



HUDDLE #7

"Strategic Planning for Non-Profit Organizations - the 5Ws and more"

Brought to you by Sport Yukon
and
Yukon Government Sport & Recreation Branch



TONIGHT'S HUDDLE

Strategic Planning - The 5 W's and more:

Who should be involved?

What components are essential?

When – timelines and process.

Where – several places can be used.

Why is strategic planning important?

and more **How** your plan can be developed.

Goal for tonight's Huddle:

To share information and resources to help non-profit organizations navigate the creation of their new (or renewed) Strategic Plans.

Myths about Strategic Planning

What do you think.... TRUE or FALSE?

#1

- Most strategic plans should be at least 8 -10 years duration so you have time to implement the goals.

#2

- Every strategic plan must use the words goals and objectives to ensure good implementation.

#3

- Every strategic plan should be reflective of the mission, vision and values of its organization.

#4

- Strategic Plans always have to be approved by the membership at their Annual General Meeting.

#5

- There's no way a Board can do a strat plan on their own; so if they can't hire they won't have a plan.

#6

- It's super difficult to monitor implementation of a strategic plan. Where do you even start?

Myths about Strategic Planning

#1

- Most strategic plans should be at least 8 -10 years duration so you have time to implement the goals. **(FALSE)**

#2

- Every strategic plan must use the words goals and objectives to ensure good implementation. **(FALSE)**

#3

- Every strategic plan should be reflective of the mission, vision and values of its organization. **(TRUE)**

#4

- Strategic Plans always have to be approved by the membership at their Annual General Meeting. **(FALSE)**

#5

- There's no way a Board can do strategic plan on their own, so if they can't hire they won't have a plan. **(FALSE)**

#6

- It's super difficult to monitor implementation of a strategic plan. Where do you even start? **(FALSE)**

STORY: Goals and Objectives #2

A Strategic Plan is a high level document which describes:

- *who you are as an organization.*
- *where you want to be in X years.*
- *how you intend to get there.*

WHY IS A STRATEGIC PLAN IMPORTANT?

The Board has a fiduciary duty to ensure the successful future of the organization! No plan = No vision or plan for the future.

(Fiduciary means you are acting on behalf of another party = the membership)

- Provides a “map” to where you want to go
- Helps you focus & set priorities (RPAY example)
- Gives your staff direction
- Helps determine annual work plans & budgets
- Gives your organization credibility
- The process encourages creative solutions (Covid)

How can a Strategic Plan be used?

- To measure progress/success
- For Staff/Board evaluations
- As a recruitment tool! (Hey Jim, want to be on our Board?)
- To enhance procurement of funding \$\$\$\$
- To bring people together toward a common goal
- To minimize program loss due to staff turnover
- For Succession Planning
- To collect dust on the shelf? NO! NO! NO!

