

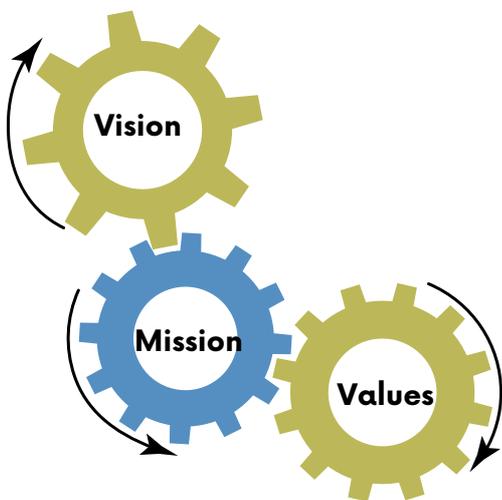
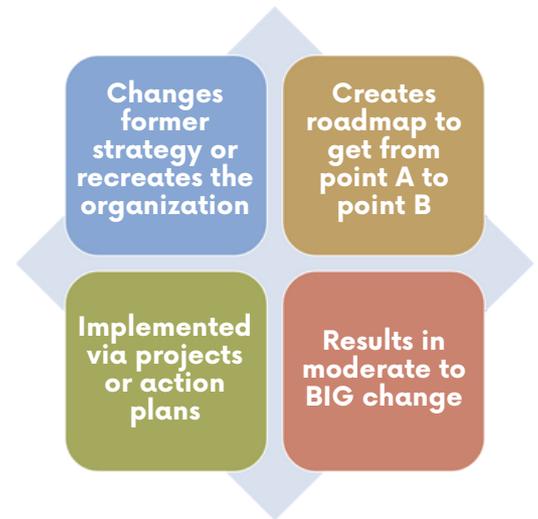


Strategic Planning

What is Strategic Planning?

Strategy is all about choices. Choices about where you will play (geographies, sectors, target groups), what you will do (services), how you will serve, and how your work will be funded. Strategic planning is about the sequencing of moves to help you achieve your long term vision, usually within 3 to 5 years.

All of these strategic choices are grounded in your **Vision**, **Mission**, and **Values**.



Vision: How will the world be different because of what you do? (Why)

Mission: What will you do to bring your vision to life? (How)

Values; What are the guiding principles and ideals that continue to shape your choices?

Recipe for Successful Strategic Change:



Legitimate need for change



A great strategy and action plan



Correct diagnosis of the task ahead



Broad and deep shared understanding



Strategic Planning

What should you consider before embarking on a strategic change initiative?

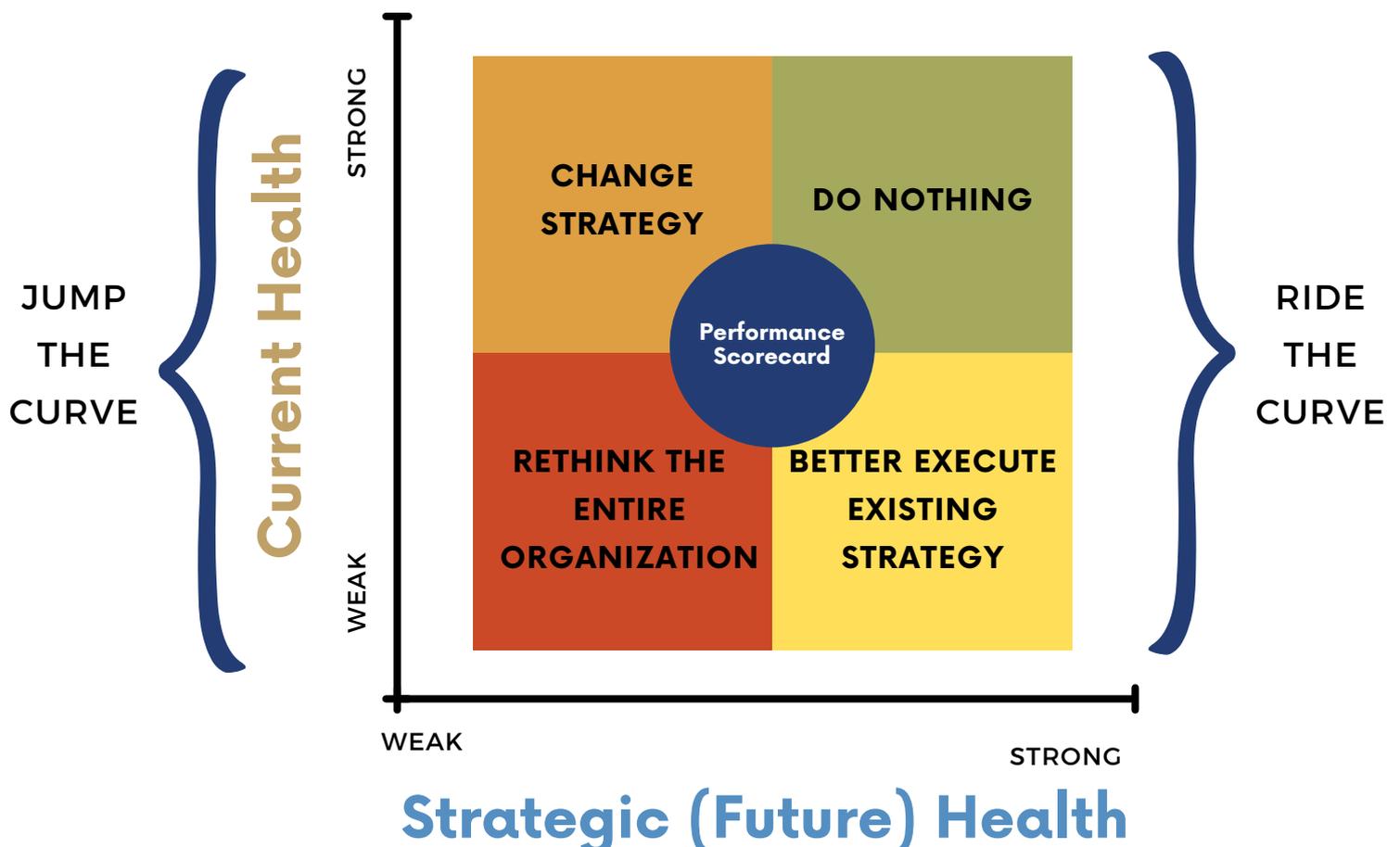
How is your organization positioned for the **future**?

