

## **The Unicorn Approach to Values-Based Strategic Planning**

Choice or safety and security? Freedom or integration? We might like to always have both, but sometimes our choices lead us to incompatible visions.

Over the past few years, I used the Unicorn Rescue Society as the main case study for my strategic planning workshops for Canadian Fundraiser and other organizations. I could be certain there was no representative of that group in the room!

The case study is written in a humorous style, and people always have fun discussing it, but it is based on real issues I have seen in Canadian nonprofits. The range of images generated by the tables when they are asked to envision and draw the ideal future for the unicorns still fascinates me.

I break the participants into small groups. Most believe the future should continue to have unicorns (they have already suspended disbelief). But about half of the small groups draw a protected area in which unicorns live free and wild. Even though I ask that the drawing be about the unicorn future, not the organization, these groups specify that a nonprofit organization still exists to maintain and protect the wild area. Sometimes they include services, such as veterinary clinics and hoof care, on the edge of the area, and some borrow unicorns occasionally to help with fundraising and awareness. The unicorns thrive because they are no longer shot for their horns.

The other small groups draw a society in which unicorns are part of human society. They live with families, carrying children to school or earning a living testing the integrity of politicians. Occasionally, the unicorns become politicians, teachers and whatever other professions they wish. They thrive through integration. These pictures are much less likely to depict unicorn courtship and families, but presumably baby unicorns keep being born since they are so valued within society. In most of these scenarios, the Unicorn Rescue Society has disappeared because it was no longer needed.

Very few imagine a future in which some unicorns can choose to live free and others can choose to be productive members of urban societies. Admittedly the workshop participants are not given that much time to craft a picture. Besides, they may think there will not be enough resources to support both options. So they end up with competing, incompatible visions due to conflicting values.

What if the workshop attendees were an actual board of a single organization? Can you see how different the mission would be, as the organization figured out its role in making the desired future happen, depending on which vision was chosen? Can you imagine the discussion to agree on priorities?

Perhaps you can imagine it only too well, because your own organizations have faced similar agonizingly real choices. I find this particular dichotomy comes up most often when people are planning for clients who cannot easily speak for themselves, whether animals or young children or people with severe disabilities. Parents, caregivers and service deliverers often want safety and protection, when the clients are struggling to communicate that they seek some risk and challenge in their lives.

Other values conflicts arise in other organizations. Making them surface is very, very useful, because then everyone can be on the same page after the discussion. Until dialogue takes place about values, I can guarantee that your board and staff do not agree on how common words like Respect and Fairness are to be interpreted within the organization. Dictionary definitions do not cut it.

The vision drawings graphically demonstrate the values of those who draw them, and their assumptions about what the unicorns would want. By the way, since unicorns would be a type of horse, they are herd animals that see themselves as prey and therefore seek safety in numbers. Their choices might not resemble ours, especially in a sector so focused on inclusion and diversity that it is hard to find positive terms for sameness or exclusion.

How can you apply this idea? By NOT just listing a bunch of words like fairness and honesty, which everyone readily agrees upon because they are not challenged to make tough choices. Start instead with pictures, identify the ethical values being depicted, and talk them through. Achieving real agreement on the ethical values will make all the subsequent choices much easier. You may still lose some good people who want to pursue a different set of values, but they are better to move to organizations where there is a fit for their choices.

Remember that only those present at the discussion will initially understand how the new vision and values list were decided upon. So it is critical to develop full sentences to explain what each ethical value term means, and to have continued dialogues about meaning and application.

You can keep the ethical values of the Strategic Plan alive by referring to them frequently in communications, especially when communicating decisions and when advertising openings, particularly openings for board and senior management. Try to get an up-front fit with the values, since these people will be role models for the values. Evaluate behaviour against the values too, particularly in the course of performance evaluations, merit increases or bonuses, and promotions.

In summary, use creative ways to develop options for a new Vision (the better world that will exist because your organization exists now, whether or not it still does). Draw out the ethical values from that activity, and talk about them. Get agreement from a significant majority on what they are and what they mean. Then check every decision against them in the balance of the planning, and in future board meetings, and in day-to-day decisions too.

Now have some fun, and figure out what future you would want if YOU were a unicorn.