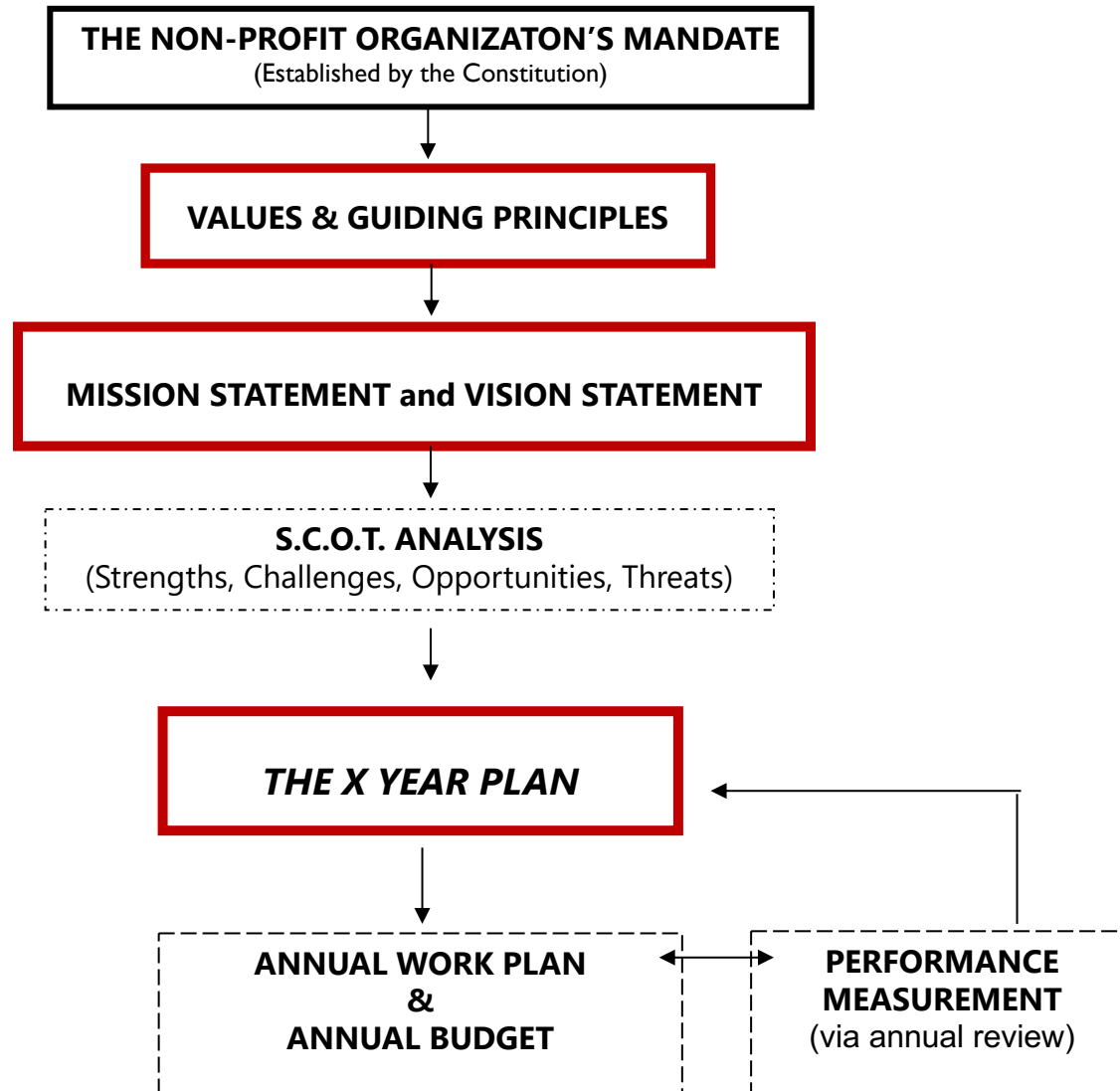
Current Trends in Strategic Plans

- Shorter in duration (3-5 yr. plan vs. 5-10 yr. plan)
- Very high-level (less detail on specific actions)
- Fewer high-level goals (= more achievable in time period)
- **Impacts, indicators, benchmarks** (what does success look like?)
- More concise, shorter, not so 'wordy'
- More visually appealing (photos, graphics, visuals)
- Used as a marketing tool (potential funders, etc.)

