

Research Summary

Responding to COVID-19: Planning Process Outcomes in Social-Service Nonprofits and Their Contribution to the Organizational Ability to Cope with Environmental Turbulence

Strategic planning remains an essential aspect of nonprofit governance, yet its value for the sector has not been properly established. Initially implemented based on donor demands, strategic planning is still perceived as a legitimacy requirement to access funding rather than a valuable tool in its own right, leaving nonprofits with the belief that its use in the sector is limited.

There are several reasons for this ambivalence towards strategic planning in the charitable organization. For one, the full array of outcomes and roles of strategic planning has not been systematically examined (Bryson et al., 2018). Apart from limited studies looking at the link between strategic planning and performance, there have been no attempts to determine the proximal, immediate outcomes of the planning process and what functions can they serve in these organizations (Stone et al., 1999; Bromley et al., 2012). Second, there is lack of understanding of what accounts for effective planning in nonprofits. While there are a multitude of best practices and recommendations, there are no empirical studies looking to identify the factors contributing to successful planning practice (Laurett & Ferreira, 2018). Third, despite the fact that nonprofits function in highly turbulent environments (King, 2008), there have been no attempts to explore how the current planning models can be adjusted to better fit the management of unstable settings (Morrison & Salipante, 2007; Paarlberg & Bielefeld, 2009).

Building on the above, my doctoral research asks the following questions: What are the immediate outcomes of strategic planning in nonprofits? How are these outcomes related to specific characteristics of the planning process? What is the value of these outcomes for the idiosyncratic governance needs of the sector and its ability to navigate turbulence? What makes for an effective nonprofit strategic planning model in unstable environments?

I approach these questions through a comparative holistic case study of six social-service organizations to establish the common characteristics and immediate outcomes of the strategic planning process, as well as the factors that influence its effectiveness. Furthermore, by selecting organizations that successfully navigated the COVID-19 crisis as an example of extreme turbulence, the study brings additional insight on effective strategic planning models for unstable environments. The case study design allows for the implementation of multiple research methods, including survey, semi-structured interviews and document analysis. Study participants have been recruited in collaboration with Imagine Canada and The United Way GT, giving further perspective for disseminating the findings.

This study will make several important contributions to the effective governance of nonprofit organizations. For one, it will raise the awareness of the variety of functional outcomes strategic planning brings to nonprofits, in an attempt to reaffirm its value as an important tool for survival and growth, beyond funder legitimacy. Two, the study will provide much needed empirical data on the relationship between the characteristics of the strategic planning process and its functional outcomes. Three, the findings will provide the basis for the development of a strategic planning model, specifically tailored to the needs of the sector and the unstable environment it operates in.

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