

# Lunch and Learn - Strategic Planning for Community Leagues

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# Overview of Strategic Planning

Before we start- What is a Strategic Plan?

Strategic Planning is meant to clarify the purpose of an organization, where the organization wants to be in the future and how it is going to get there

# Before We Start...

## Its only “Strategic Planning” if...

- It involves strong input and support from organizational leaders
- Is produced after careful consideration of the effects of changes in the external and internal environments
- Is based upon the desired future of the organization
- Will influence the governance, leadership and operations of the organization
- It is cyclical

# Benefits of strategic planning

- Stimulate thinking to optimise the use of Community League resources
- Ensure Community League efforts are focused on a common goal
- Facilitate better control and evaluation of the League's activities and mandate
- Create awareness of obstacles that may occur well in advance so that they can be overcome through sound decision making
- Identify or adapt to emerging opportunities
- Ensure that creative thinking is used to solve potential problems.

# Developing a strategic plan involves: Development

1. Recruiting team members, including representatives from all stakeholder groups
2. Training, motivating and empowering the group to see how they will be adding value to the community
3. Understanding the history of the League, how it came into being and why it was established
4. Identifying things that the community does well, and what it does badly, and measuring these against the core values of the community
5. Imagining and understanding possible scenarios in the future, including demographic changes and impacts of the political, environmental, social and technological environment
6. Develop Goals- Describe a vision of the future using strengths and opportunities, while integrating threats and weaknesses

# Drawing up a strategic plan involves: Plan Implementation

1. Set objectives, timelines, key roles and success indicators
2. Prioritise goals, allocate and plan resources
3. Develop operating plans, budgets and schedules
4. Present the plan to members to fill gaps where critical areas may have been missed
5. Implement

# Drawing up a strategic plan involves: Measure

1. **Monitoring Performance** – measure against stated objectives and anticipated outcomes
2. **Adjust measures** if required
3. **Remain mindful of expected performance over the life of the strategic plan** (is it relevant? Why? Why Not?)
4. **Restarting the vision-making process with a new group of interested members.**

# Development





# Development: Plan2Plan

- Ensure you are viable (i.e. other more important priorities)
- Have confidence the plan will be implemented
- No cynicism
- Because it matter to you
- Conflict –free zone
- Leadership Stability
- Capacity of Board Members

Still here? Good, lets begin

# Development: Recruiting

Who should be part of the process?

- The Community League Leadership
- The Strategic Plan facilitator
- An experienced Board member
- A Strategic Plan Champion
- An Administrator
- Reps from Important Programs or Services
- “If there’s doubt, get em out”

# Understand Your Strategic Plan Approach

What type of Strategic Plan are you building?

## **Goals-Based**

- Most common form
- Emphasis on attaining goals 1,2,or 3 years out
- Already have clear Mission/Vision/Values
- Stable Environment

## **Issues-Based**

- Focused on solving issues
- Planning is driven by situational analysis
- Can be shorter-term
- Goals are designed to address issues facing the organization

# Development: Training

- The Strategic Planning Process can be facilitated entirely by volunteers or with the help of external consultants
- Train to create a common starting point
- Review
  - Why we are strat planning now?
  - Overview of the Process
  - Who will Be Involved
  - Schedule of Activities
  - Expected Outcomes
  - Who Answers the Questions?
- Interactive please (learn by doing)
- Lots of time for questions
- [INSERT PITCH HERE]

# Development: Analysis

- Carry out an environmental scan to provide an understanding of how the League relates to its external environment.
- The scan usually includes an
  - external component -- identifying and assessing opportunities and threats in the external environment –
  - and an internal component -- assessing organizational strengths and weaknesses. This process is often referred to as "SWOT": strengths, weaknesses, opportunities, and threats.
- This process may involve something as extensive as a community needs assessment with interviews, focus groups, and social media or e-mail surveys, or may be limited to a small number of informal discussions with community residents

This process leads directly into your foundational statements

# Mission Statement

What is a mission statement?

A statement of the organizations purpose, containing;

- The overall purpose of the organization
- A description of those served by the organization
- The needs of the client that it is attempting to meet

# Identify who the Community League serves and “Why it Exists?”

- Not looking for geographic boundaries here...
- What are the key needs of your community members that you would like to serve?
- Has your membership changed in the last 10 years? Will it change over the next 10 years?
- Ask questions like: “Why do we exist? What would happen if we were no longer here?”

# Vision Statement

What is a vision statement?

A statement providing a vivid description of the organizations and its clientele for the future, containing;

- Focus on the clientele in the future (its about the clientele more than the organization)
- A description of the eventual state of the organization
- An “end point” for the organizational strategic goals



# Values Statement

- Values represent the core priorities in how the Community League chooses to operate and to be viewed by stakeholders, both inside and outside the League
- Incredibly Important – drives goals
- Be careful – they must be part of your work if you create them
- “*We Believe That*”
- They also might be adjusted later in the process...

