



Interaction Institute
for Social Change

PLANNED PARENTHOOD LEAGUE OF MASSACHUSETTS

A Case Study in Collaborative Organizational
Planning and Capacity Building



About the Interaction Institute for Social Change

The Interaction Institute for Social Change (IISC) is a nonprofit organization that partners with individuals, organizations, and communities to achieve greater social impact. Our multicultural team of seasoned consultants provides network building, consulting, facilitation, leadership development, and training services to a diverse array of clients that includes networks, collaboratives, and coalitions; nonprofit organizations of all sizes; schools and school systems; intermediary organizations; public sector agencies; international NGOs; and foundations. Our clients work in all disciplines of the social sector and are located throughout the United States, in Ireland, and beyond. We are particularly committed to building the leadership and collaborative capacity of grassroots leaders to engage, speak out, and participate fully in determining the policies and decisions that affect their lives and their communities.

The work of IISC is informed by our theory of social change, mission, and values. At our core, we practice and teach facilitative leadership – a model rooted in shared power and decision making, consensus building, collaborative skill, and servant leadership. We continually strive to deepen our capacity to address issues of power, privilege, and oppression related to various dimensions of diversity and design culturally appropriate processes and services that consciously address power dynamics.

IISC was founded in 1993 by Interaction Associates (IA) as an expression of its commitment to social change and as a way of bringing its collaborative methodologies into the social sector. Since that time, IISC has grown from a staff of two to an organization with nearly twenty staff members and a cadre of affiliates who have worked with thousands of change agents across the globe and social sector. In support of these efforts, IISC has adapted the collaborative and leadership development methodologies inherited from IA and created new and innovative approaches to working with and meeting the needs of social change leaders.

Planned Parenthood League of Massachusetts: A Case Study in Collaborative Organizational Planning and Capacity Building.

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Executive Summary

In 1999, Planned Parenthood League of Massachusetts (PPLM) experienced a significant change in leadership. After 25 years under one executive director, PPLM's board of directors hired Dianne Luby, former New Hampshire Public Health Director, to lead the organization into the new millennium. Luby was chosen for a combination of factors, including her entrepreneurialism, record of accomplishment across sectors and experience with community-based and managed health care.

Luby assumed her post at a time when PPLM had been losing money on preventative care, marginalized by opposition to Roe v. Wade, and marked by a lack of integration across its three sites, various departments, and predominantly young and relatively inexperienced staff. In her first six months, Luby succeeded in improving PPLM's revenue streams and saving the organization's GYN services. She then turned her attention to larger adaptive challenges. Luby's search for an external consultant who could facilitate a staff-wide strategic planning process as well as build collaborative skills and leadership capacity led her to the Interaction Institute for Social Change (IISC).

Over the course of a year long planning process, IISC staff worked with PPLM board members and senior management to create a five-year strategic plan that incorporated input from all staff. In addition, IISC provided training in collaborative leadership skills and coaching techniques to over

half of the organization's personnel. The result, in the words of Dianne Luby, was "transformational." The process of strategizing together facilitated teamwork and understanding across departments and sites as well as between board and staff. The leadership and coaching trainings developed skills that led to more focused planning, organization, and teamwork. And with its strategic plan, PPLM developed a unified vision and concrete steps for making the organization a mainstream player around reproductive rights.



“The whole process for us has been, I think, transformational.”

-Dianne Luby

Background

Planned Parenthood League of Massachusetts (PPLM) has a long and rich history underlying its present day programs and operations. PPLM traces its roots back to 1916, when a group of concerned citizens came to the aid of a young man who had been arrested for distributing pamphlets on birth control to factory workers in Boston’s North End. Since then, the organization has undergone a number of transformations, changing name, focus, and tactics as it has responded to legal and policy shifts around the issue of birth control and the evolving conversation about reproductive rights.

By turns a legal defense counsel, voluntary health education agency, and advocate for family planning services, today PPLM provides education and training, counseling, advocacy, and medical services in pursuit of its mission “to protect and promote reproductive health and freedom of choice.”¹ In recent years, PPLM has been noted for its high quality health services, aggressive litigation against antiabortion activities, as well as for its development of innovative security strategies for training clinic staff and clients. It has also been a pioneer in developing youth education programs that have been replicated around the country.

