vantage point

Transforming Not-for-Profit Leadership

Strategic Plan Implementation

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Facilitator

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Planning Consultant

Vantage Point

vantage point is on a mission to…

Transform Non-Profit Organizations

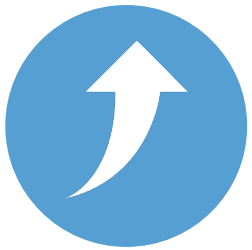
Vantage Point convenes, connects and equips non-profit leaders to lift organizational capacity.

We Deliver High-Impact Learning Opportunities

Our workshops, custom learning and consulting focuses on:

GOVERNANCE

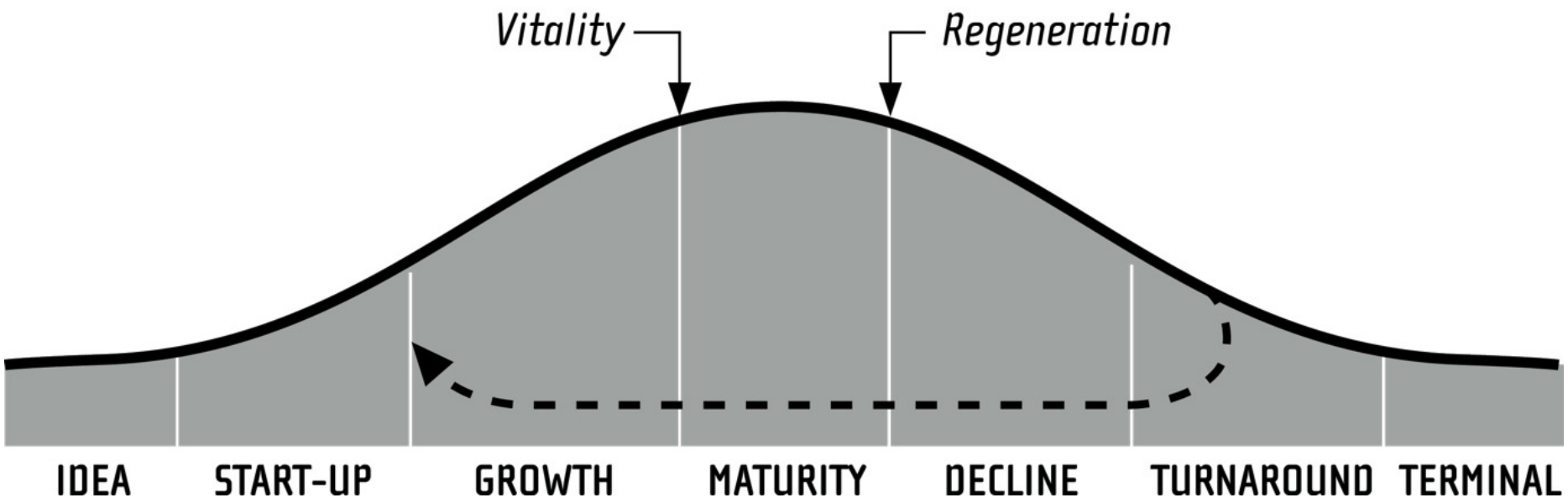
LEADERSHIP



PLANNING

PEOPLE

Nonprofit lifecycles stages



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Learning outcomes

Describe several key mechanisms that support strategic plan implementation, enhancing:

- accountability
- capacity building
- organizational focus

Agenda

- Communicating
- Monitoring
- Measuring Success
- Investing in Capacity
- Operational Planning

