

CAFE 2024: Strategic Planning Master Class





Let's Talk

Hands up if you've ever participated in creating a strategic plan

Why Does it Matter?

- Sets direction, milestones
- Allows progress tracking
- Critical guidance to staff
- Risk mitigation
- Opportunity capture



Context

- For this discussion we're focused on NFP organizations that have members
- Principles are very similar

Agenda

1. Strategic Planning Principles
2. Preparing for Your Planning Day
3. On the Day
4. Executing Your Plan
5. Tips



The Principles

New plan every 3 years

Board, CEO create plan

Plan is documented

Planning Hierarchy

1. Vision, Mission
2. Strategic Plan
3. Business Plan and budget
4. Committees'/Task Forces' roles and goals

A hand is raised with fingers spread, palm facing forward, against a solid blue background. The background features several out-of-focus, light blue circular bokeh spots of varying sizes. The text is overlaid on the hand and background.

Let's Talk

Hands up if your organization has a vision and a mission

Keep your hand up if...

The Board's Filters

1. Vision
2. Mission



Mission, Vision

They provide high-level direction

- Mission: What we do
- Vision: What we aspire to



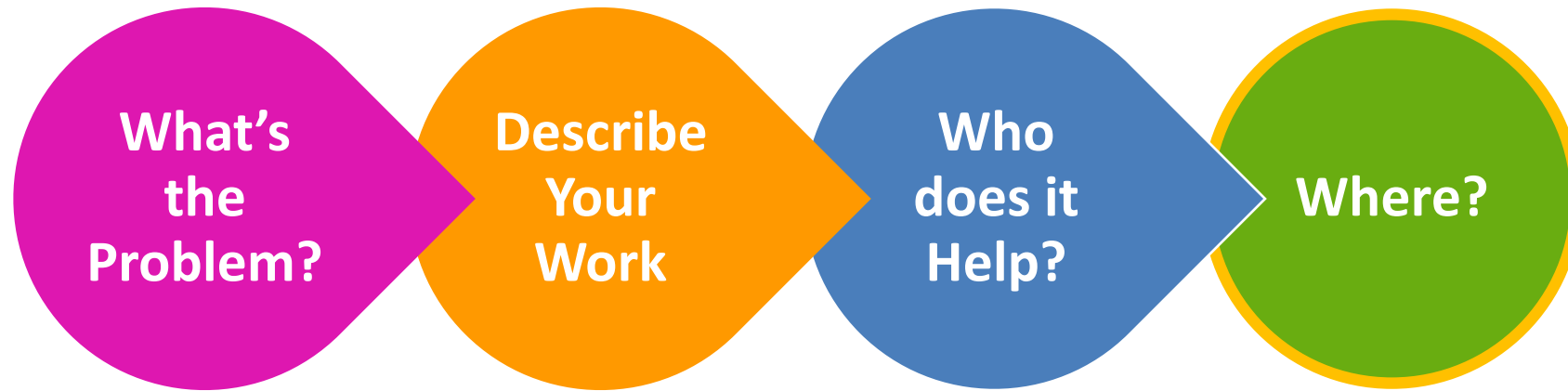
The Vision



Vision Statement Examples

- Ontario Bar Association: To be indispensable to our members, the legal profession and the administration of justice in Ontario.
- Habitat for Humanity: A world where everyone has a safe and decent place to live.

