

The Secrets to Strategic Success

Strategic Planning for Small Organizations

Presented by Kim Pittaway for the Ontario Historical Society

What we will cover

- Goal: To equip you with a framework to engage in successful strategic planning for your organization—without committing hundreds of hours to the process!

We will cover

- 5 essential questions
- 7 important steps
- Closing the gap between “blue sky” and reality

Q1: What's your point?

- What do you hope to achieve with your planning process?
 - Set a road map for the next three years
 - Clarify what we do and why so that we can allocate scarce resources
 - Come up with a plan of attack for a specific issue or project and stay focused on that
- How will this align with your organization's mission and advance your organization's vision?
 - PS Do you have a clear mission and vision?

Mission, Vision, Values

- Mission: Your organization's purpose and key objectives. This is a statement about what you do.
- Vision: Your organization's goals and aspirations. This is a statement about what you hope to achieve.
- Values: The core beliefs that drive what you do
- If you do not have clearly articulated Mission & Vision, this should be your starting point.

Mission:

What makes you special?

- What does your organization do that no-one else does?
- What value do you bring to your community?
- What is your organization's purpose?

OHS Mission

- To promote among the citizens of Ontario the preservation and appreciation of their shared history and heritage
- To unite Ontario's historical societies and encourage communication and cooperation among them
- To encourage the formation of new historical societies and heritage organizations that promote the history of Ontario
- To undertake projects that encourage and develop the study, research and writing of history and the preservation of heritage in Ontario and to cooperate with individuals, societies, institutions and government agencies with similar goals

Vision: What is your dream?

- How will your organization improve your community?
- What is the deeper meaning/value of the work that you are doing?
- What goal or dream inspires you to continue doing the work that you do?

OHS Vision

We are Ontario's Memory

- The Ontario Historical Society supports and facilitates a province-wide network of groups and individuals who together give voice to Ontario's shared history and heritage.
- Ontario's future is not only enhanced but is enabled by an understanding of our shared past. The OHS values the shared history of our province, celebrating Ontario's significant achievements and citizens while seeking to bring the sometimes hidden histories of marginalized groups and communities to public attention.
- We believe that history is about more than built heritage. We believe that history encompasses the landscape and environment from which it emerges; the diverse peoples, perspectives, experiences and social contexts that shape it; the artefacts, cemeteries and built heritage that are often its public face; and the insights and understanding that emerge from its study.
- We have
 - Deep roots
 - Province-wide connections
 - Academic strength and rigour

Values:

What are your core beliefs?

- What beliefs and values underpin the way that you approach your work?

OHS Values

- Openness and inclusion
- Democratic citizen engagement
- Pluralism, equity and dignity for all cultures
- Inclusion and accessibility for persons of all abilities
- Transparency and financially accountable, exercising prudent fiscal management
- We uphold the value of peer-reviewed scholarly work through *Ontario History* and honour the work of those who publish, promote and support Ontario history and heritage through our Honours and Awards Program

Tip: Consider your audience

- Look to your peer organizations—where do you overlap? How do you differ? What best captures your particular and unique role?
- Consider the mission, vision and values of key funders—where do you need to align?

Back to Q1: What's your point?

- What do you hope to achieve with your planning process?
- How will this align with your organization's mission and advance your organization's vision?

Q2: What do you need to review?

- Is there any key research or background that will help to inform how you move forward?
 - Past strategic plans
 - Past grant or funding applications
 - Past grant or funding reports
 - Incorporation documents, by-laws
 - Detail on key projects (successful or otherwise)
 - Organizational history
- Can you (or someone) distill this into a background document?

Q3: Who can help?

- Board member, volunteer or ED to spearhead
- Committee?
- Consultant—paid or unpaid
- Meeting facilitator—someone who doesn't have a stake in the outcome
- Look for:
 - Community development workers
 - Resources from community foundations or other organizations
 - Volunteers/support from local businesses with strategic planning expertise

Q4: Who needs to be involved?

- You will get better buy-in if key players are involved in crafting the plan
- Your plan will be stronger if it is tested internally—including navigating disagreements and opposing views—before it is shared externally
- Create a list of contributors, and consider at what stages they should be involved
- Make sure you aren't avoiding anyone!

Q5: What's your process?

- Be clear with stakeholders about how you will proceed, who will be involved and at what stages, and what opportunities people will have for input and feedback
- Set clear deadlines. It's ok to adjust them if necessary—but ensure that changes are well communicated

7 essential steps

- 1. Consult
- 2. Draft
- 3. Review
- 4. Finalize
- 5. Approve
- 6. Execute
- 7. Follow up

1. Consult

- Provide background materials as necessary
- Help focus and frame your consultations around key questions
 - What are our strengths and how can we build on them?
 - What challenges do we face and how can we address them?
 - What specifically do we want to accomplish on Project X?
 - Are there opportunities for easy wins (low-hanging fruit)?
- Provide alternatives for input
 - Attendance at a facilitated meeting
 - Input via email, survey or questionnaire
 - Telephone conversations
- Consolidate your input
 - Recap in meetings to ensure you have captured accurately
 - Summarize in notes/memo format
 - LISTENING IS KEY at this stage