# Create Goals

# Developing the Plan: Goal Setting

- The meat of the Strategic Plan will be its goals
- Where will you be in the future? What do you want to accomplish?
- Will be informed by all of the previous work outputs and exercises
- Brainstorm goals with the team. Expect;
  - Short-Term or Long-Term Goals
  - Program-specific goals
  - Activities, Outcomes
- Can they be combined? Is there duplication?
- Are they linked?
- Group them if you can

**Develop a final ranked list of 5-8 important goals**

# Developing the Plan: Developing the Document

- Think of strategies you will use to meet each goal
- Develop action, performance and financial plans to meet goals – identify how you plan on meeting each goal (and who)
- Specify your preferred results (**performance targets**)
- Draft the Strategic Plan Document
  - Title
  - Cover Letter
  - Executive Summary
  - Community League Description
  - Strategic Plan Development Process
  - Goals and associated strategies
  - Targets
  - Plans (can also be separate)
  - Appendices (previous work products related to the strategic plan)

# Set Targets for the Community League

- Most Community Leagues, to varying degrees, set some type of performance target...(Open the Rink, Hold a Summer BBQ)
- Effective targets are SMART
  - **Specific**
  - **Measurable**
  - **Achievable**
  - **Relevant**
  - **Timely**
- Good thing we delegated goals and objectives to specific directors/volunteers when the target is created
- Goals and Targets don't have to be intimidating. They are guideposts that the organization can aim for

# Creating Targets isn't easy

## Common Mistakes/Challenges

- Many only measure what they can find
- Measures don't matter to stakeholders
- Measure will inherently have metrics that tell a good story
- Not related to performance
- No long-term viability, creating a lack of trend information

# Everyone makes similar mistakes

- **Public Libraries**

- Public Measure: Staff helpfulness; availability of materials needed; accessible hours
- Government Measure: Number of feet of shelf space; number of reference queries

- **Emergency Medical Services**

- Public Measure: “They came quickly, *knew what to do, and took my grandmother to the right hospital right away.*”
- Government Measure: Response time

- **Health**
  - Public Measure: Cleanliness and food safety ratings
  - Government Measure: Number of restaurants/food stores inspected
  
- **Roadways**
  - Public Measure: smoothness rating, snow clearing
  - Government Measure: Number of work requests; roadway miles resurfaced
  
- **Street Cleanliness**
  - Public Measure: Absence of litter; reliable refuse collection
  - Government Measure: Tons of refuse collected per work hour, procurement of new materials



# Communicate the Strategic Plan

- Arrange for internal and external review process
  - Is it coherent?
  - Is it Complete?
  - Is it Clear?
  - Is there Direction?
  - Is it Practical?
  - Is there Accountability
- Make sure its marked as *Draft*
- Have clear timelines (2 – 3 weeks)
- Circulate to all important external stakeholders – they will appreciate the opportunity to provide feedback
- Every internal stakeholder gets a copy!!
- Make revisions and prepare for Approval

# **Celebrate and Implement**

# Implementation

- **Time to implement those strategies and action plans we created**
- **Action Plans specify;**
  - **What must be accomplished**
  - **Who is responsible**
  - **Timing (start and complete times)**
  - **Required Resources**
  - **How we will monitor performance**
  - **The Target**

# Assess Performance, Monitor Goals and Targets



# Assess Performance

- After the Strategic Plan has been approved, and plans have been implemented, you will want to assess performance
  - Make sure you have delegated responsibility

*(Time passes)*

- Make reporting on targets a regular part of board meetings (dashboards, committee reports)
- Report outwards as well (to the Community) if you feel comfortable
- Re-evaluate periodically
  - It's a great tool for onboarding new board members
  - It allows the board flexibility if circumstances arise which impact performance

# What Could We Monitor?

- \$ (Monthly, Quarterly..)
- Service Results (Members using services, Program usage)
- Compliance with Board or Organizational Policies
- Human Resources (Track Board and Volunteer retention, training, recruitment)
- Member Surveys
- Media Reports
- Board Performance

# Keep in mind that measures can lag

- No organization can live and die with its measures
- All organizations fear performance monitoring
  - They fear poor performance, risk and results not achieved
- But performance measures and metrics are used to prioritize where organizational resources are needed, including if they need to be shifted to achieve performance
- Sometimes performance is not achieved because the organization strove to be the best of the best

**The number 1 killer of an effective performance measurement system is an overzealous or hypercritical oversight body**

# Questions?

Additional Questions or Comments can be directed to

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