Two Big Ideas

1. Strategy is 95% implementation.

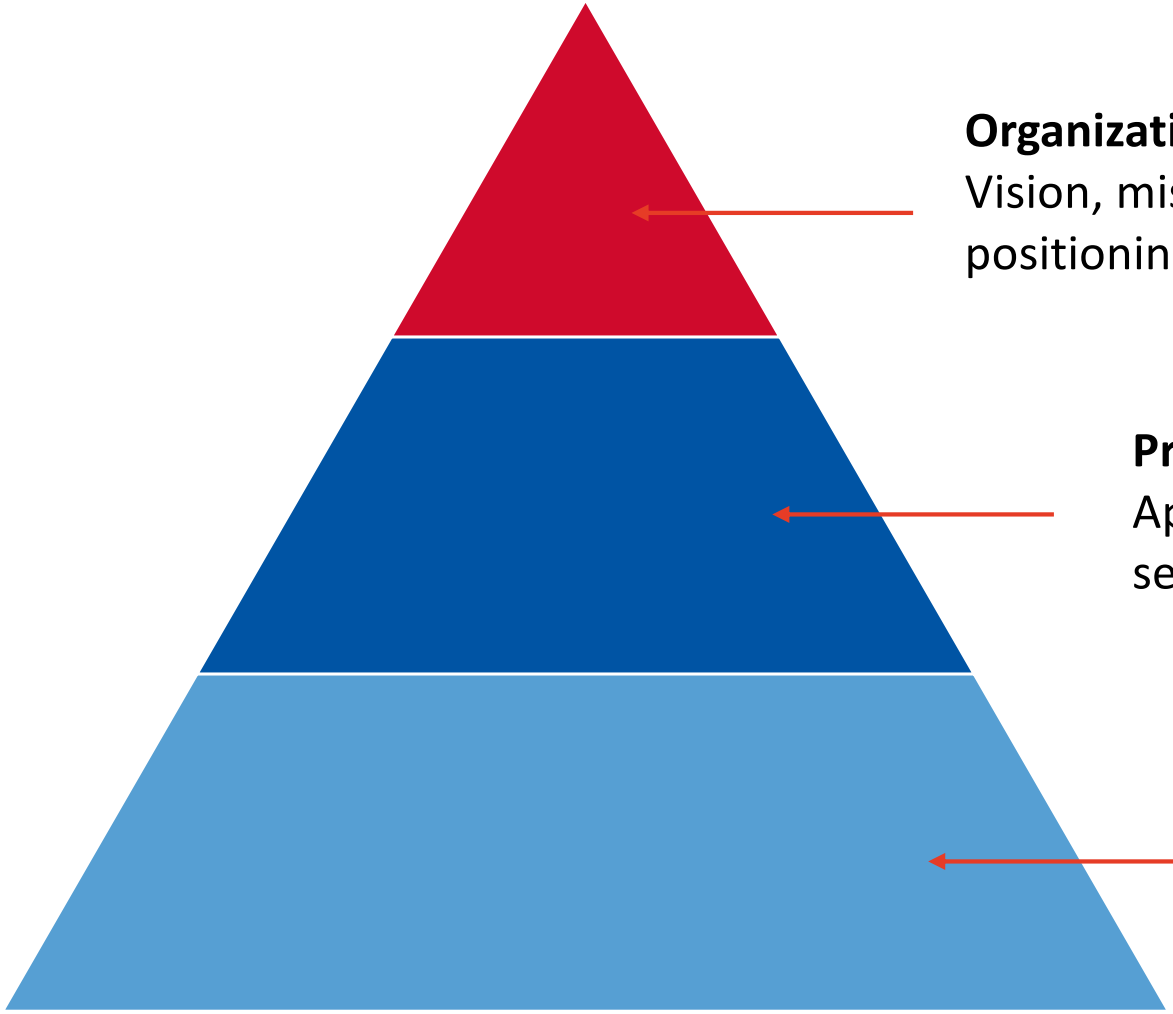
2. Culture eats strategy for breakfast.

What is Strategic Planning?

Achieving consensus throughout shared leadership on fundamental purpose, mission, direction, and relevant goals and setting organization up for ongoing strategic success.

This results in a “strategic framework,” with broad goals and strategic approaches. To some people, this may not seem like a “plan.”

The Strategy Pyramid



Organizational Strategy
Vision, mission, values, positioning, priorities

Programmatic Strategy
Approaches, programs, and services to deliver impact

Operational Strategy
Systems, policies, personnel, and administration of finances, HR, communications and technology.

- La Piana, 2008

Example 1

vantage point strategic plan

2018 – 2020

Vision

Canada's not-for-profit sector is a thriving community where organizations mindfully engage talented people, drawing on a spirit of abundance, to achieve their missions.

