Board Leadership Calgary

From Visioning to Action

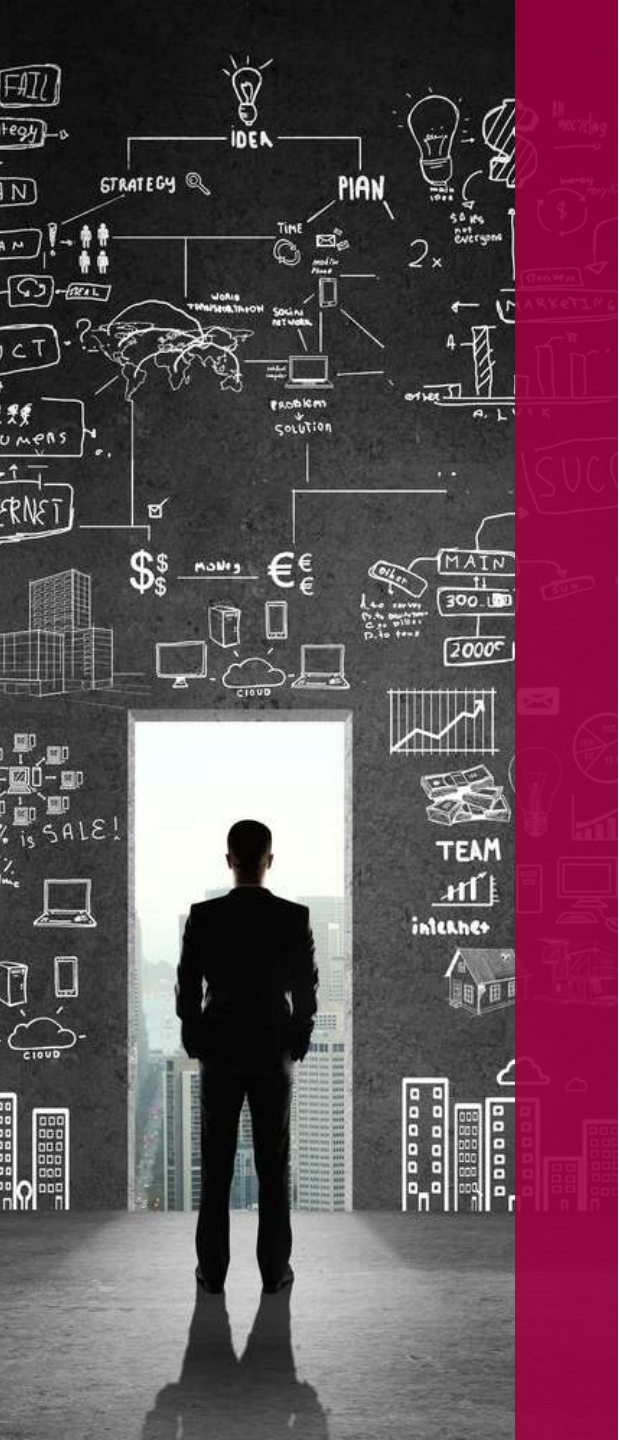Practical Strategic Planning

Alberta
Culture and Tourism

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Community Development Unit

Community Development Unit

- **Planning:** Strategic Planning, Operational Planning, Action Planning

- **Board Development:** Governance, roles and responsibilities, effective meetings, bylaw review, policy development, committee roles, recruitment, etc

- **Public Participation:** Stakeholder and public engagement projects and meetings

- **Project Development and Evaluation**

- **Fund Development:** Grant resources, fund raising, proposal writing

- **Leadership:** Engagement, development and training

- **Collaboration and Partnerships**: How to build effective collaborations, coalitions, partnerships and team building

- **Large community development initiatives**: Community mobilization on an issue, community event planning, etc.