The Mission



Mission Statement Examples

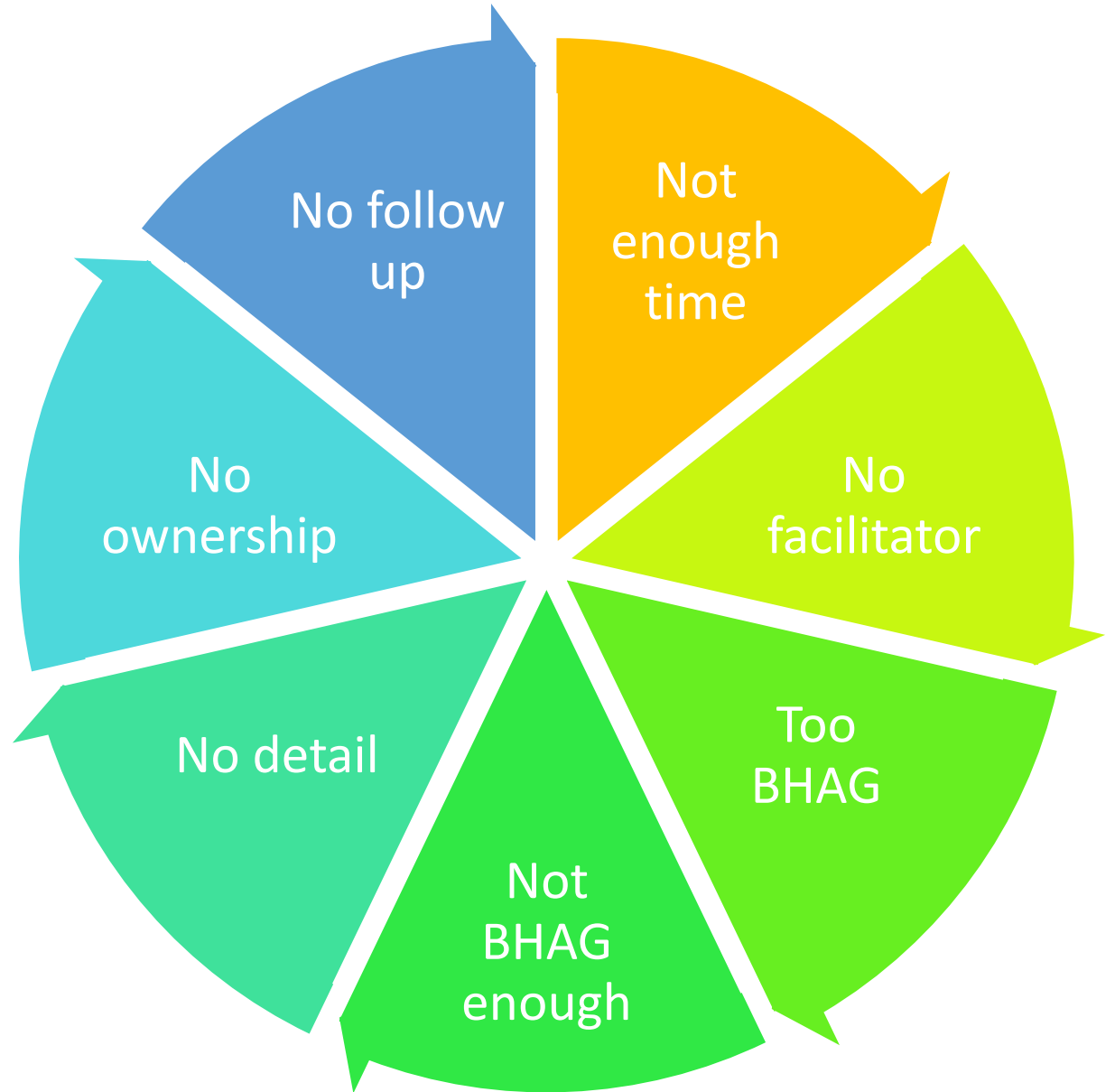
- ASPCA: To **provide effective means for the prevention of cruelty to animals** throughout the **United States**.
- Amputee Resource Foundation: To **disseminate timely and useful information, to perform charitable services, and to conduct research to enhance productivity and quality of life for amputees** in **America**.

Creating a Masterful Plan

1. Preparing for Your Planning Day
2. On the Day
3. Executing Your Plan



Common Omissions





Let's Talk

Who participated in your last strategic plan? Directors? All of them?
CEO? Senior management?

Preparing for Your Planning Day

Who?

- Directors – all
- CEO
- Senior management?



Preparing for Your Planning Day

Research? Survey?

- Member survey, focus group
- Environmental scan/SWOT
- Stakeholder consultation
- Staff consultation

Share results with directors, facilitator



Preparing for Your Planning Day

- Adequate time....??
- Facilitator – internal? external?
- Homework in advance



On the Day

1. Keep focused
 - Parking lot
2. Democracy – consensus
3. Ensure objectives are:
 - Strategic
 - Manageable (2-4)
 - Clear and specific
4. Identify what we should drop/postpone



On the Day

What to Avoid in Your Objectives?

- Ongoing activities
 - “Continue to...”
 - “Ensure that...”
- Overly broad initiatives
 - “Increase revenue...”
 - “Increase membership...”
 - “Improve efficiency...”



The Strategic Planning Process

1. Vision, Mission
2. Start the “long list”
 - Big picture visioning
 - Share survey/research results
 - Potential outcomes?
 - Impact on us/our members?
 - Any initial objectives?
3. Round 1 objectives
 - Rank each one via Vision...
4. Final objectives (2-4)
5. Details



The Strategic Planning Process

For each Objective – the details:

1. Why?
 - Connection to Vision
 - Expected/desired Outcome
2. Actions
 - Milestones, dates
 - Accountability
 - Pivot plan
3. Resources Required





Let's Talk

Any other details that you like to see in your strategic plan?

Executing Your Plan

- Formal approval by board
- Share with members
- CEO provides regular updates
- Use as a filter
- High level review (quarterly)
- Full review of strategic plan
- Staff are engaged**
- Committees are engaged**
- Board agendas**



Master Level Tips – The Staff

Preparing for the plan:

- Consider a full staff session w/facilitator
 - Ask big picture questions

Sharing the plan:

- Consider a “town hall” with the CEO
 - Present plan
 - Note where each group/division contributes
 - Answer questions
 - Discuss metrics, reporting



Master Level Tips – The Committees

- Consult with Chair
 - Mandate
 - Reporting
 - How?
 - When?



Master Level Tips – Board Agendas

- Calendarize Action steps to board meetings





Final Tips

- Make the effort
- Invest the resources
- Take ownership
- Keep it top of mind

Q & A

- Want a copy of the slides?
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