Mission

We transform not-for-profit organizations by convening, connecting, and equipping leaders to lift organizational capacity.

STRATEGIC PRIORITIES

1 Develop new connections and deepen existing relationships in British Columbia

- Increase opportunities for funders and sponsors to support Vantage Point learning opportunities and invest in capacity building
- Expand accessibility of our programs to organizations through our internal bursary program and to organizations outside lower mainland
- Develop critical relationships with key government entities and support their knowledge of the not-for-profit sector and capacity building

2 Develop and deliver relevant, high-impact learning opportunities

- Develop & deliver 2 new compelling labs: Managing for New Managers and New Executive Director Deep Dive
- Expand delivery of transformational organizational assessments and capacity improvement activities
- Continue to explore and share new approaches to impactful and inclusive board governance
- Celebrate volunteerism, our community, and Vantage Point's 75th anniversary

3 Measure and communicate our impact on leadership, capacity, and people engagement

- Gain recognition as the expert and trusted advisor on the critical importance of capacity to organizational performance improvement
- Launch the Capacity Champions campaign with key partners, and share the message with the sector, media, funders, and governments
- Track and communicate programs results with demonstrated improvement to performance, outcomes, and impact

4 Build our internal capacity and sustainability

- Meet our revenue and fundraising targets and begin to build an operating reserve
- Successfully transition to Vantage Point's next Executive Director
- Continue to develop a talented and highly engaged staff and volunteer team

Important questions

How big are the aspirations in your plan?

How much change does your plan involve?

“There’s no change without change.”

Communicating

Accountability

Communication - Internal

How will the plan be communicated inside the organization?

- To the board
- To staff
- To volunteers
- To members

What steps will you take to **legitimize** the plan to these groups, especially if they were not involved in the **creation** of the plan?

Communication - External

Will your plan have an external face?

- One-pager / “plan on a page”
- Website

Who will you share your plan with?

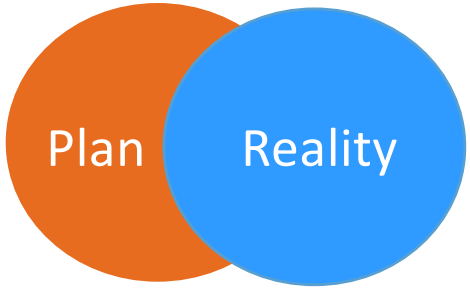
- Neighbours and allies
- Donors and funders
- Partners and collaborators

Monitoring

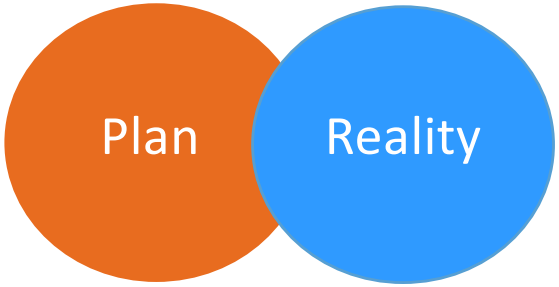
Accountability

Drift

When we create a plan, it matches reality closely.



Over time, reality (inside and outside the organization) drifts.



Past a certain amount of drift, we stop referring to the plan because of this mismatch ☹.

Drift

Counter drift with regular monitoring, reporting, and updating.

(Monthly? Quarterly? Annually?)

What's the opposite of a "living plan"?

Measuring Success

Accountability + focus

Toward Assessing Impact

For each priority, goal, objective, strategy, or activity, how will you know if you are successful?

- Key Performance Indicators?
- Metrics?
- Success measures
- Outcome evaluation?

Measuring Progress

When discussion specific measures, be clear on whether you're trying to measure **organizational performance** or **impact**.

Lack of clarity on this point causes confusion.

Measuring Success

Measuring Success

Organization X conducts workshops for non-profit leaders…

Run 10 workshops.

10 participants in each workshop.

Participants gain knowledge.

Participants gain confidence.

Participants feel more strongly connected with each other.

Organization is more resilient or sustainable.