Introductions

Learning Outcomes

- Gain a greater understanding of strategic planning and its benefits for your organization

- Identify and explain components of a strategic plan

- Explore tools, processes, and techniques to prepare a results-driven strategic plan

- Take away tips to keep your plan alive and useful
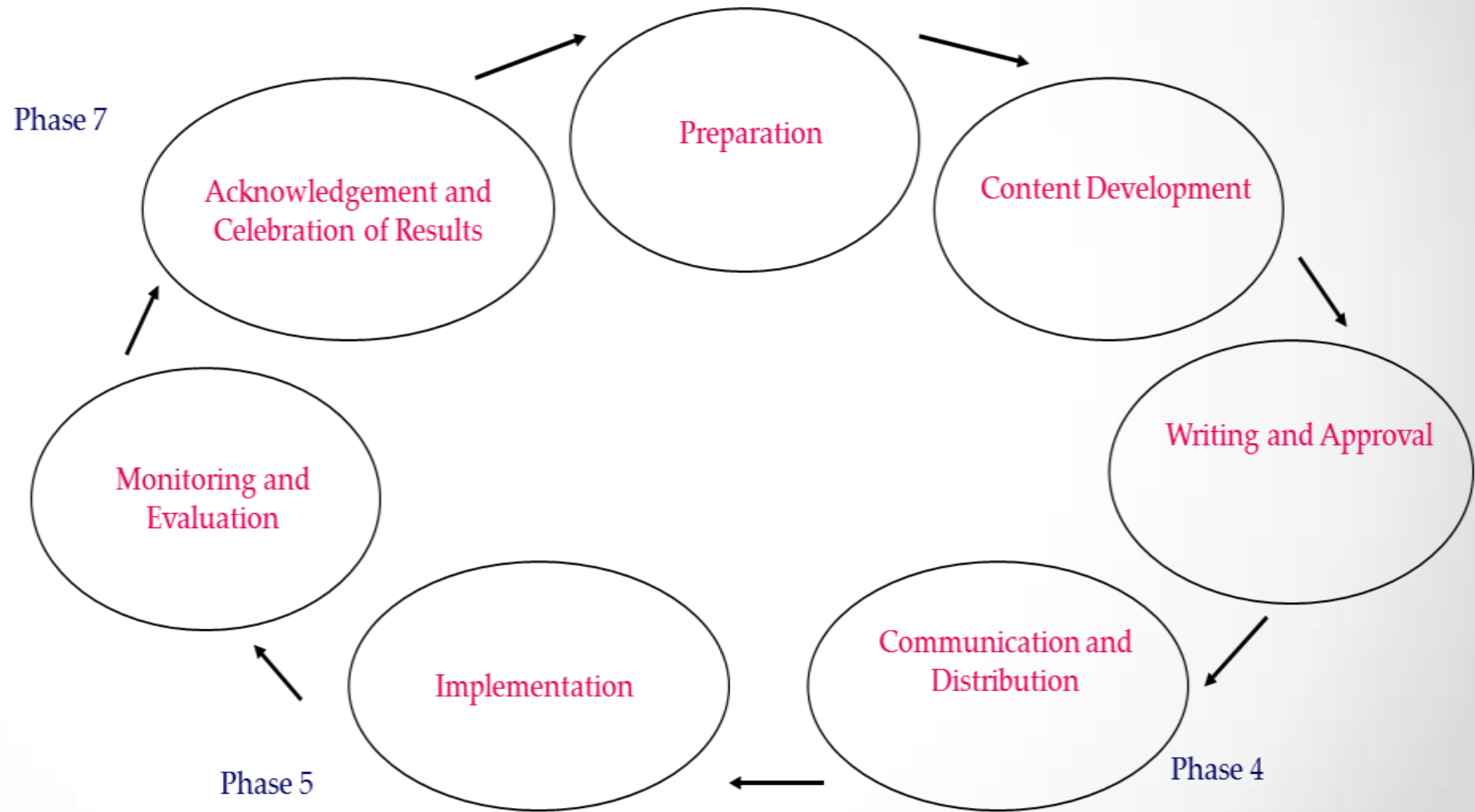
What is a Strategic Plan?

Definition of Strategic Planning

- The process of building a plan (product) that includes good strategy (awareness and action)

- Turns goals and strategies into formal, documented steps that can be implemented

Phases of Strategic Planning

Why Plan?
The Benefits of Strategic Planning

Benefits of Strategic Planning

- Sets clear future direction
  - Provides roadmap to achieve vision and purpose of organization
  - Provides a forum to discuss the big picture and share perspectives

- Identifies what success looks like for an organization

- Builds and sustains a competitive advantage

- Enhanced perceptions of legitimacy

- Provides continuity in direction and leadership in times of rapid member turnover and improves change management efforts

- Organizations that plan outperform those that do not!

