

An Overview of Strategic Planning

For Genesis: UJA Federation Centre for Jewish Innovation

Annex Shul - Camp Aim - Emet Education - Kulanu Toronto - Shoresh Jewish Environmental Program

By

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Purpose of Session

Condensing 2 day session into ½ day

- **Review key concepts of strategic planning**
- **Explore application of strategic planning concepts to your organization**
- **Provide strategic thinking support to each other**
- **Use framework for future explorations**
- **Have fun!**

What is Strategic Planning?

A structured, data driven process by which an organization wrestles with uncertainties and competing priorities to envisage and realize a desired future through setting long-term mission and sustainability goals, and identifying the central means for achieving them

What are the Risks of Strategic Planning?

- Time-consuming, taking up more effort than value generated
- If strategic directions are already clear, could substitute process and analysis for action
- If done poorly, could
 - demotivate key stakeholders
 - lead to worse decisions than just continuing on
 - surface unresolved conflicts

What are the Benefits of Strategic Planning?

- Leverage strengths, capitalize on opportunities and overcome weaknesses and threats
- Address burning issues
- Stimulate customer, leader, donor, and partner support
- Build momentum for desired change
- Focus, prioritize, mobilize and align decision-making, resource allocation and behaviour
- Strengthen Committees and staff
 - Energizes recruitment, retention and motivation
 - Creates accountability and performance goals
 - Enables professional development

Timing and Options for Strategic Planning?

When

- Every few years with a periodic update
- Response to a major challenge or opportunity

Scale

- Can be for overall organization, geographic area, department, program or even a major issue

Related Options

- *Strategic Directions* – less details than planning, particularly regarding implementation
- *Strategic management* – a culture of thoughtfully considering goals, and strategies in context of ever evolving context, organizational priorities and resources to make ongoing big decisions
- *Business Planning* – more detailed, shorter-term operational focus

Strategic Planning Activities

Design process

Assess external and internal context

- Goal & financial performance - Context & trends - What's working/not working
- Competition - Lighthouse Practices - Stakeholder perceptions - Market size - People

Crystallize strategic issues and options – based on major external opportunities and threats, internal strengths and weaknesses, define critical issues: provisional strategic directions and options; further research and consultation

Review/refine organizational vision, mission and values

Determine medium and long term goals, business model and strategic directions through further discussion, research and analysis, consultation and testing with key stakeholders

Prepare draft strategy recommendations for key customer facing, supporting and enabling business functions. Develop general implementation and resource plan and obtain feedback from decision-makers.

Incorporate input, formulate recommendations, flesh out implementation plan and gain approvals

Develop detailed implementation and communication plan

Implement, manage, monitor, evaluate and adapt

Key Elements of Strategic Planning



Design Process

Scope and Focus

1. Determine emphasis:
 - Goals, Scale/Scope, Business Functions, Burning issues
 - Time Horizon

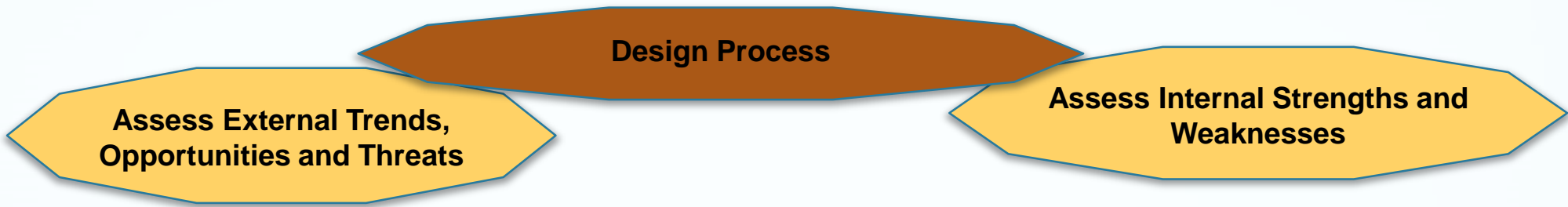
Approach

1. How much time to spend on vision, mission, values and when?
2. How rigorous and comprehensive – e.g., in regard to data collection, consultation and option development
3. What is the balance between open-ended exploration and hypothesis testing/persuasion approaches?

Resourcing and Roles

- 1 How long should be the planning process?
- 2 How many financial and personnel resources should be invested?
- 3 Who are the key players and what are their roles in developing and approving recommendations (e.g., Board, Executive Committee, Other Committees, Senior Professional, Departments, other Staff)
- 4 What are the links to other processes (e.g., budget, evaluation, annual meeting, major decision/event etc.)