At the end of the last decade, PPLM experienced a significant transition that saw the end of a 25-year leadership tenure. In 1999, the board of directors hired Dianne Luby, former Public Health Director for the State of New Hampshire, to lead PPLM into its next phase of existence. Luby’s career spanned both nonprofit and for-profit sectors, and included starting and running a community health center, as well as working in several health maintenance organizations (HMO’s). The combination of her entrepreneurial and cross-sector background, community-based and managed care experience, and knowledge of health care reimbursement and Medicaid were an excellent match for the board’s wish list of executive competencies.

The Challenge

Upon assuming leadership, Luby immediately faced a number of items on the agenda set by PPLM’s 1994-2000 strategic plan, as well as the board’s own list of priorities. Convinced that she had six months to do something significant and gain the confidence of the board, Luby’s first response was to address financial issues. PPLM had been losing money on its preventative health care services. Disagreeing with a consultant’s advice to get out of the business of providing GYN services, Luby started renegotiating all of the organization’s insurance and managed care contracts and instituted an internal reimbursement team to concentrate on fair and equitable reimbursement services. Her efforts were successful in both improving revenue streams and in saving PPLM’s core services. Luby then turned her attention to the next strategic challenge.

¹ Planned Parenthood League of Massachusetts website, www.pplm.org/Mission/pplm1.html



Building upon the financial turn-around, Luby was eager to set a results-focused direction for PPLM, a direction that would cement the organization's role as a mainstream healthcare provider. In Luby's estimation, the organization had been marginalized by opponents to *Roe v. Wade*. While all staff members of Planned Parenthood were mission-focused, some were relatively detached from the business management aspect of the health care practice and lacked an understanding of how their own individual efforts contributed to the whole. Furthermore, with its array of services and three different offices across the state, PPLM faced a challenge around integrating its work and facilitating communication between personnel across departments and sites.

Given this situation, Luby's goal was to collaboratively develop a vision and strategic plan to which the entire PPLM staff could wholeheartedly commit. Furthermore, she was interested in developing the leadership capacity of the predominantly young female staff to feel more confident in the work they did to run the organization. "I wanted the strategic planning process to help people understand how the business aspect is totally integrated with the mission and how that's totally integrated with results and expectations, that they're all meshed together." Her search for an outside consultant who could facilitate strategic planning, build capacity, and appreciate the history and mission of PPLM, led Luby to the Interaction Institute for Social Change (IISC).

IISC's Framing of the Challenge

From IISC's perspective, Planned Parenthood League of Massachusetts faced, at a fundamental level, the challenges that accompany a change in leadership as well as the opportunity to collectively re-envision the organization's future. Poorly managed leadership transitions often cause continued executive turnover, loss of organizational focus, and extended periods of underperformance. A successful transition, on the other hand, can improve balance and strength, especially when emphasis is placed on relationship-building, information sharing, and building consensus on direction and priorities.

PPLM's specific context presented additional challenges stemming from the on-going national debate surrounding reproductive rights, as well as concerns for the safety of employees in reproductive health care facilities. Given the complexity of these issues, setting future direction required a diversity of input across the organization's areas of service and three office locations. In IISC's view, such input would be an important step in the direction of integrating PPLM's sites and facilitating future collaboration and information sharing between departments.

Furthermore, PPLM faced the challenge of balancing its institutional mission with concerns for the broader social context and community in which it operated. The late Peter Drucker spoke of "the new

² Peter F. Drucker, "The New Pluralism" (*Leader to Leader*, Fall 1999) 18-23.

pluralism”, which is characterized by the dramatic growth in the number of organizations addressing ever more specific needs in increasingly specialized ways. ² IISC firmly believes that in such complex contexts, collaborative capacity is vital to leaders and organizations for internal coordination and alignment as well as the development of external perspectives and partnerships, all of which lead to greater organizational effectiveness and broader social impact.

Therefore, with respect to strategic planning, IISC’s approach requires several starting ingredients. It is important that leaders want broad participation and welcome opportunities to work and plan together. Key stakeholders must be identified and appropriately involved in the process so that they can contribute their ideas, remain informed about progress, participate in decision-making and be prepared to help implement decisions. The process should be led by an inspiring vision and based on a shared understanding of the internal and external situations at the time of planning. And it is necessary that there be a shared commitment to the process, including an understanding of the time, attention, and resources that will be required.