Organization has a greater impact in community.

The Goldilocks Challenge, Gugerty & Karlan

"CART"

Collect data that is:

- Credible (high-quality data, analyzed correctly)
- Actionable (data you can commit to use)
- Responsible (benefits outweigh costs)
- Transportable (generates knowledge for other programs)

Indicators

Choose the measures that help you:

- Learn how to do better and adapt for greater impact
- Steer the work in positive directions
- Tell your story to different audiences
- Understand whether you've been successful

Which is most important?

Discussing Capacity

Capacity building (of course)

Capacity

How will you invest in yourselves?

Capacity is not just *time* and *money*, but also…

A. Skills, knowledge, competencies
B. Systems, processes, structures
C. People, culture, mindset

Structure

- ✓ Are there structural changes, or staff role changes, that will support implementation of your strategic plan?
- ✓ Are there changes to volunteer roles – or board committee structures – that will support implementation?

Building capacity

Strengthening the **organizational platform** which supports and sustains your mission and programs.

Which areas of capacity are limiting your implementation?

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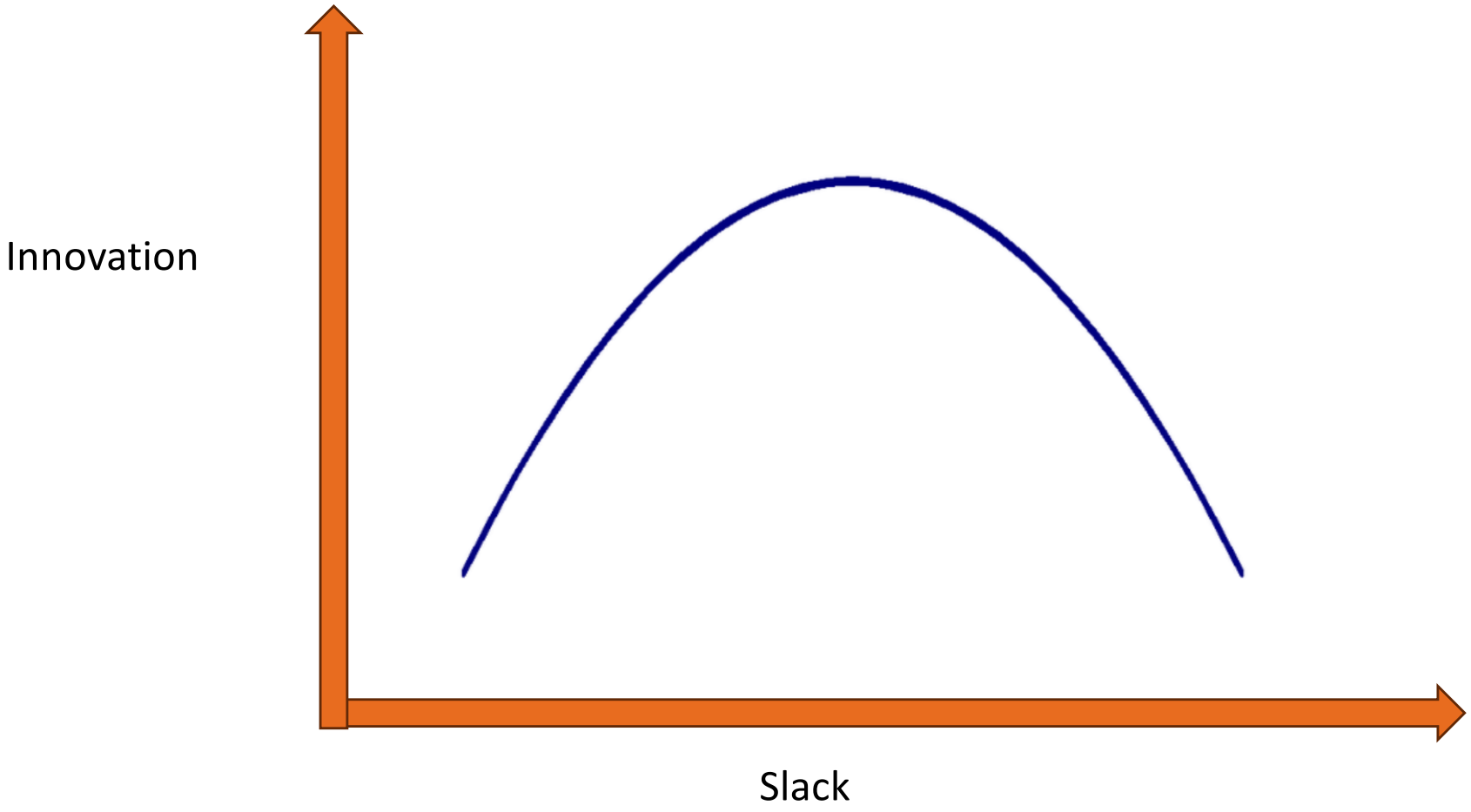
The Innovation-Slack Curve