Key Elements of Strategic Planning



Illustrative External & Internal Trends

EXTERNAL MACRO CONTEXT	EXTERNAL ORGANIZATION ECOLOGY	INTERNAL
<ul style="list-style-type: none">-Global economy-Local economy-Labor markets-Technology-Regulation & Govt.-Environment-Culture-Jewish religious and cultural dynamics, philanthropy	<p>Goals, needs, wishes, trends, and views of organization's stakeholders (current, past, prospective)</p> <ul style="list-style-type: none">- Customers- Partners- Donors- Suppliers- Alumni	<ul style="list-style-type: none">-Leadership-Organization design-People numbers, competencies, human resource processes-Governance system-Web, technology-Business processes-Funding-Facilities

Stakeholders and Consultation

WHO – Current, Former, Prospective

Customers, beneficiaries and their intermediaries

Board members and Committees

Senior and other staff

Customer Feeders to/from

Suppliers and Partners

Funders and supporters

Regulators, other players in the sector, competitors

Academics, consultants, experts, leading practitioners

Community leaders

Media

Types of Stakeholder Insights
Stakeholders can offer perceptions of context and trends, organization (what's working/not), suggestions re services, and provide feedback on proposed strategies.

Iterative consultation

Consultation = Marketing

Methods of Consultation Include

Online surveys

Individual interviews

- Phone

- In person

Group interviews/focus groups

- Phone

- In person

- Online discussion

Town Halls

Observation

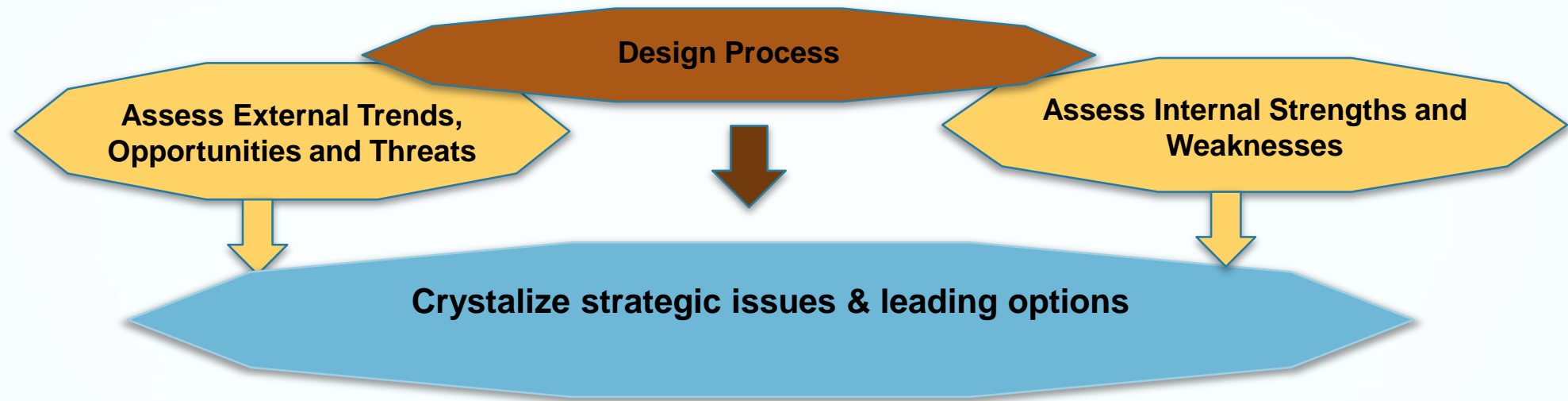
Invitation of written feedback

Review of documents

Expert review

Benchmark Comparison

Key Elements of Strategic Planning



Criteria for Assessing & Guiding Strategic Options

- ✓ Alignment with vision, mission and values
- ✓ Impact on financial sustainability
- ✓ Return on investment
- ✓ Affordable
- ✓ Upside opportunity
- ✓ Low/manageable risks
- ✓ Feasibility
- ✓ Key stakeholder support
- ✓ Adaptability
- ✓ Evaluable

Assessing & Developing Strategic Options

CRITERIA

Alignment with vision, mission and values * *Financial sustainability*
Return on investment * *Affordability* * *Upside opportunity*
Low risks * *Feasibility* * *Stakeholder support*
Adaptability * *Evaluability*