The Process

Once the challenge had been framed and Luby’s goals articulated, IISC proposed a two track process for moving forward (see below), with one track focused on the development of a new five year strategic plan and the other oriented towards building the capacity of PPLM staff to lead and work

IISC/PPLM Collaborative Planning Process

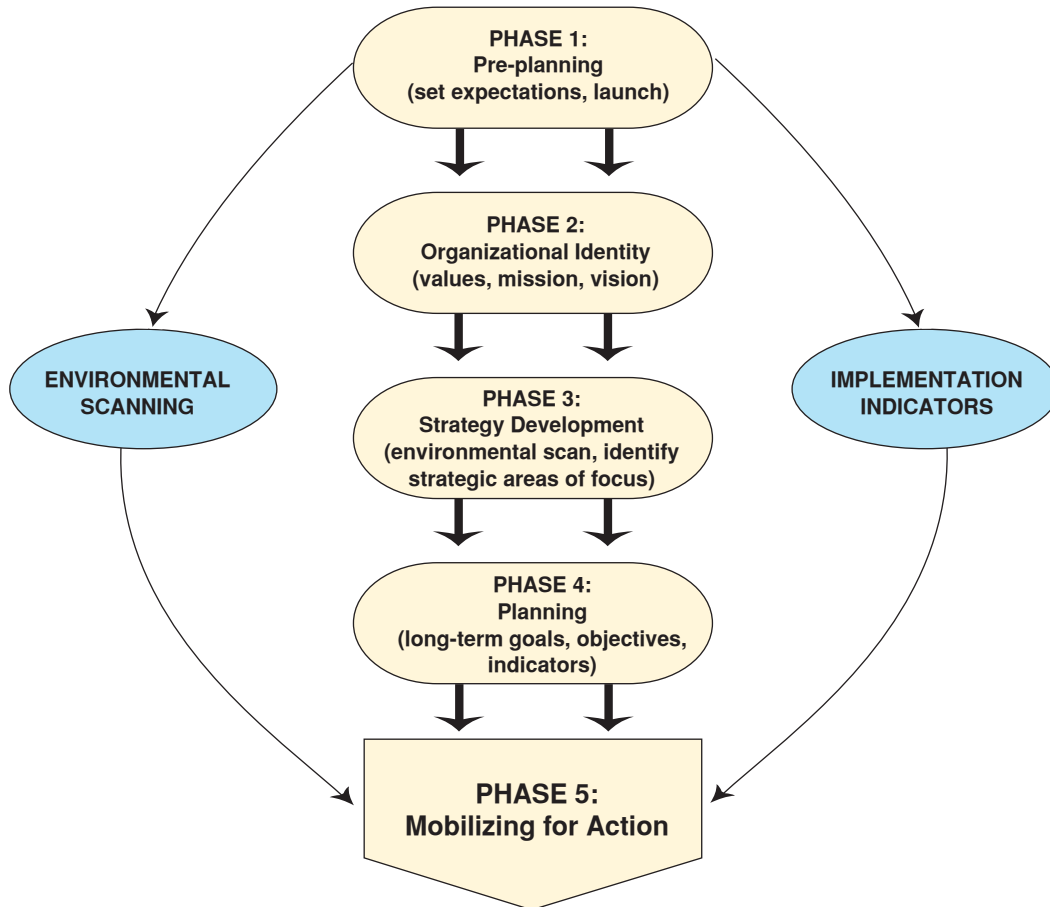


collaboratively. PPLM agreed to contract with IISC for the entire scope of the work.

In April of 2001, PPLM held a board and senior management retreat to kick off the strategic planning process. With the guidance of IISC, PPLM selected a core group, or Design Team, to establish the overall timeline and steps for moving forward, following phases of the strategic planning model (see illustration on next page). The Design Team is an important element in IISC’s collaborative approach to working with organizational and large scale change initiatives. In general, Design Teams:

- partner with IISC to design an inclusive and efficient process;
- synthesize and document data throughout the process;
- provide ongoing information and feedback about the initiative, people involved, and process;
- serve as a group of ambassadors and advocates for the process and for strategic change; and
- connect stakeholders to the process and reflect their thinking/points of view.