2. Draft

- Create the first draft of your plan
- Key elements:
 - Mission
 - Vision
 - Values
 - Your structure & programs
 - Articulation of the key challenges you face
 - Articulation of the key areas your strategy addresses
 - Specific goals within each area (with metrics where possible)
 - SMART: Specific, Measurable, Attainable, Relevant and Timely
 - Process for moving forward (next steps)

3. Review

- Circulate draft for feedback
- Consider alternative feedback opportunities
 - Meeting—Group/Individual
 - Email
 - Telephone/Skype

4. Finalize

- Integrate feedback
- Circulate for review again if necessary
- Create final version for presentation to your board

5. Approve

- Ensure you follow any by-laws or established policy guidelines in how you approve your strategy
- May be as simple as discuss and approve by the board

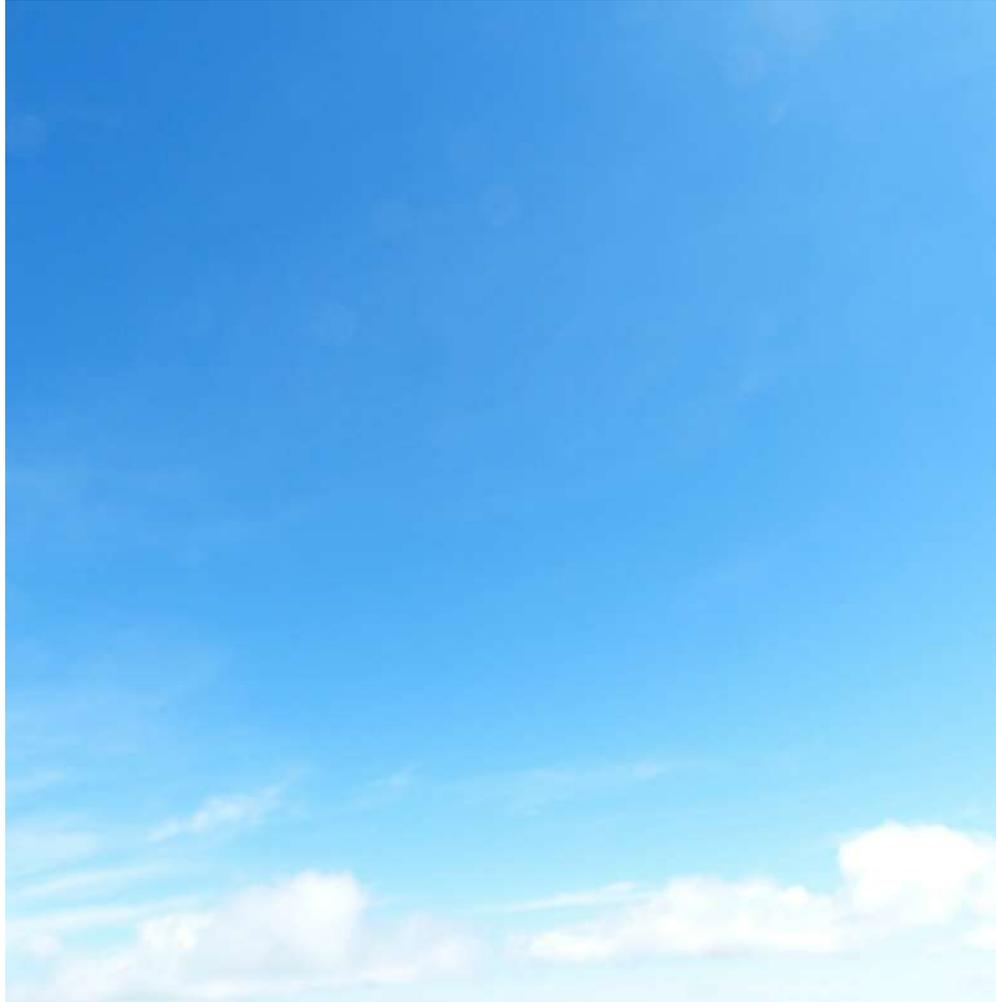
6. Execute

- Create a workplan to move forward on your specific goals
- Create committees/volunteer teams as necessary
- Designate someone to report back to the board—if everyone is responsible, no-one is responsible

7. Follow-up

- Accept that there will be instances in which you need to adjust your goals and strategies
- Ensure that there is good transparency and clear reporting back to the board when adjustment is necessary
- Create regular opportunities for check-in and update with your board
- When in doubt: Go back to the plan. Go back to your Mission and Vision

Blue sky



Reality



Reality-check at every stage

- Be clear about challenges and potential barriers
- Yes, be optimistic—but have a Plan B (and maybe a Plan C and D)
- Be realistic about what you can take on
 - Volunteer and staff time
 - Financial resources
 - Community resources
- Create a plan that stretches your team—not one likely to break them

Thank you!

- Questions?