Deconstruct & combine

Generate Strategic Options

Focus on Leading Options

Develop Recommendations

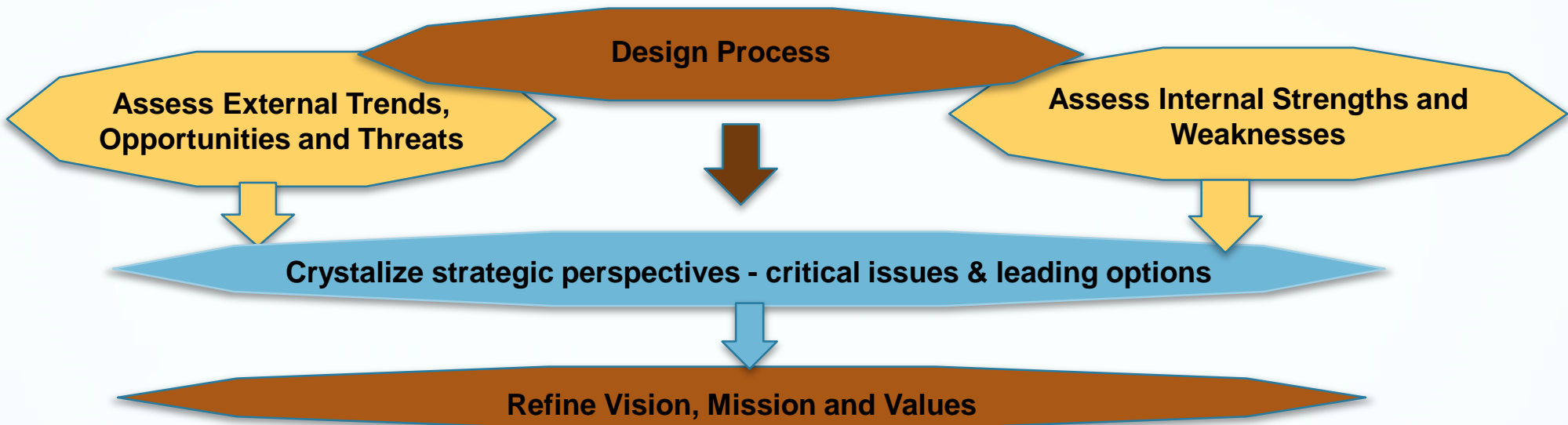
Develop Implementation Plan

Identify Key Issues

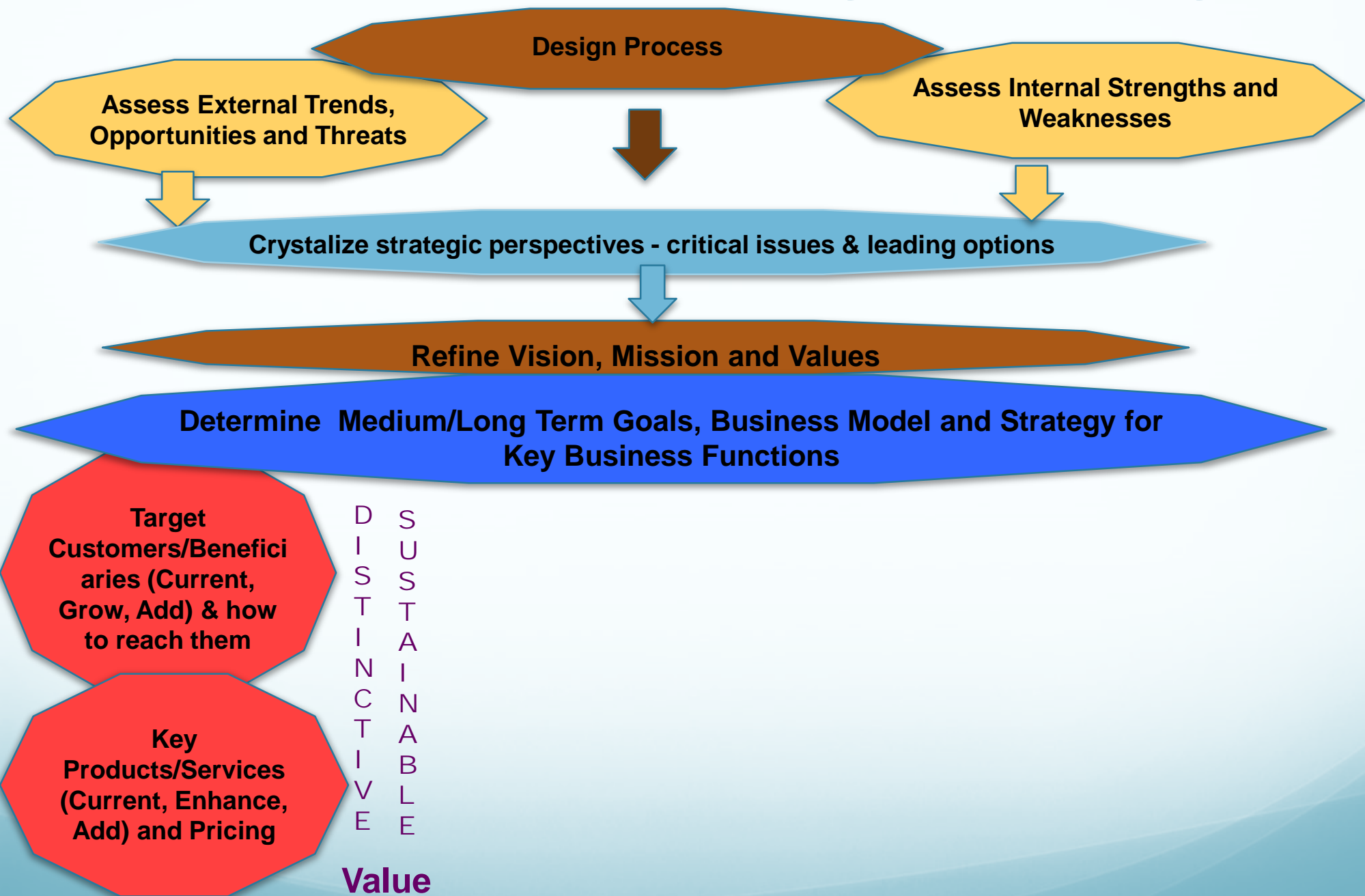
Major
Must be resolved
Unclear solution



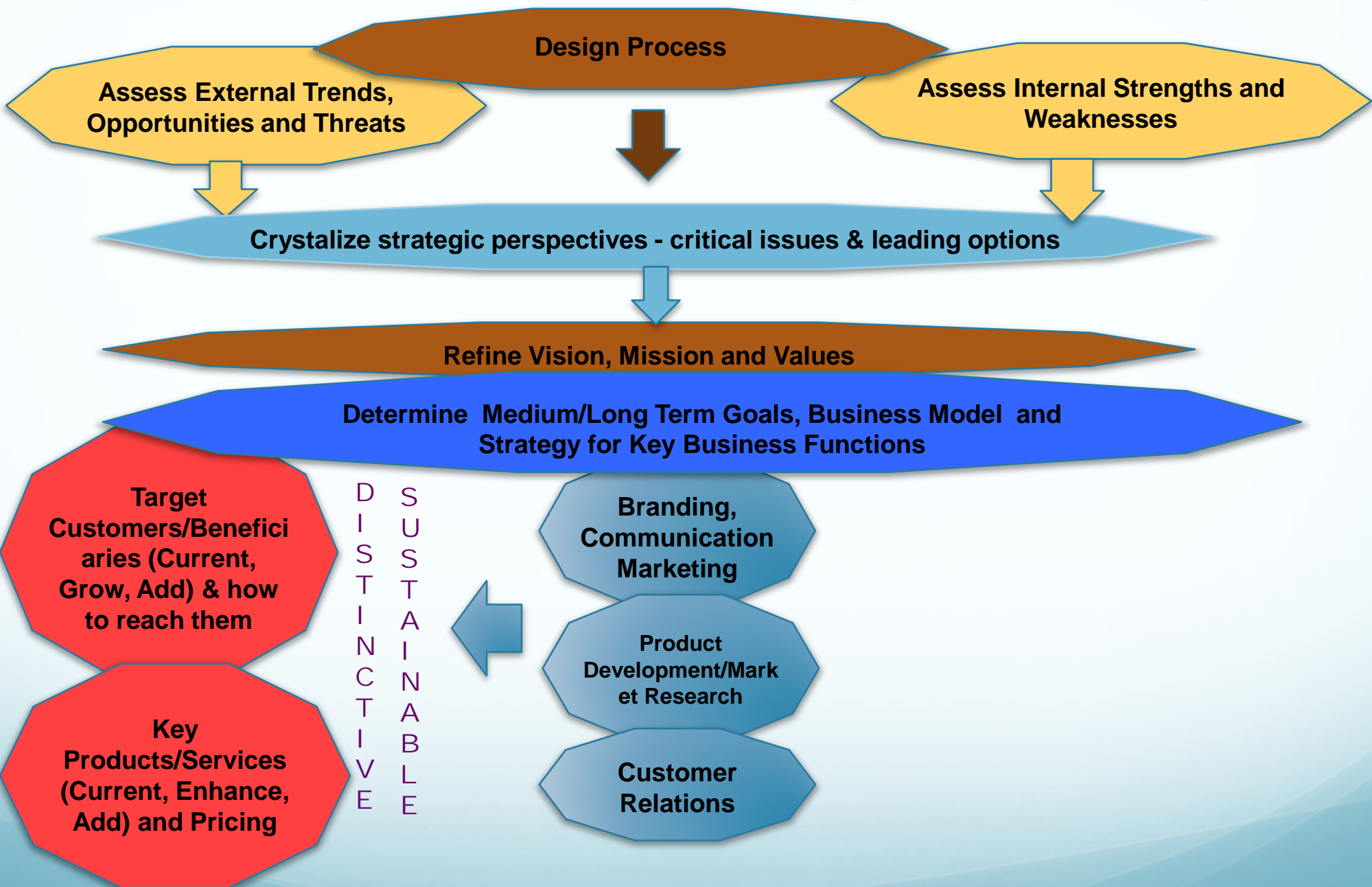
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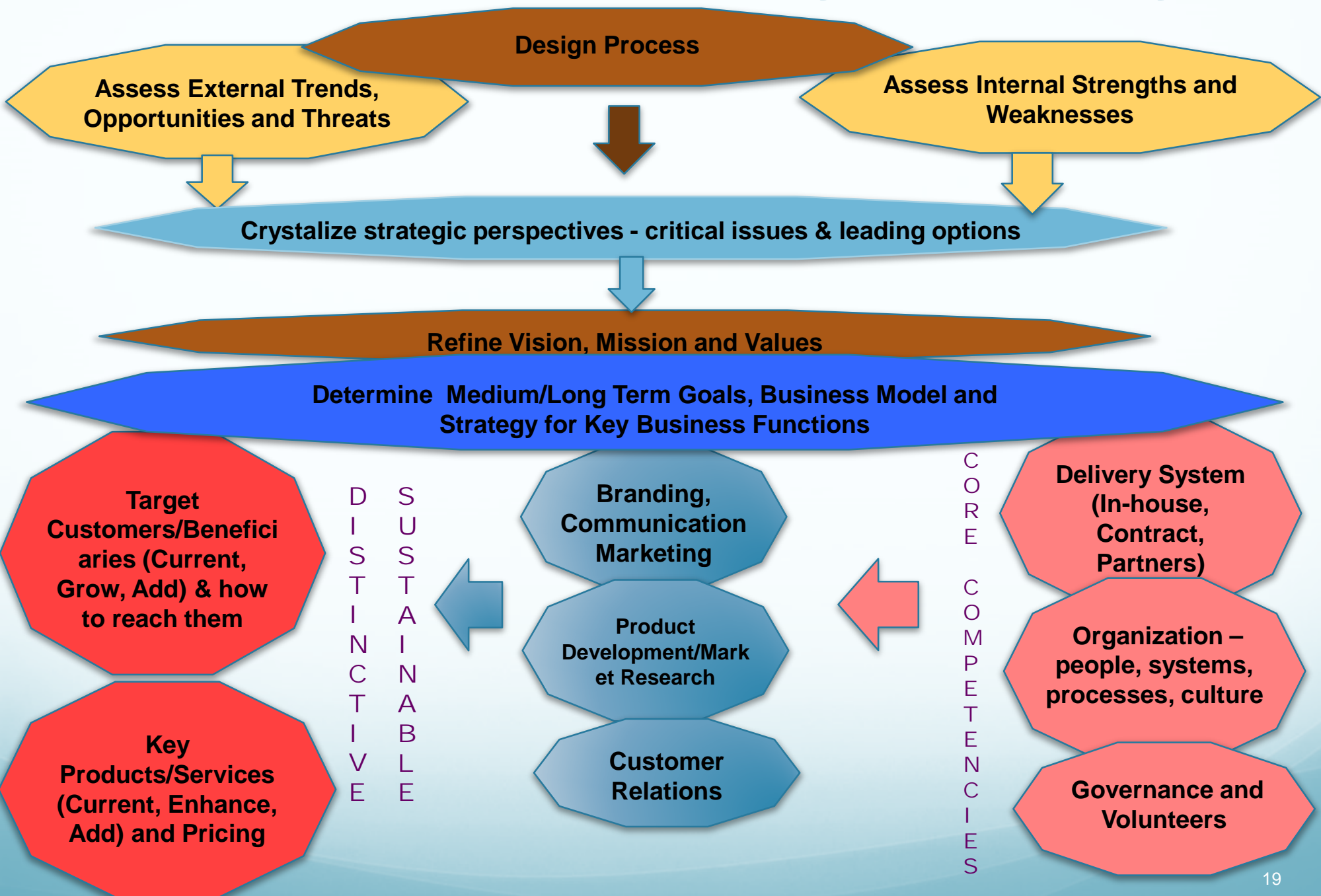
