

Board Leadership Calgary

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Getting Started with Strategic Planning

Theory + Practice

Welcome



Components of a Basic Strategic Plan

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WHAT IS A STRATEGIC PLAN?

...and why should we bother?



Definitions of Strategic Planning

A Strategic Plan has the power to:

- **Focus and align** board and staff members, creating better results and increased momentum. It opens a conversation that may not be otherwise happening.
- **Connect and unify** your stakeholders — those individuals or groups that have an interest in the organization, including those people who benefit from your mission.
- **Give you the words to use with your key audiences** (like funders and partners) to bring them more powerfully into your work.

What is Strategic Planning?

Strategic Planning

- Visionary, inspirational and full of big picture ideas
- Push organizations to think beyond the day-to-day and create new strategies for advancing mission and driving change
- Addresses broad and overall direction.

Operational Planning

- Tactical, logistical, and full of detailed action items
- The 'how' to accomplishing your strategic plan
- Requires input from everyone involved in your operations
- Ongoing operational and infrastructural efforts

Why Plan?

DISCUSSION

- Why do you feel it is important that an organization formally “plans” and/or has a “plan” in place?
 - What are the implications of *not* having a plan?
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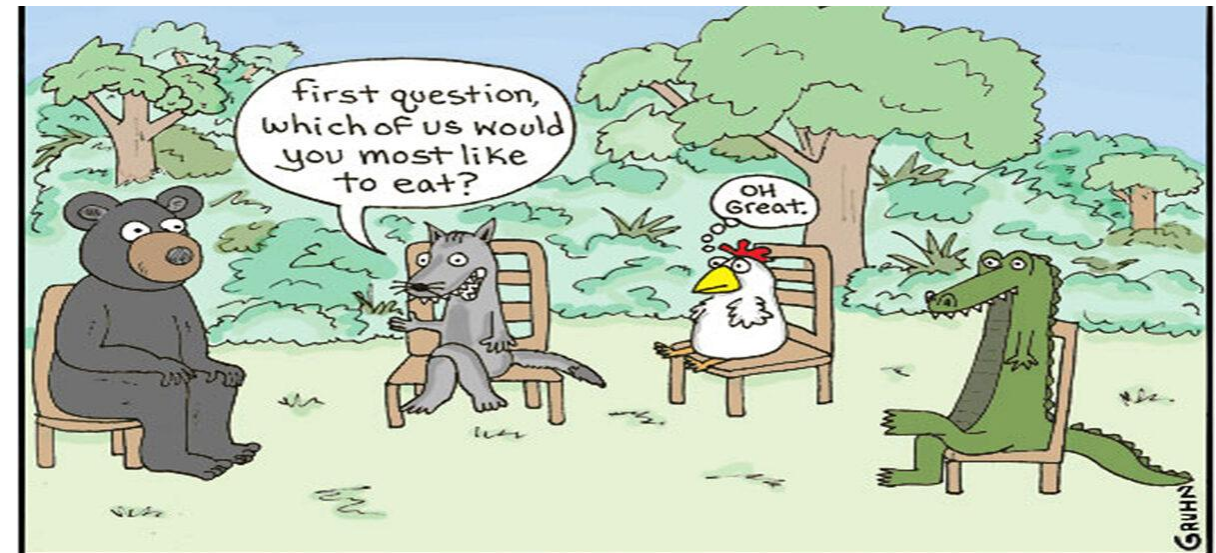
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- Turn and talk with your neighbour
 - Discuss both questions
 - Be ready to share your discussion highlights in 5 minutes

Benefits of Strategic Planning

- Sets clear future direction
- Identifies what success looks like for an organization
- Enhanced perceptions of legitimacy
- Provides continuity in direction and leadership in times of rapid member turnover and improves change management efforts
- Builds ownership, commitment, and purpose
- Improved progress tracking and measures success

How to Conduct your Strategic Planning

- In-person Strategic Planning
- Strategic Planning Retreat
- Virtual Planning
- Multi-group Strategic Planning