(Byson, 2004; Deephouse & Suchman, 2008; Elbanna, 2009; Porth, 2003; Mezger & Violani, 2011)

Benefits of Strategic Planning

- Improved team dynamics
  - Helps new members get up to speed on the work of the organization and helps the current members stay focused on organizational goals
  - Reduced conflict and insecurity

- Builds ownership, commitment, and purpose

- Helps members become familiar with all parts of the organization

- Provides common language and a common bond

- Improved progress tracking and measures success

(Brews & Hunt, 1999; Elbanna, 2009; Porth, 2003; Mezger & Violani, 2011; Wolf & Floyd, 2013)

Motivating Boards to Plan

- Public trust

- Secure the future

- Influence the direction – leave your legacy

- Continuity

- Team building

- Reduce time spent at monthly meetings

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Components of a Strategic Plan

Components of a Strategic Plan

People may be aware of different terminology, but essentially:

- **Environmental Scan**

- **Foundational Statements**
  - **Mission**
  - **Vision**
  - **Values**

- **Goals**

- **Action Plan**

Where does <u>your</u> board stop?

Environmental Scan
Aka Situational Analysis

Environmental Scanning

Three definitional points:

- The practice of **systematically** exploring and interpreting the internal and external environment…

- in order to better **understand** the trends and drivers of change…

- and their **impact** on your organization

Tips for Effective Scanning

- Conduct research BEFORE your strategy sessions and on an ongoing basis
  - Use credible sources
  - Get diverse perspectives

- Use multiple scanning "tools" or "lenses"
  - Historical scan, SWOT, STEEP, Wave

- Reflect on the key factors impacting your organization and/or its stakeholders
  - How will environmental trends effect what we do?
  - What will challenge our "relevancy" in the future?

- Decide and focus on a few critical factors for strategy formulation

(Bryson, 2004; Everett & Duval, 2010; Grant, 2003)

Environmental Scanning Activity

- We are going to do a very quick example of a wave scan using 5 groups & topics:
  - **Political**   orange stickies
  - **Economic**   blue
  - **Environmental**   green
  - **Social**   pink
  - **Technology**   yellow

- For your area brainstorm trends & issues that are:
  - **Disappearing**
  - **Established**
  - **Emerging**
  - **On the horizon**
  -

Foundational Statements

Foundational Statements

- Commonly called Mission, Vision, and Values statements

- One of the most common strategic practices in all types of organizations

- They are critical to organizational performance and sustainability
  - Perceived legitimacy
  - Organizational culture
  - Recruitment and Retention
  - Organizational Change
  - Increased Trust
  - Commitment
  - Client Satisfaction

- Tendency for their effectiveness to be diminished through buzzwords, jargon, and overlap between statements

Vision, Mission, and Values/Beliefs/ Guiding Principles

Mission: Current purpose statement describing WHO you are, WHAT you do, FOR WHOM and HOW

Goals

Action Plans

Vision: Desired future for community

Values, Beliefs, Guiding Principles

Values are the fundamental principles and beliefs that form the foundation of the organization. These principles guide the organization's behaviour, services and decisions.

Foundational Statements:

Mission Statement

- Describes the purpose for the organization or why the organization exists – true identity

- Describes what makes the organization unique

- Answers questions:
  - **Who you are?**
  - **What do we do?**
  - **How do we do it?**
  - **For whom do we do it?**

Foundational Statements:

Vision Statement

- Describes what will be different in the future (20+ years) as a result of your organization

- Cornerstone of planning that is usually described in current language

Foundational Statements:

Values Statements

- Fundamental beliefs that guide and support the group's actions, judgments, and decision making across situations

Questions to Think About…

- How do we make a DIFFERENCE for those we serve?

- How do we want to POSITION ourselves?

- Where is our greatest VALUE?

- What do we need to do DIFFERENTLY?

- What do we need to LET GO of?

