

## Strategic Planning: Navigating the Road Ahead

Board Leadership Calgary  
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1

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### Organizational Capacity Development

- Governance
- Strategic and Business Planning
- Organizational Assessments
- Outcome / Results Planning and Measurement (Monitoring and Evaluation)

### Resource Mobilization

- Partnership Development
- Social Enterprise
- Marketing and Communications
- Fund Development

*Training*

*Facilitation*

*Consulting*

*Coaching*

2

## Learning outcomes

- Gain a greater understanding of strategic planning, its benefits, components, and cycles;
- Identify and learn how to apply practical, simple processes and tools to develop a strategic plan;
- Learn approaches to create and maintain a living strategy that is adaptable and results driven.

3

## Strategic Planning

A process to assess the landscape,  
select strategies and implement actions,  
and review progress  
to achieve your mission and vision

4

# Purpose and Benefits

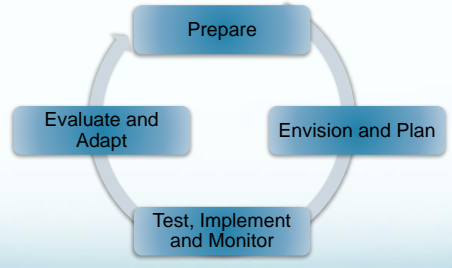
## Content

- Provides a roadmap through changing environment
- Turns strategies into actions
- Provides focus on priorities and helps to allocate resources
- Identifies what success looks like and measures it
- Identifies organization's role and contribution to larger community

## Process

- Opportunity for stakeholders to engage and share perspectives
- Increases buy-in and ownership
- Provides common vision and language
- Provides clarity of purpose and focus to everyone's efforts
- Guides decision making

# Strategic Planning Cycle



# Strategic Planning Components



# Strategic Planning Components

- Vision** What is the world we want to see?
- Landscape Analysis** What is happening in our world and where do we fit in?
- Mission and Values** What is our role and purpose in contributing to the vision?  
What values guide our decisions and actions?

## Strategic Planning Components

Strategic Issues	What are the key issues or opportunities that have the biggest potential impact for my organization?
Strategic Priorities	What are the key initiatives my organization needs to focus on to achieve our mission?
Action Plans	What are the specific actions, resources and timelines needed to test and implement the strategic priorities?
Performance Indicators	How will we monitor our progress, adapt when necessary, and measure our results?

9

## Strategic Planning Tools

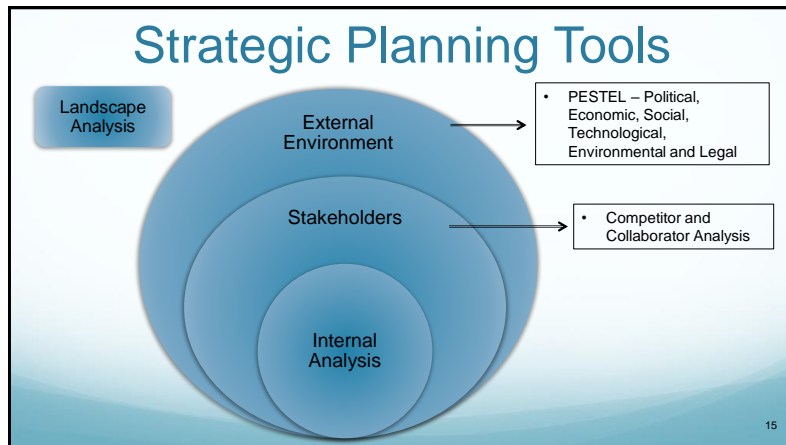
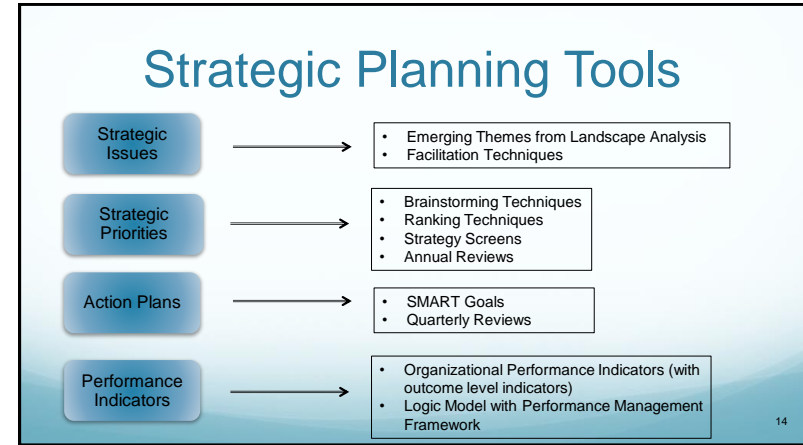
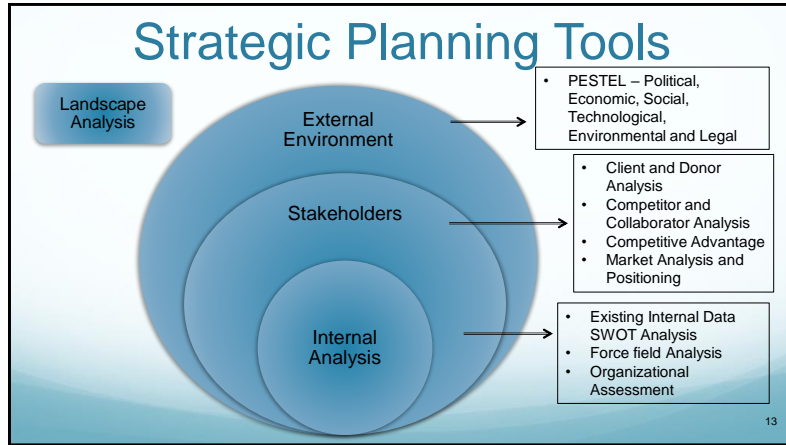
Prepare

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- Stakeholder Engagement
- Data Collection
- Project Plan

10





- ### External Environment Exercise
- PESTEL Analysis
    - What's relevant and emerging?
    - What does it mean for us?
    - What's likely and/or has a large potential impact?
- 16

## Stakeholder Analysis Exercise

- Competitor/Collaborator Analysis
  - What community needs are we trying to address?
  - What are our Core Competencies?
  - What other organizations are working in this space?
  - How do we compete/collaborate with them?

17

## Making it a Living Plan

### Board Level

- Strategic Issues and Priorities - a regular Board meeting discussion item.
- Board Sub-Committee that manages/oversees **planning processes** throughout the year.

### Organization Wide

- Stakeholder engagement in designing the plan.
- Provide a short, concise strategy document, easily digestible by staff and volunteers.
- Regular tracking and reporting on progress.
- Tie job descriptions and expectations to strategic priorities and performance indicators.
- Involve staff, volunteers, and partners on a regular basis, not just at planning time.
- Give permission/ encourage mechanisms that provide staff and volunteers opportunity to provide input and monitor the plan.
- Revisit/Update plan on an annual basis.

18

## Questions?

19

## References and Resources

Washington Nonprofit Institute

<https://www.wanonprofitinstitute.org/planning>

Know How Non-Profit

<https://knowhownonprofit.org/organisation/strategy/externalanalysis/circles>

Social Velocity

<http://www.socialvelocity.net/tag/nonprofit-competitors/>

La Piana

<http://lapiana.org/insights-for-the-sector/insights/strategic-planning/rtp-books>

20

# Thanks!

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21