IISC Strategic Planning Model



Given its responsibilities, it is important that the Design Team have the ability to work collaboratively and consist of representatives of key interests and perspectives. In addition to Dianne Luby and IISC consultants Courtney Bourns and Marianne Hughes, the Design Team for this strategic planning process included the following PPLM representatives: Meagan Gallagher, Chief Financial Officer; Jill Kantrowitz, Director of Education; John Pratt, Board Chair; Heather Sankey, Medical Director; Sam Wood, Clinic Assistant, and Jamie Jefferson, Senior C.A., GYN.

In June, this team met to firm up the goals of the process and conduct an initial stakeholder analysis to decide who should be involved throughout the project and in what capacities. IISC plugged the decisions of the Design Team into a “process map,” another key element used in IISC collaborative initiatives (see Appendices). Meant to be flexible, this document visually captures the timeline, designated phases, corresponding stakeholders, and targeted outcomes and agreements to clearly chart a project’s course.



During the summer of 2001, IISC consultants initiated the capacity building track of the project by delivering a series of Facilitative Leadership® trainings to over half of PPLM’s staff members state-wide. Each of these three-day sessions featured horizontal and vertical cross-sections of staff so that participants had the opportunity to interact with those with whom they typically did not. Facilitative Leadership® is a core and well-established training program of IISC that helps participants develop skills that allow them to “inspire and create the conditions for self-empowerment so that people can work together to achieve a common goal.”³ At the heart of the workshop are seven core leadership practices. Trainees learn how to:

- create a vision of success and enroll others in its pursuit;
- lead collaborative planning and problem-solving discussions;
- decide who should be involved in making decisions and how to involve them;
- coach and inspire others to perform at their best;
- design meetings, project plans and change strategies with concrete milestones and accountabilities;
- consider and measure progress across three dimensions of success—results, process, and relationships; and
- celebrate accomplishment in authentic and motivating ways.

Also during the summer, IISC began gathering input about PPLM’s future direction from all levels and departments of the organization. This was the first step in crafting a vision statement to guide PPLM’s strategic plan. Sessions were held at each of PPLM’s offices, and included an exercise asking participants to imagine a lead magazine story featuring PPLM

as a successful organization 10 years in the future. As feedback was gathered and synthesized into the beginnings of a vision statement, work began, with broad staff input, on the development of a set of “strategic levers,” or areas of strategic focus, to bring the evolving vision to life. This opportunity to vision together, along with the Facilitative Leadership® trainings, would prove critical to setting the stage for PPLM’s successful transition into more team-oriented work.

At the end of the summer, the Design Team presented its work to the PPLM board, which expressed discomfort with the vision statement and enumerated levers. Initially, board chair John Pratt had been part of the Design Team. However, during the summer, the decision was made to have the PPLM senior management team drive the overall process. This decision came out of recognition that senior management team’s ownership of the process and plan would be critical to successful implementation. Furthermore, because the members of the management team were relatively young and new to their respective jobs, having them serve as the engine of the project was viewed as a means of building relationships and helping them to develop strategic thinking skills. An unforeseen consequence of this shift was that only a few board members were involved in the initial visioning sessions. The inadequate involvement of this important stakeholder group meant that the work of the management team had to be reworked with board members so that the latter understood, had the chance to contribute to, and could ultimately commit to the overarching vision and its corresponding levers.

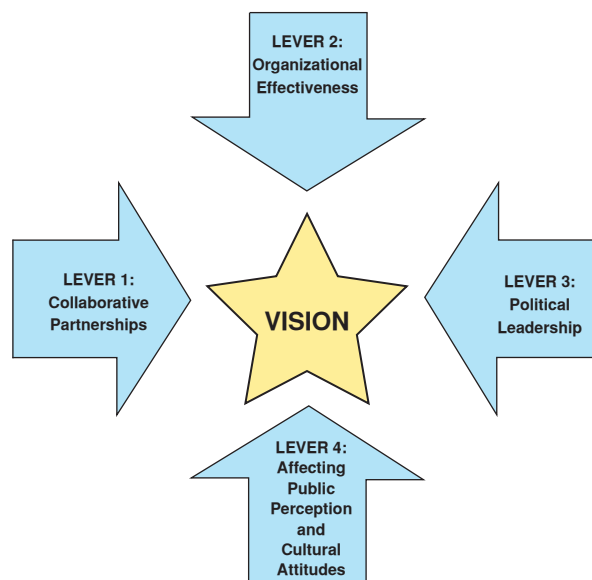
³ Interaction Associates, *Facilitative Leadership: Tapping the Power of Participation*. (Boston: Interaction Associates, 2005).