Ice breakers in the wild

Roles in Strategic Planning

From a Board Perspective

Anticipate and lead, instead of reacting

Makes many individual decisions more easily in keeping in line with broader goals

Having a framework to work better together

Bringing common purpose and effective coordination, spending more time on high level organizational things

From a Staff Perspective

Aligning budgets, work plans, and people power to accomplish priorities

Coordinate – pull in the same direction

Having a basis of trust because they know what the Board supports

Making more progress and investing time productively because they know what the collective wants to achieve

Board Role in Strategic Planning

- Setting **direction** for the organization
- Building **ownership** for the work the organization does
- Ensuring you meet your **fiduciary duty**
- **Better understanding** of the work of the organization
- Better relationships and work with staff – **clarity in roles** and responsibilities
- Position to **monitor** strategic plan progress, learn, and adjust

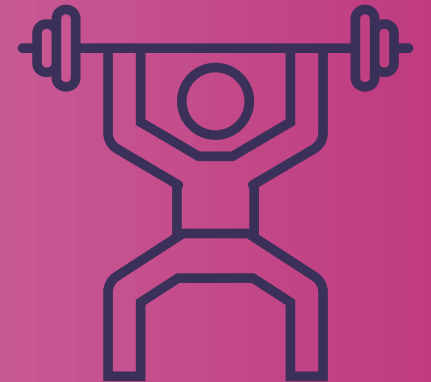


A BASIC STRATEGIC PLAN

Environmental Scanning

Three definitional points:

- ✓ The practice of **systematically** exploring and interpreting the internal and external environment...
- ✓ To better **understand** the trends and drivers of change...
- ✓ ...and their **impact** on your organization.

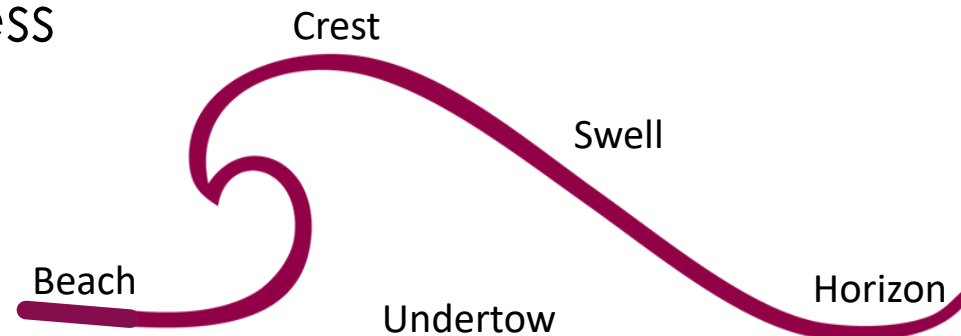




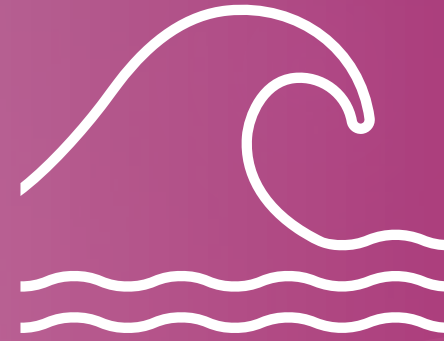
- Identifying and creating a list of factors that impact your organization and those you serve is only the first step.
- The important part is reflecting on which factors will impact your organization and/or your members and which ones will challenge your relevancy as an organization in the future.
- You can prioritize those factors and decide on a few that you will focus on in your strategic planning

E-Scanning Tools/Methods

- Historical Scan
- SWOT
- PEST (variation of)
- Wave Process



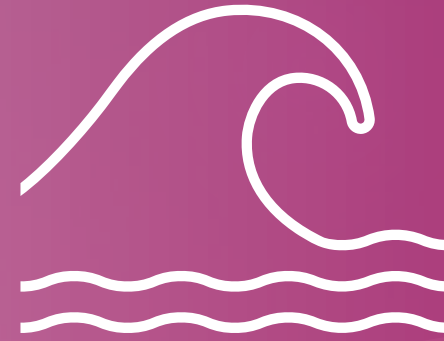
Wave Process



What is it?