Consider demographic changes, urbanization, competition, environment, politics, socioeconomic and technological trends.

How is your organization **currently** doing?

Consider organizational culture, services, staff, capacity (time, people, finances), quality of services, partnerships, funding, management.

Use the Performance Scorecard (adapted from Murray & Richardson, 2022) below to chart your organizational health and assess the most appropriate course of strategic action.



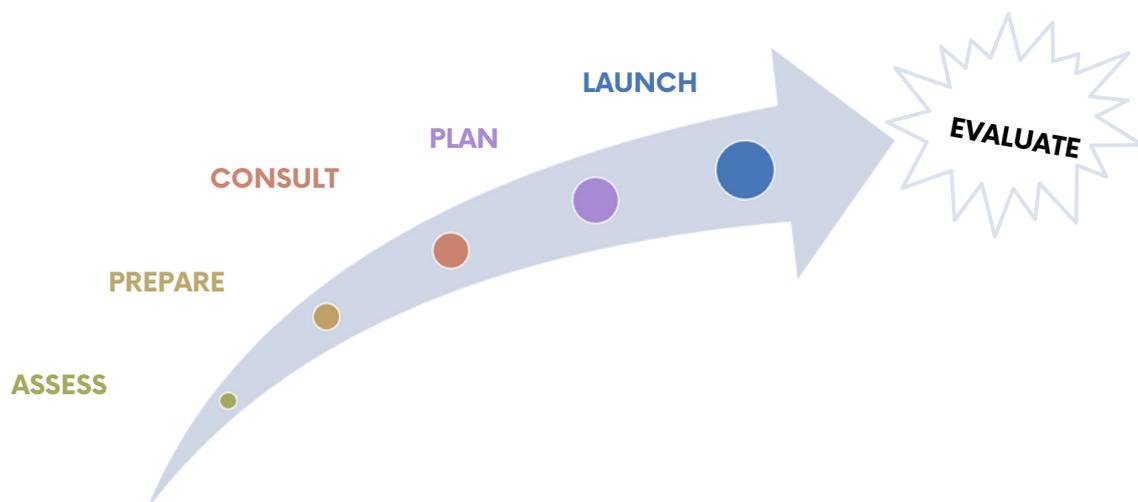


Strategic Planning

So, you've decided to embark on a strategic planning process. Now what?

While there might be a standard sequence to facilitate your strategic planning, the scope, activities and benchmarks in each step will be determined by your organization, its current needs, and desired outcomes. This is why our initial consultation is essential in helping us determine the best path forward.

In some cases, your strategic planning process might be preceded by other activities to help your organization be at optimal health before embarking on this major change initiative.



Through this strategic process, we will gather the necessary internal and external information to ensure all voices are represented in the process and create a plan that is well-informed and authentic to the needs of your organization.

The information gathered will help you gain clarity on strategic areas of focus, be prepared for what's ahead, set action plans and align all these choices with your vision, mission, and values.

My role in your strategic planning process is to be a facilitator as you tackle challenging conversations, make tough choices, and develop the strategy that will help you achieve your goals and vision.



Strategic Planning

Assess

We begin our strategic planning through the use of an organizational pulse-check survey, which will help us assess the satisfaction of how everyone in your organization is doing, how they perceive the culture and health of the organization. This is because **culture** plays a crucial role in the successful execution of your strategy.

Prepare

A foundational piece in your process is to ensure your organization has a unified and clear understanding of why you do the work (**vision**), how you do it (**mission**), and what are the **values** that guide it.

This stage is also about getting clarity on your planning context. This is typically done through an environmental scan to prepare for the political, economic, social, and technological changes that might be coming your way. It will also seek to match your current strengths, weaknesses, opportunities, and threats in response to your planning environment.

Consult

Involving internal and external stakeholders is key in ensuring that your plan gives a voice and active role to those it represents and impacts. This creates ownership and results in a more sustainable and effective strategic process.

Plan

Now that we've gathered the necessary data, we can begin making informed choices around your priorities, strategies, key actions, and resources needed to make your 3-5 year plan possible.

Launch

Your plan is ready to share internally and externally!

Evaluate

Revise annually to make sure you're still on track.