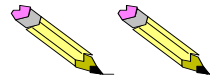


COMMUNIQUE

STRATEGIC PLANNING OVERVIEW

The Social Planning Council recently completed a new five-year strategic planning process. This project was graciously funded by the Ontario Trillium Foundation. To assist in this process, the following strategic planning overview was developed & shared with board and staff members as an orientation to the process.

What is strategic planning?



Strategic Planning is a management tool used to: help an organization focus its energy, to ensure that members of the organization are working toward the same goals, to assess and adjust the organization's direction in response to a changing environment.

<<http://www.nonprofits.org>>

Strategic Planning involves how a group defines its own Vision, Mission, Objectives, Strategies, and Action Plans (VMOSA). It is a practical planning process that can be used by any community organization or initiative, and is a comprehensive tool which can help by

providing a blueprint for moving from recognition of gaps in services or identified needs to actions to positive outcomes for the community.

<<http://ctb.ku.edu>>

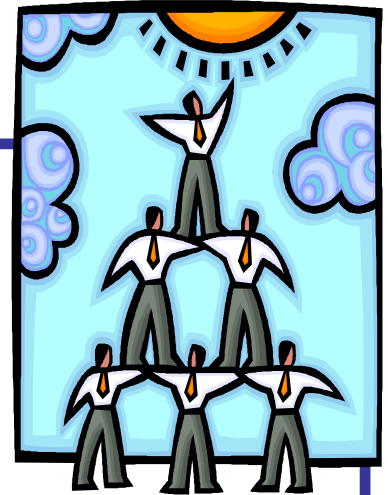
Strategic planning assumes that an organization must be responsive to a dynamic, changing environment (not the more stable environment assumed for long-range planning). A common assumption in the non-profit sector is that the environment is indeed changeable, often in unpredictable ways. Strategic planning, then, stresses the importance of making decisions that will ensure the organization's ability to suc-

cessfully respond to changes in the environment.

<<http://www.nonprofits.org/npofaq/03/22.html>>

When should you use a strategic plan?

- When you are starting a new organization
 - When your organization is starting a new initiative or large project, or is going to begin work in a new direction
 - When your group is moving into a new phase of an ongoing effort
 - When you are trying to invigorate an older initiative that has lost its focus or momentum
- <<http://ctb.ku.edu>>



Why use a strategic plan?

A strategic plan makes good ideas possible by laying out what needs to happen in order to succeed. It gives structure and direction to whatever project is approached. By creating this process in a group effort (taking care to involve both people affected by the problem and those with the abilities to change it), it allows an organization to build consensus around its focus and the necessary steps an organization should take. A strategic plan allows an organization to focus on its short-term goals while always keeping sight of its long-term vision and mission.

Strategic planning models



There are several models of Strategic Planning which include “Basic” strategic planning, issue-based (or goal based), alignment, scenario, and organic planning. The basic model is used most commonly and includes:

1. Vision Statement *(the ideal)*

Your vision communicates what your organization believes are the ideal conditions for your community

2. Mission *(the what and why)*

An organization’s mission statement describes what the group is going to do, and why it’s going to do that. i.e. “To develop a safe and healthy neighbourhood through collaborative planning, community action, and policy advocacy.”

3. Objectives *(how much of what will be accomplished by when)*

Objectives are the broad goals that refer to specific measurable results of the initiative. Objectives generally lay out how much of what will be accomplished by whom.

The three basic types of objectives are:

a. behavioural objectives - are objectives look at changing the behaviours

of people and the products (or results) of their behaviours.

b. Community-level outcome objectives - are related to behavioural outcome objectives, but are more focused on a community level instead of an individual level.

Your vision is based on your values & beliefs spelled out in your mission statement and achieved through your goals & objectives and accomplished by how you established your strategy

c. Process objectives - are objectives that provide the undergirding or implementation necessary to achieve your other objectives.