- Quick way to reveal everyone's interpretation of current reality with objective clues and form a common story about current reality
 - This exercise uses a Wave as a metaphor to categorize everyone's perception of the reality
 - Participatory process to help a group analyze its current environment to plan realistically for the future.
 - Prompts participants to consider new and innovative ways of operating, as well as thinking about 'old habits' that they may need to let go of
-

Wave Process



What is it?

- **Surf:** What's at the peak to ride out?
 - **Crest:** What's happening right now?
 - **Swell:** What's building momentum?
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- **Beach:** What's washing up on the shore?
- **Undertow:** What are the deep patterns causing trouble? What caution is needed?
- **Horizon:** What's emerging on the horizon?

SWOT Analysis



What is it?

- Enables groups in gaining deep insights into current operations and future potential, thereby empowering to navigate challenges effectively and capitalize on opportunities in their strategic plan.
- By understanding their SWOT, organizations can create strategies that capitalize on their strengths and opportunities and address their weaknesses and threats, ultimately helping them achieve their mission.

PEST (and variations)



What is it?

- A tool for looking outside of the organization to identify risks and opportunities. It provides a framework for understanding the external environment and identifying key drivers of change.
- A PEST analysis provides a foundation for strategic decision-making. It helps organizations align their goals, programs, and fundraising strategies with the external environment. This analysis ensures that decisions are informed, relevant, and responsive to the broader context in which the organization operates.

Historical Scan

What is it?

- This technique enables a group to review and bring forward significant events from its past, build upon the strengths of its present, and create a roadmap for its future.