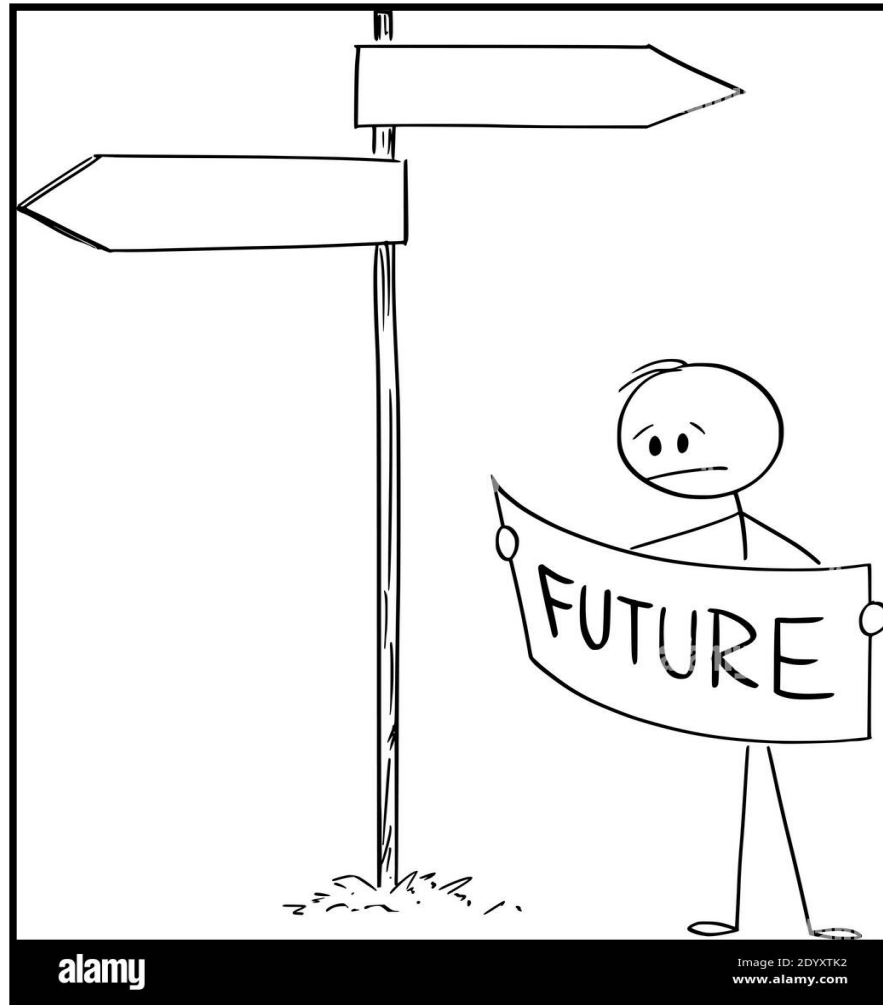
THINGS TO CONSIDER BEFORE YOU BEGIN

- If renewing, is the old plan still serving you well; is change needed?
- What financial resources are available?
- What will be the duration of Plan?
- Is the KISS principle important to you?
- What will be your timeline?
- Who will you invite to participate in the planning?
- Will you hire a consultant or a facilitator?
- Who will have input in to the draft plan?
- Have any new trends emerged since that may affect your plan?

WHAT ARE THE COMPONENTS OF A GOOD STRATEGIC PLAN?



SO, WHERE DO WE START?



START BY DEFINING “WHO YOU ARE”

Mandate

- Why your organization exists.

Core Values & Principles

- What you believe in & value.

Mission

- What you do, for whom and where.

Vision

- What you want the future to look like.

Note: A good facilitator usually won't start with the vision, unless the organization already has a vision that still holds true. **(Story: 1st Strat Plan Facilitation)**

THE MANDATE - DEFINITIONS

1. Authority given to an organization to carry out specific responsibilities.
2. A document giving an official instruction or command.
3. What an organization has been given authority to do.

What document defines the mandate of your non-profit organization?

NOTE: New Societies Act – Constitution does not require objectives

CORE VALUES AND GUIDING (OPERATING) PRINCIPLES

These are the sincerely held beliefs that guide the organization's path. To be effective they need to be relevant, meaningful and current.

Core Values are the fundamental beliefs of the organization; they describe or define the culture.

Guiding/Operating Principles, on the other hand, are more specific in how they guide the organization through everything it does. They are more prescriptive in nature.

Facilitation Q#1. What's so great about your organization?

Facilitation Q#2. What's important to your organization?



Examples:

Core Values:

- Active living is a cornerstone of health and quality of life
- We respect traditional cultures and values
- Access and equity is essential for all community members

Guiding/Operating Principles:

- Safety and Risk Management are paramount
- Education, awareness and training is essential for quality coaching
- We conduct our governance with integrity and transparency

THE MISSION STATEMENT

The mission statement communicates the essence of your organization to your stakeholders and the public.

A Mission Statement is typically a one or two sentence, clear and concise statement, that describes:

- **who the organization is**
- **what it does**
- **for whom and where.**

Note: In some cases, an organization will have a preamble introductory statement and will then keep the mission statement simply to “what it does”.