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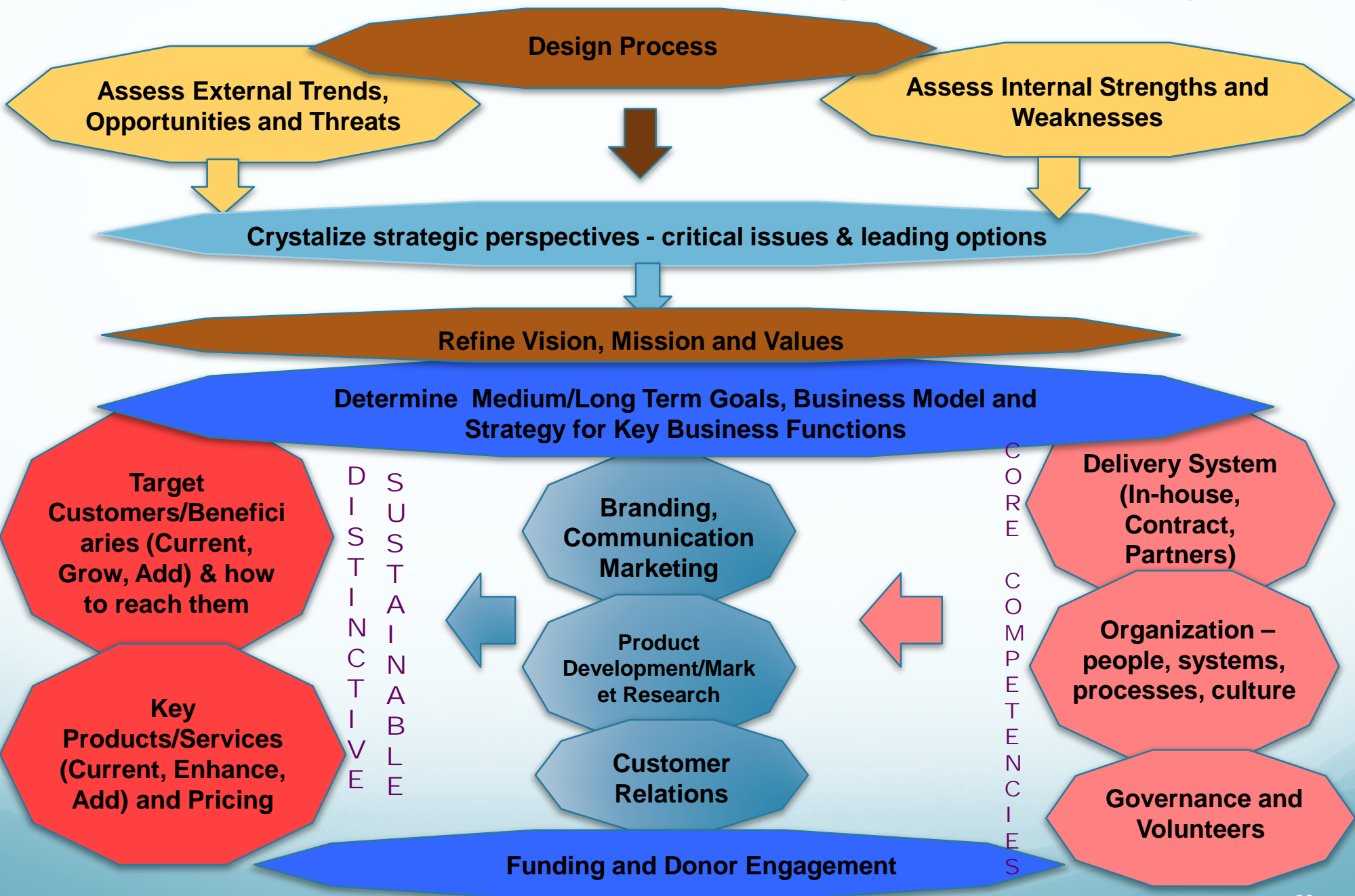
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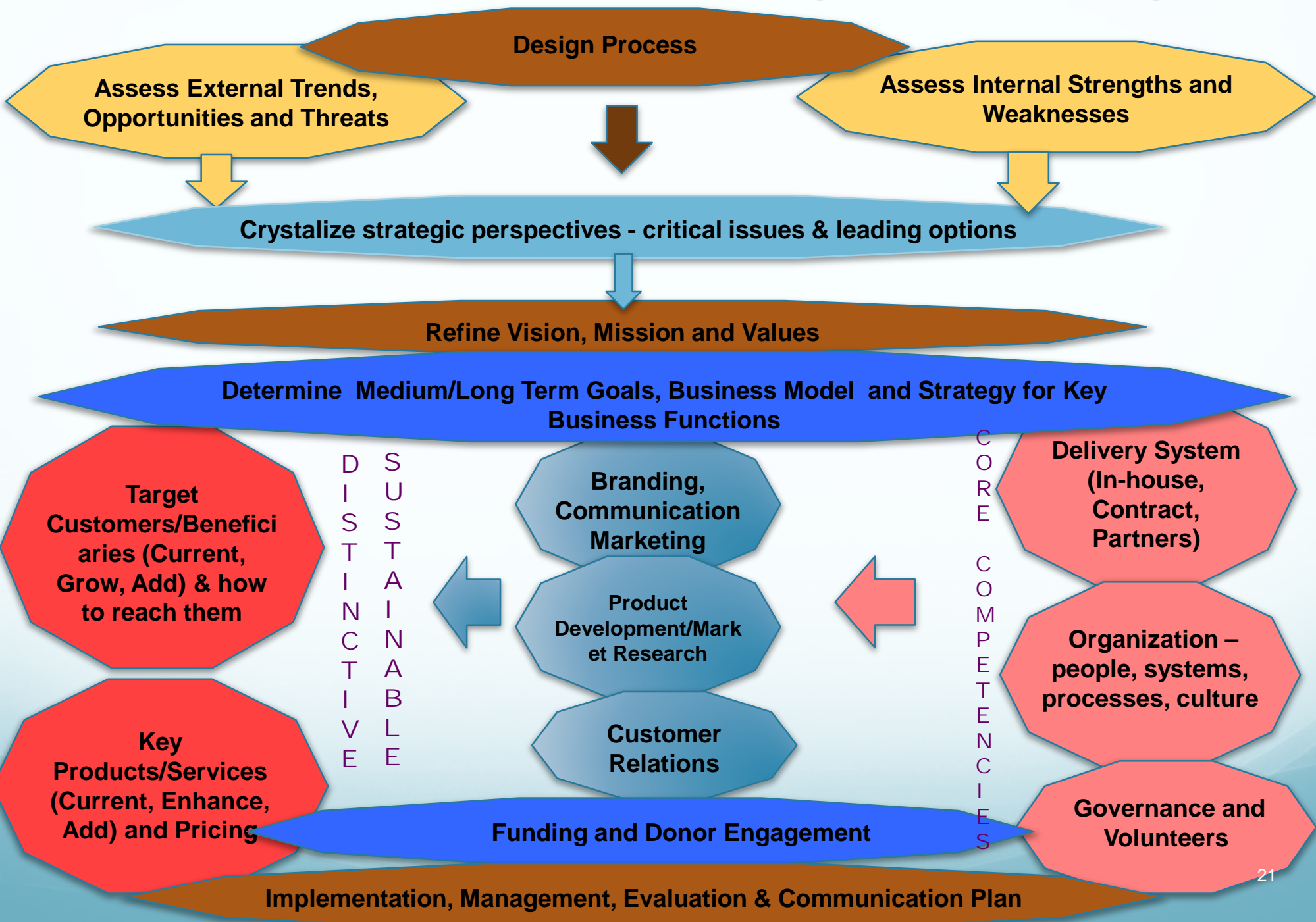
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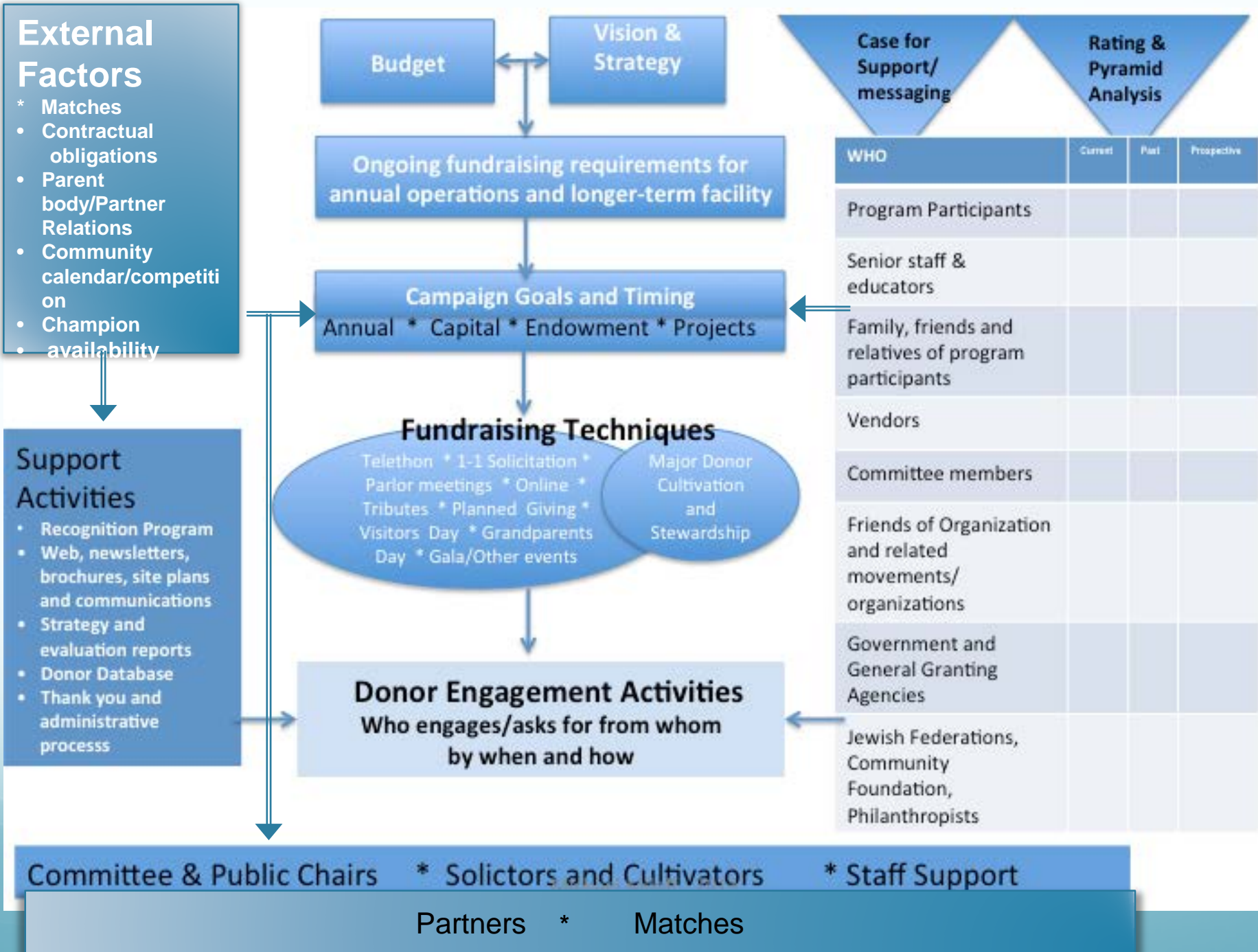
Key Elements of Strategic Planning



Key Elements of Strategic Planning



KEY FUNDRAISING ELEMENTS



Strategic Planning Tips for Non-Profits

- 1 Match process and expectations to resources especially staff and volunteer time**
- 2 Proactively design the process.**
- 3 Focus on central, long-term issues – get them on the table early**
- 4 Make sure to address any shorter-term burning issues**
- 5 Look 5 years out even if your plans have a 3 year time-frame. Prepare 3-5 year business model and budget projections.**
- 6 Make sure you take a form follows function, integrated approach to customers, services, other business functions and funding. Iteratively design solutions and obtain key stakeholder buy-in**
- 7 Be mindful of different problem solving and communication styles (e.g., regarding rigor and scope of analysis and consultation, degree of planning, data vs. intuition)**
- 8 Get different perspectives/voices on key issues – make sure you understand the perspectives of your customers, donors and leaders**
- 9 Consider using process to energize existing/prospective volunteers and donors**
- 10 Remember that collecting information from stakeholders is in effect marketing to stakeholders so be mindful of your brand and desired relationship in your consultations**
- 11 Ensure time and energy is set aside for developing an implementation, management and communication plan**
- 12 Use the final report as a living document to be reviewed regularly and seriously and adapted as required**