Activity: PEST Method

Activity

- ***Use PEST as topics for discussion***

Political

Economic

Social/Cultural

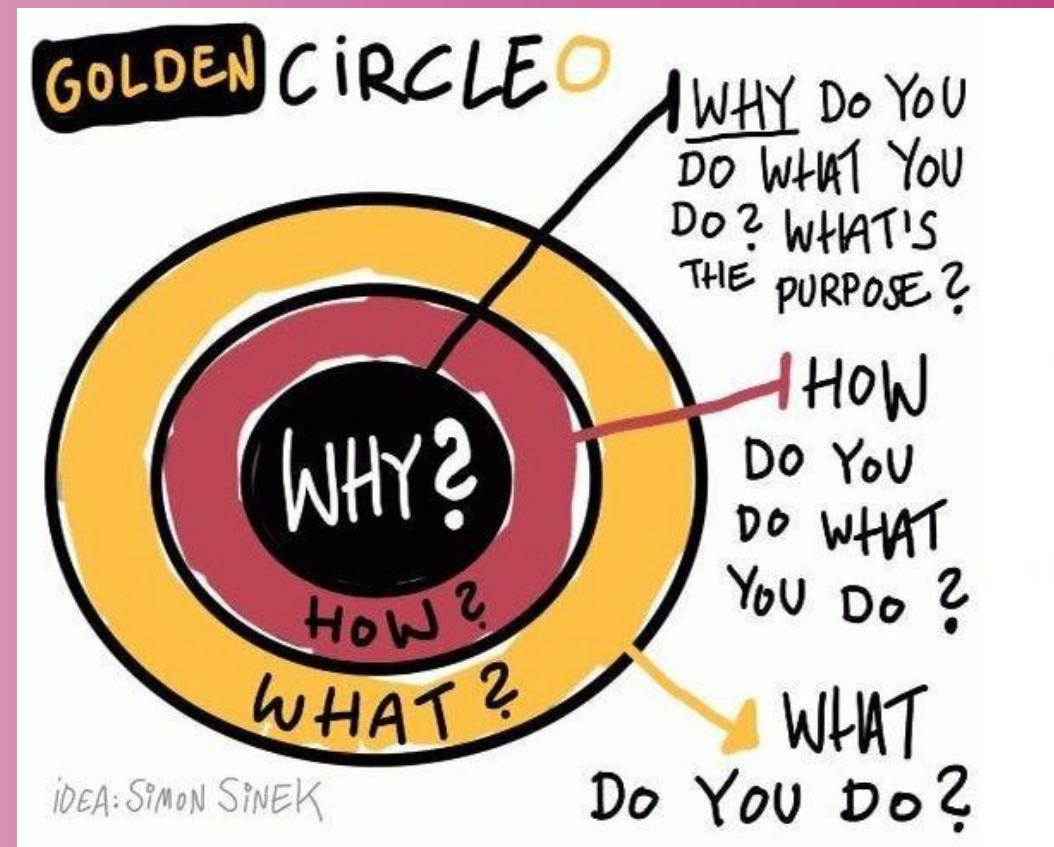
Technological

- ***In small groups, brainstorm trends and issues.***
- ***Be ready to share your discussion highlights in 7 minutes***

Purpose

Why discuss it?

- Helps define who we are as an organization
- Summarizes what our organization is about and the value we bring
- Can be adapted for marketing and planning efforts at all levels of the organization
- Can instill an emotional and rational impact of the work the organization does.



Foundational Statements

- Commonly called **Mission, Vision, and Values statements**
- 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, Values in Planning

Mission:

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

Goals/Strategies
Action Plan

Vision:

Desired future state and ultimate achievement

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 to carry out the organization's mission and goals.

Foundational Statements: Vision

Vision Statement

- Describes the ideal state of what the future looks like for the community you serve
- Used to lead the organization in achieving quality results

Vision Statements should be:

- *Clear and simple*
- *Easy to communicate*
- *Short enough to fit on a t-shirt*

Vision Statements

The Vision Statement Does Not:		The Vision Statement Does:	
<ul style="list-style-type: none"> • Include verbs - e.g., "Working towards, Creating, Endeavoring to" 	<ul style="list-style-type: none"> • Describe the actions of the organization 	<ul style="list-style-type: none"> • Describe the ideal state that the community of people will experience 	<ul style="list-style-type: none"> • Describe an ideal future in your group's mind's eye

Questions to Ask Ourselves			
<ul style="list-style-type: none"> • Is it inspiring- filled with passion and conviction? 	<ul style="list-style-type: none"> • Can you see it? Does it use words that create a clear, vivid picture in your mind's eye? 	<ul style="list-style-type: none"> • Will it motivate people to give their all and commit to make it a reality? 	<ul style="list-style-type: none"> • Does the vision reflect a compelling description of desired future state?

Drafting Vision Statements

- Vision statements answer:
 - ***What needs to be changed and why? What is our dream end-state? What would success look like?***

Habitat for Humanity: A world where everyone has a decent place to live.
Ducks Unlimited Canada: Clean water and healthy wetlands for all waterfowl, wildlife and people.
Food Banks Canada: A Canada where no one goes hungry.

Foundational Statements: Mission

Mission Statement

- Describes the purpose for the organization or why the organization exists – true identity
- Describes what makes the organization unique
- Answers questions:
 - **What** you do (your organization's purpose)
 - **Why** you do it (adding value to the community)
 - **Who** you do it for (who your organization serves and where)

Mission Statements should be:

- Concise (one sentence)
- Outcome oriented
- Inclusive of the goals and people who may become involved in the organization

Mission Statements

- Who you are
- What you do

- How you add value
- For who and (optional) where

Fresh Start is a partnership initiative of faith-based organizations in the community of Anytown, Alberta that works to decrease homelessness and break the cycle of poverty by providing job and life skills training to homeless men and women in rural Alberta.

On the Go provides older adults in Anytown Alberta with a location, information, programs and services that encourage active living in order to improve health, wellness and quality of life.