MISSION STATEMENT EXAMPLES

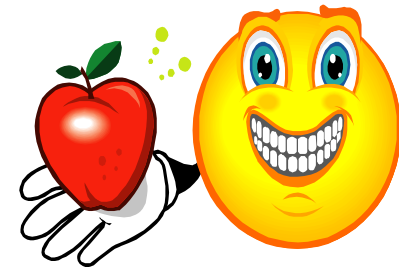
1. The Apex Community Centre is a human service agency providing everyday assistance, daycare, social services and recreational activities for low income children and families at risk in Pembroke, Ontario.
2. As stewards of the Canada 55+ Games, we oversee the successful delivery of high quality Games, offering a blend of events that are physically active and mentally challenging, while promoting the Games as an avenue which encourages active, healthy lifestyles for adults 55+ in Canada.

THE VISION STATEMENT

A vision statement should be a clear and motivating message about what your organization wants the future to look like.

Type 1: Ideal Organization

Type 2: Ideal World





TYPE 1: IDEAL ORGANIZATION

This type of vision statement describes the highest bar that your organization will always strive for; what success would look like:

Examples:

The Parry Sound Public Library will be the community's premier knowledge resource and a recognized leader in promoting reading as a lifelong activity.

The Jane Doherty Centre will be a Centre of Excellence in the provision of services to anyone who has experienced the effects of alcoholism.



TYPE 2: IDEAL WORLD

This type of vision answers the question:

What would a perfect world look like?

Examples:

We envision a thriving Yukon equine community, supported by the Equine Association of Yukon. (EAY)

We envision a Yukon where recreation and parks are essential and integral to quality of life; where all citizens engage in recreation experiences that contribute to physical, mental and social well-being and where recreation connects people to their communities and outdoor environments. (RPAY)

THE S.C.O.T. ANALYSIS MODEL...AN EXAMPLE

Internal	→	<p style="text-align: center;"><u>Strengths</u> (things you do well)</p> <ul style="list-style-type: none">■ excellent staff■ good products■ good Board leadership■ secure office space■ excellent credibility	<p style="text-align: center;"><u>Challenges</u> (things preventing you from doing what you need to do)</p> <ul style="list-style-type: none">■ some staff leaving soon■ lack of direction from Bd■ staff need training■ financial process no longer efficient
External	→	<p style="text-align: center;"><u>Opportunities</u></p> <ul style="list-style-type: none">■ new partnerships■ potential funding■ website designer to help■ saving costs by working with another NGO	<p style="text-align: center;"><u>Threats</u></p> <ul style="list-style-type: none">■ funding cuts■ change in funder priorities■ landlord selling rental space

STRATEGIC PLANNING PROCESS AND TIMELINES



** Unless it is written in Bylaws or Policy, the Strategic Plan is presented to the Membership, but does not have to be officially approved by the Membership, but has to be approved by the Board for implementation.

WHERE MIGHT YOU DO THE PLANNING?

“Where” - is about information gathering from participants:

Examples: Engaging participants at home:

- ✓ e-surveys (Survey Monkey)
- ✓ phone interviews
- ✓ email specific questions to focus groups and/or Board

Examples: Face to Face facilitation (keeping COVID in mind):

- ✓ Board workshop (with invited guests)
- ✓ Membership & Stakeholders World Café
- ✓ Public World Cafe
- ✓ Board retreat with good food!

Options for getting it done!*

Option #1

- Hire a consultant to do everything
- Survey, interviews, environmental scan, face to face workshop, write the draft, write the final with visuals. Most costly (less costly = no survey)

Option #2

- Board does all the information gathering
- Hires a facilitator for face to face workshop
- Board writes the plan (less costly) **(ERA Example)**

Option #3

- Board does the information gathering
- Board facilitates the workshop
- Board writes the plan (least costly option)

***2 potential challenges = financial resources and/or capacity of board members**

What about monitoring implementation of the plan?



(See Huddle #7 Resource #3)

HUDDLE #7 - RESOURCES

Resource #1: Strategic Planning Process and Timeline

Resource #2: Impacts and Indicators (Example)

Resource #3: Work Plan based on Strategic Plan (Example)

THANK YOU and GOOD LUCK WITH YOUR PLANNING

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