As it unfolded, the visioning process revealed the variety of motivations that brought different individuals to the work of the organization, from the more “radical” to the more mainstream. This resulted in divergent visions for PPLM’s future, which required further dialogue and understanding. In November, IISC facilitated a work meeting of board and staff members to come to agreement on a shared vision (see Appendices). Participants also reached consensus on four key strategic levers (see illustration below) and began work on long term goals for each “critical result area” or department—Clinical, Advocacy, Education, Finance, and Technical. By the end of the meeting, it was decided that a Strategic Planning Committee, made up of board and senior management team members, would shepherd the process going forward.

As the Strategic Planning Committee continued to refine the core of the plan, IISC surveyed PPLM staff to identify areas where further attention was needed around building a more collaborative organizational

culture. Survey results indicated that staff were hungry for and would benefit from additional training, specifically to support supervisors in their day-to-day work. In March of 2002, IISC conducted a two-day workshop on effective coaching techniques. The Coaching Edge™, another of IISC’s established training programs, was delivered to a group of PPLM staff members to provide them with a framework for building and maintaining coaching relationships with their supervisees.

Through the early months of 2002, the Strategic Planning Committee and IISC facilitators engaged staff teams in refining the strategic plan, setting long-term objectives and goals for each strategic lever, and establishing indicators, responsibilities, and an overall timeline for implementation. In the late spring, the plan was presented to the PPLM board and was unanimously approved. In the summer of 2002 the Planned Parenthood League of Massachusetts’ 2002-2007 Strategic Plan was unveiled and officially launched.⁴



⁴ For a complete copy of the PPLM Strategic Plan 2002-2007, go to www.pplm.org/mission/StrategicPlan.pdf.



Outcomes

The most tangible outcome of this year-long collaborative process was a completed strategic plan that incorporated broad input and had widespread support from PPLM staff and board members. The plan provided a unified vision and concrete steps for making that vision a reality. Three years out from its completion, the plan is a living breathing document.

Following Dianne Luby's initiative, PPLM designed a shared database that resides on all desktops so that staff can access the strategic plan, monitor and own particular results, and make comments and suggestions going forward. Luby remarks, "The whole process for us has been, I think, transformational in that we have annual results, we don't just all go off in a gazillion different directions, we know where we're going for the year. We build our annual budget around a prioritized set of results. We are really building a group of people who say, 'You know, we're going to do something,' and then they do."

Furthermore, the practice of strategizing together presented a valuable opportunity for PPLM staff members to grow beyond their comfort zones. Chief Operating Officer, then Chief Financial Officer, Meagan Gallagher says that the experience interacting with colleagues across departments and sites was important for the organization: "I think that the opportunity to think big was really what we needed at that point in time." Throughout the visioning process, the staff and board were able to learn more about one another and come to

understandings about where they agreed and where they disagreed on PPLM's future direction. Luby found this particularly significant: "There were some big breakthroughs for all of us in figuring out how [staff members] see things and how [board members] see things for public consumption." This ultimately helped everyone involved get much clearer and more focused on the core of a shared vision.

With respect to the capacity building work, individual staff members and the entire organization absorbed concrete collaborative practices to improve overall effectiveness. Dianne Luby believes her organization is more focused on planning and organized in its activities as a result of the Facilitative Leadership® trainings.⁵ Meagan Gallagher references the shared language and practices PPLM has developed around planning and running meetings. For example, staff members have "a common understanding that decisions are made in a variety of ways and, from that menu of options, that some decision-making processes are more appropriate than others in any given situation." Many of the tools taught and modeled by IISC have become a part of PPLM's organizational DNA, such that newcomers inherit them without knowing their origin, or that they had ever not existed.

