


Board Leadership Calgary

Looking Past Tomorrow

Practical Strategic Planning

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Community Development Unit

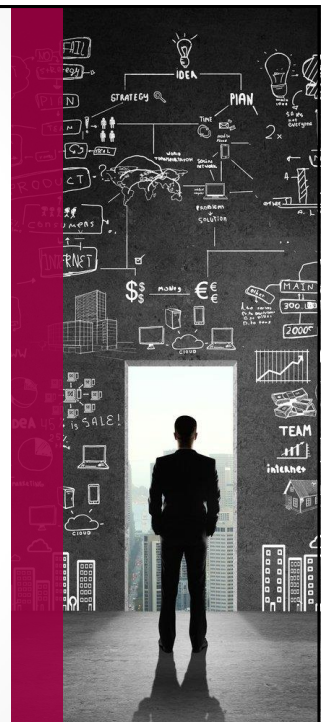
What do we do?

- CDU facilitators design and deliver services to strengthen and build capacity in organizations and groups specific to:
 - Strategic planning
 - Board Development
 - Planning and conducting effective meetings
 - Consultations with public and stakeholders
 - Identify, developing and enhancing partnerships and relationships
- Services are tailored to:
 - Community groups
 - Non-profit organizations
 - Municipal and provincial governments
- Community Development works to improve, enhance or and contribute in a positive way to the lives of Albertans.



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)
- Sets clear future direction
 - Provides roadmap to achieve vision and purpose of organization
 - Provides a forum to discuss the big picture and share perspectives
- Turns goals and strategies into formal, documented steps that can be implemented



Why Plan?

The Benefits of Strategic Planning



Benefits of Strategic Planning

- 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)

Components of a Basic Strategic Plan



Components of a Basic Strategic Plan

People may be aware of different terminology, but essentially:

- Environmental Scan
- Foundational Statements
 - Mission
 - Vision
 - Values
- Goals
- Outcomes
- Strategies
- Action Plan

Where does your 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**
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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



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 are you?**
 - **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 as a result of your organization
- Cornerstone of planning that is usually described in current language

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Foundational Statements:

Values Statements

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

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Vision, Mission, and Values/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/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.

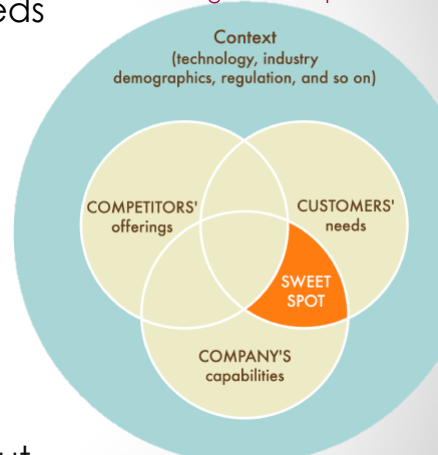
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Tips for Effective Foundational Statements

- Identify the "sweet spot" for your organization in comparison to your capabilities, client's needs and similar organizations' offerings
- 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

The Strategic Sweet Spot



(Collis & Rukstad, 2008; Rumelt, 2011)

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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?



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.)
 - Short or long term
- Programs, services, and resources should be aligned for the achievement of goals



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



Strategies and Action Plans



Strategy Formulation

Strategies are a plan of action designed to achieve a long term or overall aim

- 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 Plans

- Specific, detailed steps or activities to DO to accomplish the broader goal
- Who is responsible
- Time frame (start and finish dates)
- Resources required



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)



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

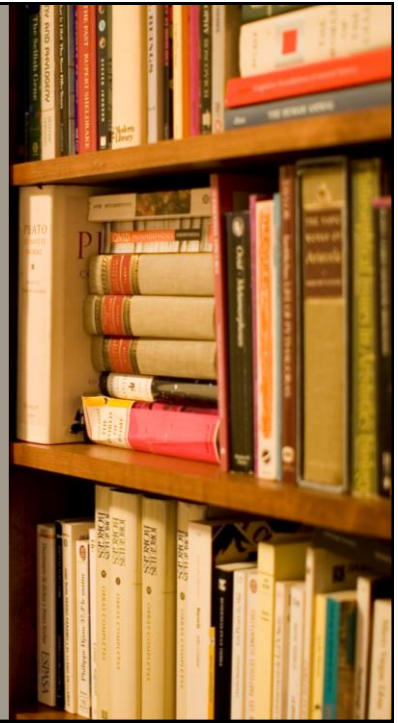


Indicators of Success

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

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?





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!!



Questions?

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