The Home Away Women's Shelter Society is a grassroots community organization that provides support services and emergency shelter to women and children in our community in order to protect them from harm and help stop the cycle of family violence.

Activity: Draft a Mission Statement

Activity

- *Develop a mock mission statement for a hypothetical organization*
 - **Who you are** and **What you do**
 - **Why you do it**
 - **Who you do it for**
-
- **Small groups – same groups as before**
 - **Use the hypothetical organization provided**
 - **Be ready to share in 7 minutes**



Values, Beliefs, Guiding Principles

- Fundamental beliefs that guide actions, judgments, and decision-making
- What you stand for – as an organization and each person within it
- What are the values that guide our work?
What do we stand for as an organization?

Values should be:

- *Specific behaviours and actions your organization lives by*
- *How we want to be seen by others*
- *Defined by how it is “meaningful” to our organization*

Why Develop Value Statements?

An organization's values are...

- The **essence** of the organization's message to its people and the public.
- An organizational environment of **common purpose and shared trust**.
- **Guidelines** for acceptable or unacceptable behaviours.
- The **motivation** to develop a vision for the organization's future.

"If you think of a vision and mission as an organization's head and heart, the values it holds are its soul." – Making Common Sense

Effective Foundational Statements

- The Board's role is to lead creation of foundational statements
- They should be clearly understood by those inside and outside the organization, simple and without jargon



Goals & Strategies

High Level (Strategic)

Detail Level (Operational)

The
“What”

Goals

- General
- Intangible
- Broad
- Abstract
- Strategic

The
“How”

Strategies

- Describe how we achieve our goals
- Approaches to get things done

Objectives

- Specific
- Measurable
- Narrow (but Actionable)
- Concrete (but Reasonable)
- Tactical (but Time-bound)

Tactics

- Activities
- Who will do what
- When things will happen
- What resources are needed

Strategic Goals

- Outcome based statements that describe what the organization hopes to achieve in order to move the organization closer to its vision, while working within its mission, values and beliefs.
- Key areas that your organization will focus on over a set period of time (focus your resources, energies, efforts, time, etc..)
 - *Short term or long term*
- Programs, services, and resources should be aligned for the achievement of goals

Drafting Strategic Goals

- Identifies **WHAT results** an organization wants to achieve
- Provides definition to an organization's purpose and structures their activities
- Brings alignment between the organization's strategic and operational activities

1. An Entity

2. A Verb in the present tense.

3. Statement (present) that brings together ideas & articulates the goal for the future.

Our organization

adequately trains

50 volunteers annually to support our clients

Activity: Drafting Strategic Goals

Activity

- What can be done in the next 3-5 years to achieve the mission/vision?
 - Where should efforts be focused?
 - Use the same hypothetical organization
 - Guided instructions by facilitator
 - Timing: Small Groups – 10 minutes
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- Explain **HOW** an organization plans to achieve its goals and objectives
- Broad approaches that encompass a set of actions or activities
- Should create or sustain an advantage
- Effective strategies promote a superior alignment between the organization and its environment and the achievement of goals