In general it appears that PPLM is making considerable progress as it strives externally to be more of a mainstream player around reproductive rights, and internally to be a more cohesive and integrated organization. For example, PPLM is now training internal medicine physicians in reproductive health and serves as a base for clinical

⁵ As an indication of the value placed on the experience, Luby brought IISC consultants back in early 2005 to provide Facilitative Leadership® training to new staff members.



researchers who have received national fellowships to study reproductive health issues. The organization has also signed long-term agreements to work with schools and nonprofits around sex education. Luby credits the strategic planning process as facilitated by IISC with helping PPLM focus on the things it needed to do to build these collaborative relationships, as well as getting staff working in a coordinated fashion with a sense of pride and an emphasis on the quality of their work.

Lessons Learned

For IISC, the work with PPLM was a rich learning experience that afforded insights into ways of improving similar strategic processes in the future. For example, IISC consultants were reminded of the importance of paying close attention to strategic stakeholder involvement. While she believes the decision to have the PPLM senior management team function as the Design Team was not necessarily a bad one, lead IISC consultant Courtney Bourns says she will do some things differently in the future. In particular, she will have a visioning process for the entire board of directors and involve individual board members in senior management conversations where the synthesis of input around vision and strategic areas is occurring.

IISC also learned from the example set by PPLM leadership. While Dianne Luby was willing to fully embrace and invest in the process, she did not relinquish her role as a leader. Bourns remarks: “I really appreciated working with Dianne because she was a leader who knew what she wanted, . . . she

was really good at challenging the organization to move forward.” An active and vocal participant in the process, Luby held up her own vision for the organization without being closed to new ideas. As a result, when IISC stepped away, the process continued to move forward.

Overall, the project highlighted for IISC the value of a comprehensive intervention and client buy-in to this approach. Working on two tracks simultaneously allowed PPLM to develop a plan, increase the likelihood of successful implementation, and establish collaborative practices for the future. In the words of Bourns, “This case is a good example of a holistic intervention. It was a long term planning process involving the maximum possible number of stakeholders in an organization and it had a parallel track of capacity building. I think in some ways that represents our ideal model for a full organizational intervention.”

Finally, this case holds important lessons for any mission-based organization engaged in a leadership transition or other significant strategic shift. These moments often present themselves as opportunities to re-envision the future, re-direct organizational energies, and re-invigorate staff for greater impact. Skillfully implemented, collaborative methodologies can help to unleash collective creativity and intelligence and build the relationships, commitment, and ability to effectively address the complex problems that are part of a shared present and future.



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PPLM Vision Statement

At Planned Parenthood League of Massachusetts, we envision a future where there is universal understanding and support for the right of each person to responsibly manage their sexual and reproductive health. The right to reproductive self-determination, about whether and when to have a child, promotes women's freedom and equality. When family planning is a fundamental mainstream value there will be a gateway to allow each woman to fulfill her own dreams.

We envision a future where laws will guarantee these rights and ensure access to quality health care, education and advocacy services. These services will be readily available in safe settings that preserve and protect the privacy and rights of each individual regardless of income, age, marital status, race, ethnicity, or sexual orientation.

PPLM will work collaboratively with a broad coalition of schools, organizations, parents, elected officials, and policy makers to encourage and promote strong families and communities. We will work with our partners to create a future where laws and funding will be based on the health needs of individuals and the desire to achieve positive health outcomes, versus divisive moral, social or religious personal agendas. In this climate, policy makers will embrace prevention initiatives, and there will be broad support for family planning, sexuality education, and freedom of choice.

Months/ Phases	March-April 2001 Pre-planning Design	April-August 2001 Process Design → Vision Phase	September 2001-April 2002 Strategic Development & Action Planning	June 2002 Celebration and Launch of Implementation
Stakeholders & Activities Strategic Planning				
Capacity Building		Boston Springfield Worcester Facilitative Leadership Training & Visioning		
Outcomes	<ul style="list-style-type: none"> • Design Team recruited • Process map created 	<ul style="list-style-type: none"> • Agreement on mission, vision, values • Facilitative Leadership skill development among staff 	<ul style="list-style-type: none"> • Agreement on Prioritized list of problems/challenges facing PPLM • Agreement on strategic intent • Agreement on levers for achieving vision 	<ul style="list-style-type: none"> • Coaching skill development among staff/supervisors • Agreement on long-term goals • Agreement on long-term objectives • Action plan
Key of Symbols	Board Meeting	Staff Meeting/ Training Design Team or Senior Management Team Board & Senior Management	Additional PPLM Staff	

Final 2/19/06 Process Map created in collaboration with the Interaction Institute for Social Change