4. Strategies *(the how)*

Strategies explain how the initiative will reach its objectives. Usually organizations will have a wide variety of strategies that include people from all of the different parts, or sectors, of the community. These strategies range from very broad strategies that encompass people and resources from many different parts of the community to very specific strategies that take place on a much smaller level.

5. Action plan *(what change will happen; who will do what by when to make it happen)*

An organization’s action plan describes in great detail exactly how strategies will be implemented to accomplish the objectives developed earlier in the process. The plan refers to:

- a. specific (community and systems) changes to be sought, and
- b. the specific action steps necessary to bring about changes in all of the relevant sectors, or parts, of the community

The key aspects of the intervention or (community and systems) changes to be sought are outlined in the action plan. Action steps are developed for each compo-

nent of the intervention or (community and systems) changes to be sought. These include:

- Action step(s): What will happen?
- Person(s) Responsible: Who will do what?
- Date completed: Timing of each action step
- Resources required: Resources and support (both what is needed and what is available)
- Barriers or resistance, and a plan to overcome them Collaborators: Who else should know about this action?

Following these steps the action plan should be tried, tested and revised on an ongoing basis. This strategic planning process helps community groups define their dreams, set their goals, define ways to meet those goals, and develop practical ways to bring about needed changes. <http://ctb.ku.edu>



The benefits of strategic planning



Strategic planning serves a variety of purposes in an organization, including to:

1. Clearly define the purpose of the organization and to establish realistic goals and objectives consistent with that mission in a defined time frame within the organization's capacity for implementation.

2. Communicate those goals and objectives to the organization's constituents.

3. Develop a sense of ownership of the plan.

4. Ensure the most effective use is made of the organization's resources by focusing the resources on the key priorities.

5. Provide a base from which progress

can be measured and establish a mechanism for informed change when needed.

6. Bring together everyone's best and most reasoned efforts to build consensus on where an organization is going which helps to promote sustainability.

7. Provide clearer focus of organization, producing

more efficiency and effectiveness

8. Bridge staff and board of directors

9. Assist with board retention.

10. Allow planners to understand and share a common vision

11. Increase productivity through increased efficiency and effectiveness

12. Solve major problems

www.mapnp.org/library/plan_dec/str/plan/models.htm

Strategic Planning and the Social Planning Council of CND

The SPC's strategic planning process began in October of 2004 with a visioning exercise. Trillium funding was secured for 2005-2006 and a more extensive process was embarked upon. Several board-staff retreats took place and stakeholders were consulted for input. As well, material on social planning in general was collected and compiled. This information along with a brief description of our main working paradigms are now included in the board orientation manual (see manual for details).

New guiding documents have been developed including mission, vision, values, etc. (see website – www.socialplanningcouncil-cnd.org to view these documents). Seven strategic theme areas have been developed along with goals for the next five years. To remain strategic and responsive to our changing environment, objectives and activities to fit the goals will be revised on an annual basis at the spring board-staff retreat.

The organization has already gained through the implemen-

tation of a strategic planning process. The noted benefits to date include:

- A "road map" to show where the organization is going and how it will get there.
- The language is readily available to better communicate our role and expertise with those both inside and outside of the organization (for proposals, reports, etc.)
- Enhanced reporting tools have been created. The SPC's organizational chart has been revised to reflect the new strategic theme areas and monthly reports to the board now flow from this chart.



150 Main Street
2nd floor
Cambridge
Ontario
N1R 6P9

Phone: (519) 623-1713

Fax: (519) 621-6220

The SPC promotes the "democratization of data" to build a healthy community with active citizens involved in multi-sector networks and accessible organizations that work together.

The role of the SPC is to collect, analyze and openly share data on: community trends; demographics (current and projections); and best practices (local and beyond).

The Social Planning Council of Cambridge and North Dumfries is located in downtown Cambridge. Our office hours are Monday to Friday, 9:00 am to 4:00 pm.

WWW.SOCIALPLANNINGCOUNCIL-CND.ORG

Prepared by Jennifer Williamson, February 2005

Revised by Wendy Adema, September, 2006