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



Action Plan

- ✓ Specific, detailed steps or activities to DO to accomplish the broader strategy
 - ✓ *Tasks to be done*
 - ✓ *Who is responsible*
 - ✓ *Time frame (start and finish dates)*
 - ✓ *Resources required*
 - ✓ *Outcomes – demonstration of success*
 - ✓ Consider organizational capacity, resources, risk and benefits
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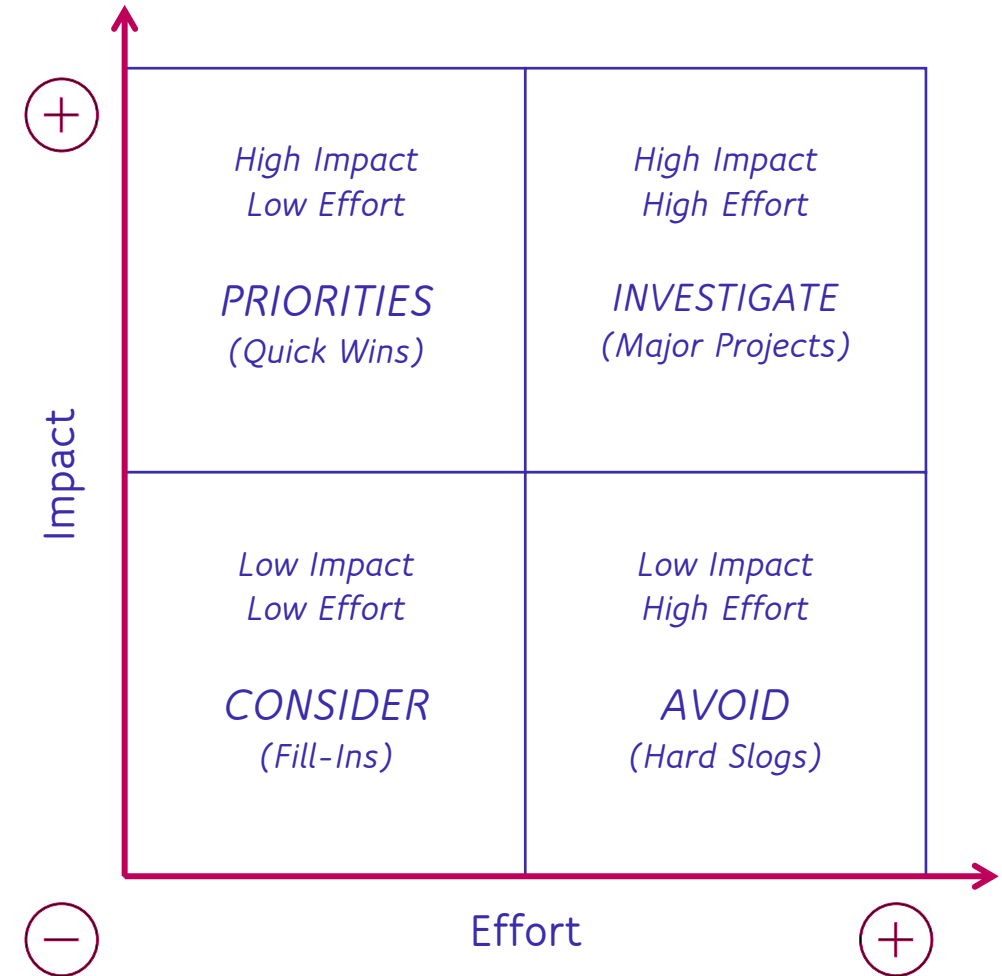
Example Action Plan

Goal:	Increase Sustainable Funding That Supports the Organization's Mission				
Strategies to achieve the goal	Tasks What needs to be done?	Person Responsible Who?	Time Frame When?	Resources With What?	Desired Outcomes We have succeeded when?
Research and develop alternate funding opportunities	Research grants aligned with our mission	CEO / Fund Development Coordinator	4 months (Nov-Feb)	grant databases, networks, funders	Identified 3 or more new options
	Apply for relevant funding options	CEO / Fund Development Coordinator	As needed Annually / Bi-annually	applications, funder support, grant writing training	submitted applications
	Generate ideas for alternative funding sources	Board / Fund Development Committee	3 months (Jan-Mar)	Facilitator, research of what others have done	Identified 2 or more new ideas

Making Decisions

Impact-Effort Matrix

- One available option
- Used to help priorities tasks based on potential impact and effort required
- Outcome = select solutions to be addressed with minimum effort and high impact



KEEPING THE PLAN ALIVE

Evaluation

- Monitor and Evaluate!! Build in regular Plan reflections and reviews
 - *How will we measure our plan?*
 - *How will we determine success?*
 - *How will we monitor our progress?*
 - Coming full circle – leads back to the development of a full plan
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Limitations of Strategic Planning

- 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

THANK YOU!

Any final questions?
