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Taking Program Snapshots: Planning Strategies When There Isn't Time for Strategic Planning

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PREVIOUS
ARTICLE



ISSUE
CONTENTS



NEXT
ARTICLE



Taking Program Snapshots: Planning Strategies When There Isn't Time for Strategic Planning

Abstract

Periodic strategic planning is critical to long-term program success. Taking program "snapshots" is a method that helps program teams make mid-course corrections within the strategic planning cycle. This much shorter process (6-8 weeks) is particularly effective for small program areas or project teams. Advantages are 1) the ability to obtain qualitative information quickly from clients, colleagues, and administration; 2) optimal working environments for planning by bringing people in to the process sequentially rather than concurrently; 3) a widening circle of people becoming champions of the program; and 4) its fast pace, generally 6-8 weeks from beginning to end.

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Introduction

Periodic strategic planning is critical to long-term program success. However, comprehensive strategic planning can be overwhelming--and costly in terms of human and fiscal resources. Here's a process shortcut--taking program "snapshots" -- designed to help program teams make mid-course corrections within the strategic planning cycle. This much shorter process (6-8 weeks) is particularly effective for small program areas or project teams.

The advantages of taking program snapshots are:

- You can obtain qualitative information quickly from clients, colleagues, and administration for use in program planning.
- It provides optimal working environments for planning by bringing people in to the process sequentially rather than concurrently.
- It allows a widening circle of people to become champions of the program before the solutions are finalized.
- It's fast! 6-8 weeks beginning to end.

Process

Step 1

Start with one person in charge--a temporarily assigned coordinator who takes responsibility for the process beginning to end. Enthusiasm and strong follow-up skills are key characteristics for the coordinator to have.

Step 2

The coordinator informally interviews colleagues, clients, and administrators affiliated with the program. She or he asks what they view as the strengths and the weaknesses of the current

program and what changes they'd like to see in the future. Perceptions, not quantifiable data, are the goal. Interviews can be in person, by phone, or by email.

Time involved: 3 days, counting waiting for call-backs and doing 10-20 interviews

Step 3

The coordinator drafts a short narrative report about what she or he heard. This report doesn't have to be fancy--it's not rocket science--so taking a long time to agonize over it won't help!

Time: Plan on a maximum of 1 day.

Step 4

The next step is to convene a small group of creative thinkers. The coordinator brings together five to eight people who love to explore new possibilities. Some of these people may be within same organization, and some may be from the outside. They are promised 1 day in a comfortable, non-intrusive environment, a day with minimal structure and maximum creativity, a day with no naysayers. They'll jump at the chance!

When the group's ready to start, the coordinator quickly shares the narrative report, identifies any "givens" (such as "must be implemented at the start of the fiscal year"), describes what outcomes they should achieve by the end of the day (such as "propose 2-4 workable models")--and then stand back! Besides having plenty of paper, pens, flipcharts, food, and beverages on hand, no facilitation of these creative thinkers is needed or desired. The coordinator's job at this point is to clarify any points and to make sure they have everything they need.

The creative thinkers will have a great time, bouncing ideas and grabbing pens to write on charts. The energy levels will stay incredibly high all day long. Several of them will exclaim, "This is what work is supposed to be like!" And yes, at the end of the day, they'll hand the coordinator the requested product.

Time involved: 1 day for five to eight people, plus 1 day of preparation by the coordinator.

Step 5

Now, reactors are invited in to . . . react. The next day (or as soon as possible), the creative thinkers will introduce their proposals to six to eight reactors, people skilled at listening and analyzing the feasibility of ideas. The reactors are told to "shoot holes" in the models and to "rip 'em apart"--which they'll do with great glee! These people's strength is in finding flaws; conversely, this means that they're also skilled at recognizing good ideas when they see them.

Quite quickly, without any prompting, they'll find themselves saying things like "Well, it won't work because you have A in here, but if you did B, you'd get the same results and avoid this pitfall." They'll begin to find creative solutions, tweaking here and there, but without changing the essence of the proposals.

Again, there's minimal interference from the coordinator. At the end of this day, several strong proposals will be on the table; names of the next people to bring in to the process will have been added; *and* 12-16 people have committed themselves to the ideas.

Time: 1 day of working, plus 1 day to prepare.

Step 6

Now, it's the coordinator's turn to synthesize the materials offered by the creators and reactors. Again, she or he drafts a working proposal document, making sure to include a short overview, the advantages and disadvantages of each of the proposals, estimated budget, and phase-in time. The names of the people who crafted the concepts are prominently displayed. The coordinator distributes the document the following day to appropriate decision makers and of course, to the people who put it together.

Maintaining forward momentum is vital! This document needs to be written within a day or two after the meetings. The quick turn-around time implies respect for the time and energy of the creative thinkers and reactors, and helps minimize rumors. And, in the next phase, as new insights and clarifications come pouring in, keep sharing that information.

Time: 1 day to write the synthesis.

Step 7

At this point, the coordinator identifies and approaches additional stakeholders. These people are generally those who would be implementing (field personnel) or supporting (office staff) or administering (program leaders) the proposed new program actions. Now's the time to bring them into the planning loop to minimize glitches, to develop understanding of what's being attempted, and to garner more champions for the ideas. Invariably, the additional stakeholders are very

willing to give good advice, especially before the proposals become reality.

Another advantage to moving quickly is that many of the creative thinkers and the reactors will informally talk about the proposals to anyone who will listen. Why? Because they found the process exciting, they have ownership, and they know the ideas are valid. The circle of people who have a stake and an enthusiasm for the concepts widens even more. In 2 weeks, an additional 50 people can easily be added to the list of "authors."

Time: 10 days, with 50 new people brought into the circle.

Step 8

Implementation! This is what everyone has been waiting for! When official approval or a decision has been made by whatever mechanism is typical for the organization, that information is quickly shared with the authors. Besides, wanting to know about developments, they'll also want to provide assistance in turning the concept into reality.

Total days: 19. Total people: 71-86.

Conclusion

Are you asking yourself, "Sounds good, but does it *really* work?" Yes, it does. Groups average 6-8 weeks from start to finish. Two federal agencies, one state agency, and two non-profits organizations in Oregon have successfully incorporated the program snapshot process into their strategic planning cycle.

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