

Strategic Planning: Navigating the Road Ahead

Carmen Sparrow

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Carmen Sparrow MBA

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

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Learning outcomes

- Gain a greater understanding of strategic planning, its components and its benefits;
- Learn practical, simple processes and tools to create a living strategy that is adaptable and results driven;
- Integrate strategic thinking throughout the organization to build ownership and move towards your vision and mission.

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Strategic Planning

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

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Purpose and Benefits

Content

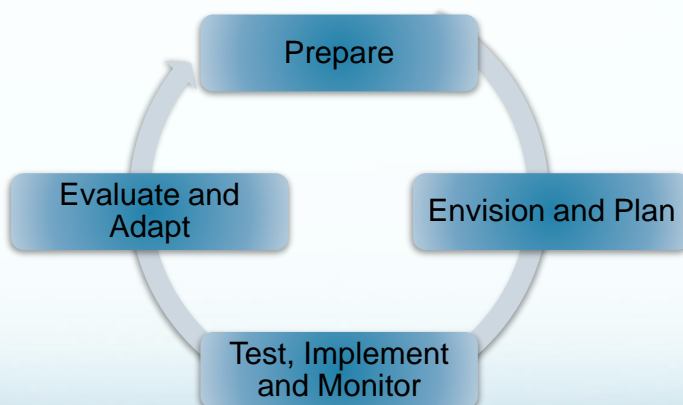
- Provides a roadmap through changing environment
- Turns strategies into actions
- Provides focus on priorities and helps to allocate resources
- Identifies what success looks like and measures it
- Identifies organization's role and contribution to larger community

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

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Strategic Planning Cycle



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Strategic Planning Components

<div style="background-color: #4F81BD; color: white; padding: 10px; border-radius: 10px; display: inline-block;">Vision</div>	<p>What is the world we want to see?</p>
<div style="background-color: #4F81BD; color: white; padding: 10px; border-radius: 10px; display: inline-block;">Landscape Analysis</div>	<p>What is happening in our world and where do we fit in?</p>
<div style="background-color: #4F81BD; color: white; padding: 10px; border-radius: 10px; display: inline-block;">Mission and Values</div>	<p>What is our role and purpose in contributing to the vision? What values guide our decisions and actions?</p>

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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?

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Strategic Planning Tools

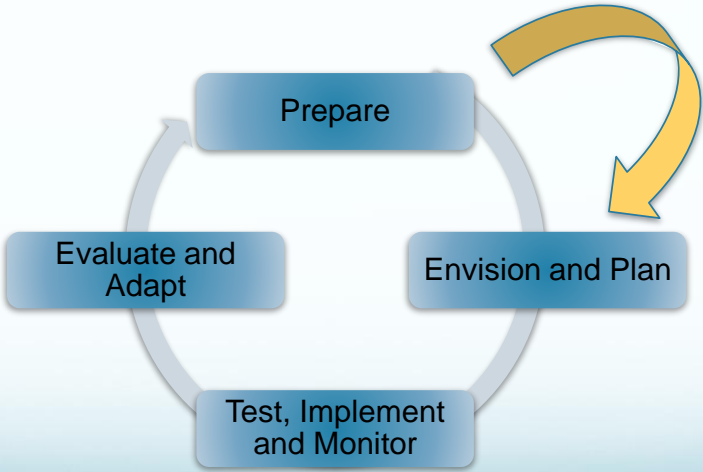
Prepare



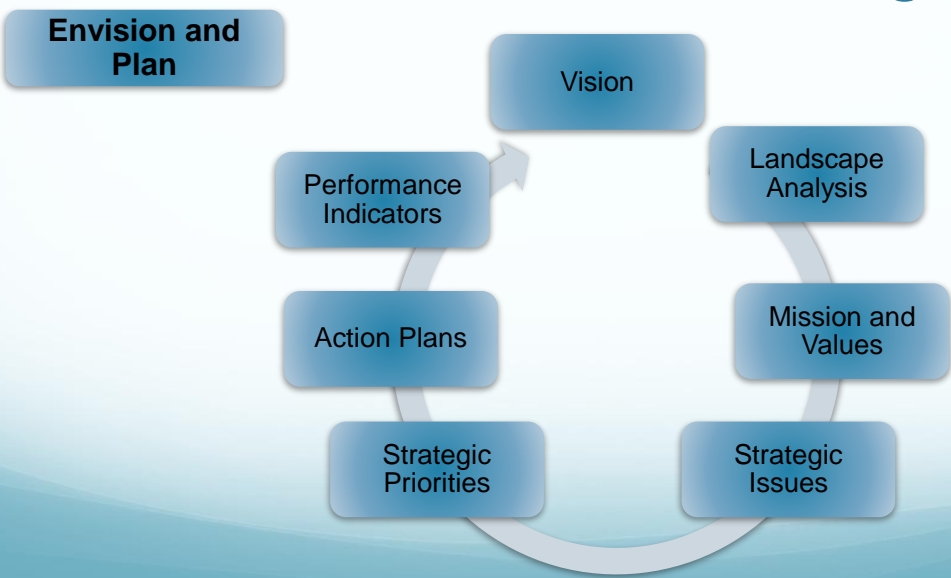
- Stakeholder Engagement
- Data Collection
- Project Plan

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Strategic Planning Cycle

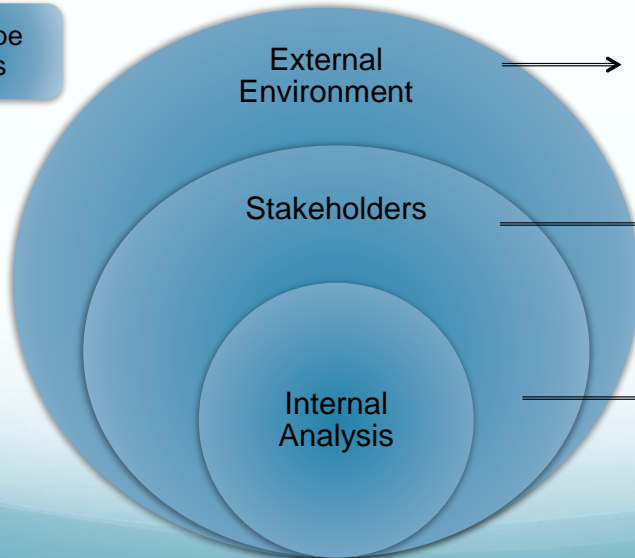


Tools for Each Stage



Strategic Planning Tools

Landscape Analysis



- PESTEL – Political, Economic, Social, Technological, Environmental and Legal
- Client and Donor Analysis
- Competitor and Collaborator Analysis
- Competitive Advantage
- Market Analysis and Positioning
- Existing Internal Data
- SWOT Analysis
- Force field Analysis
- Organizational Assessment

Strategic Planning Tools

Strategic Issues

Strategic Priorities

Action Plans

Performance Indicators

- Emerging Themes from Landscape Analysis
- Facilitation Techniques
- Brainstorming Techniques
- Ranking Techniques
- Strategy Screens
- Annual Reviews
- SMART Goals
- Quarterly Reviews
- Organizational Performance Indicators (with outcome level indicators)
- Logic Model with Performance Management Framework



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?

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?

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Making it a Living Plan

Board Level

- Strategic Issues and Priorities - a regular Board meeting discussion item.

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.

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Questions?

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References and Resources

Washington Nonprofit Institute

<https://www.wanonprofitinstitute.org/learning/planning/spin-interactive-graphic/>

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/rtsp-books>

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Thanks!

Email: clsparrow@shaw.ca

Tel: (403) 988-6204