short and medium term in order to create the community benefit you wish to see in your community. Examine how the goals/objectives line up with the values that the organization wishes to model for the community.

Alignment of Existing Work: Determine how the existing work of the organization aligns with the cause-and-effect conditions (strategy) and the core values that have been articulated as the means to achieving community benefit.

Gaining Knowledge: Consider and decide what information will need to be gathered/learned in order to successfully realize the goals/objectives decided upon.

Engaging Others: Consider steps for engaging community members in conversations and inquiry that honors the wisdom of the community (particularly those who benefit directly from our work and those whom we recognize as wise individuals) in order to make our efforts stronger.

Ensuring Organizational Efficacy and Sustainability

Creating a plan aimed at ensuring that your organization has everything it needs internally to accomplish its Vision.

Why: To be successful, programs, activities, services, and the people engaged in providing them rely on an organization that is viable, supportive, and sustainable. Ensuring that decisions about the operations of the organization are focused on making the approach to creating community benefit possible elevates organizational integrity and relevance. In this way, our work is defined specifically by what makes it possible for the organization to accomplish the work we have just mapped out rather than being proscribed roles, responsibilities, and structures based on what and organization "should" do.

How: By continuing the line of reverse engineering by drilling down into the cause-and-affect conditions that support organizational success, we will examine what conditions need to exist internally within

the organization to increase the potential success of the approach and community-benefit activity we have mapped out.

What: Time is dedicated to modelling and assessing the organization's business model, infrastructure, and people to ensure alignment with and support of successful execution of the organizations community benefit activity. Likely areas to consider in this phase include:

- Leadership Structure
- Program Scope and Structure
- Staff and Volunteers
- Facilities & Equipment
- Administration Systems
- Regulatory Issues
- Internal Communications
- Financial Systems & Planning
- Revenue Models
- Engagement with Existing Supporters
- Engagement with the Community at Large
- Cultural Competence
- Board Mechanics, Roles, Responsibilities
- And others that are pertinent to the organization

Continuous Planning

Monitoring progress on creating community-benefit and advancing your vision and adjusting as needed

Why: Plans are a static outcome of a planning process. The process is actually where the evaluation and answers emerge. Planning as an active process makes it possible to assess and readjust as necessary. This work is intended to make it possible for those who participate to continue to engage in this type of planning as an integrated part of the work they do.

How: With intentionality, we must structure our work with a planning process. Consider the questions that are most important in making sure that everyone understands the vision and approach of the organization; that work is being evaluated against the success it is intended to accomplish (at all levels of the organization); and that assumptions are revisited, adjusted, and re-reverse-engineered as needed (just go back and step through the planning process above).

What: From our analysis of internal strength, an organizational profile, an operational plan, policy documents, and a board calendar are just some of the tools that can be put into use to facilitate ongoing planning.

¹Hildy Gottlieb, Author of The Pollyanna Principles and founder of Creating the Future

²This work is deeply informed and draws language from work done by Gayle Valeriotte & Creating the Future