Tips for Effective Foundational Statements

- Boards role is to set foundational statements

- Should be clearly understood by those inside and outside the organization, simple and without jargon

- Need to be discussed and shared throughout the organization

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Goals

Goals

- Outcome based statements that describe what the organization hopes to achieve in order to move the organization closer to its vision

- Key areas that your organization will focus on over a set period of time (focus your resources, energies, efforts, time etc.)
  - o Short or long term

- Programs, services, and resources should be aligned for the achievement of goals

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Tips for Effective Goals

- Based on your scan, what are your options?
  - Create alternatives of preferred futures. Challenge the default future.
  - What do you need to do to create the "preferred future"?

- Evaluate your options. Which ones make the most sense to pursue in the context of your environment?

- Narrow goals to those that have a significant influence on the larger scope of the organization and degree of commitment

Outcomes

- The products or results that occur when the Goal is achieved (what we observe)
- "When -Then" logic
- "When" the Goal is achieved "Then" what will you see?

Three types of outcomes

1) Change in skill or knowledge
2) Change in attitude or behavior
3) Change in status or condition

- Example – Bullying issue
  - Knowledge of what bullying looks like
  - Attitude that it is not acceptable behavior
  - Bullying is reduced so kids feel safe

Goal Statement Development For Example

Template

"_____" "_____" "_____" within/by "_____"

entity   verb in present   statement that brings together the   timeline

"*ABC School*"   "*is*"   "essence" of the ideas of the issue

"*has*"   & states where the <u>entity</u> needs to

"*provides*"   be related to that focus area

"*educates*"

Example – "ABC School educates students on bullying reduction

strategies, formally and informally, on a regular basis"

Or "ABC School provides a supportive environment to deal with any

harassment situations immediately"

Action Plans

Action Plans

- Specific, detailed steps or activities to DO to accomplish the broader goal

- Who is responsible

- Time frame (start and finish dates)

- Resources required

Strategy Formulation

- Application of a strength against a weakness
  - Neutralize or eliminate threats
- A strength applied to the most promising opportunities
  - Exploit opportunities
- Creation of strength through coherent set of actions

(Rumelt, 2011)

Action Plan Development

- Use the information gathered in the environmental scan to inform possible options and strategies
  - Think of actions or strategies to capitalize on opportunities or minimize risks identified in the environmental scan

- Incorporate input from many sources such as board, staff, volunteers, clients

- Generate many ideas without evaluation or criticisms
  - Generate as many crazy ideas as possible

- Develop criteria and evaluate your strategies and actions to narrow it down

(Hamalian, 2012; La Piana, 2008; Rumelt, 2011)

Indicators:

- Milestones that indicate whether you are making progress towards your goals & objectives

Performance Measures:

- Data you collect in order to measure achievement of goals and objectives

Limitations of Strategic Planning

Limitations of Strategic Planning

- Truly strategic processes can involve heavy financial, human, and time resources
- Planning does not provide a precise picture of the future
- Cannot overcome traditional policies, procedures, strategies, and operations without commitment from planning team
- Does not replace intuitive and responsive decision making (emergent strategy)
- Not intended to help planners overcome critical, threatening situations

Keeping your Plan Alive

Keeping your Plan Alive

- Do not want plans that sit on shelves and gather dust!!!

- Need to implement strategies and practices that will ensure we are USING the plan

- HOW?

Indicators of Success

The plan:

- is clear

- is consistent

- is communicable

- motivate staff and others

- guides decision making and actions

- is used to set priorities for time and resources

What can we do to make strategic plans, living-breathing-working documents?

Keeping your Plan Alive

Here are some ideas to try:

- Adopt the Plan formally

- As a board member, be familiar with the Plan

- Ensure all members have a copy of the Plan and should be with them at each meeting

- Often ask the question at regular meetings; "How does this action/motion we are discussing now align with the goals in our Plan"

- Monitor and Evaluate!! Build in regular Plan reflections and reviews

Keeping your Plan Alive

Here are some more!

- Have the plan Goals as "Standing Items" at regular meetings with an assigned member to speak to the "developments" in that Goal since the last time you met

- All reports should show "connectivity" to the goals in the Plan

- The process of "building and updating" the plan should be done by all members to ensure ownership, understanding, familiarity and commitment to it!!

Thank you from:

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