Operational Planning

Focus + Accountability

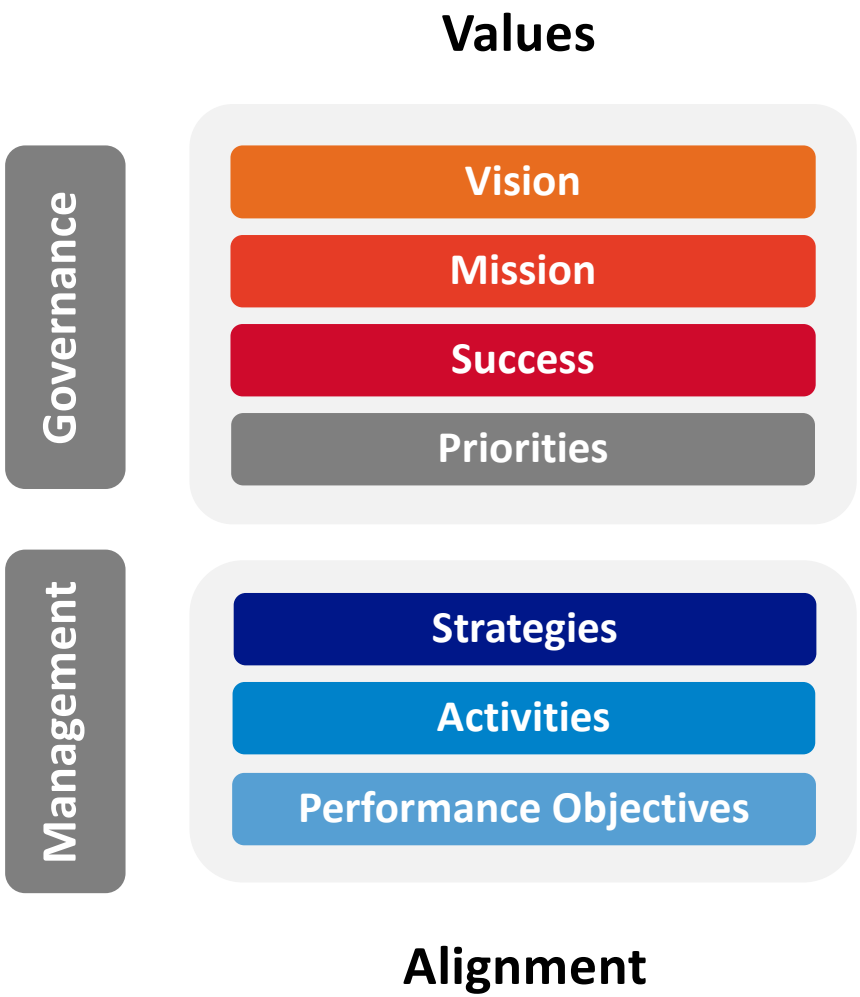
Strategic and Operational Plan

Strategic Plan	Operational Plan
Set every 3 – 5 years	Set annually
Connected to definition of organizational success	Connected to the strategic plan and budget
Involves the Board of Directors	Responsibility of the ED/CEO
May or may not be “measurable”	Followed by indicators or metrics, organizational design, HR plan, etc

The big ideas

The nuts and bolts

Strategic vs Operational Plans



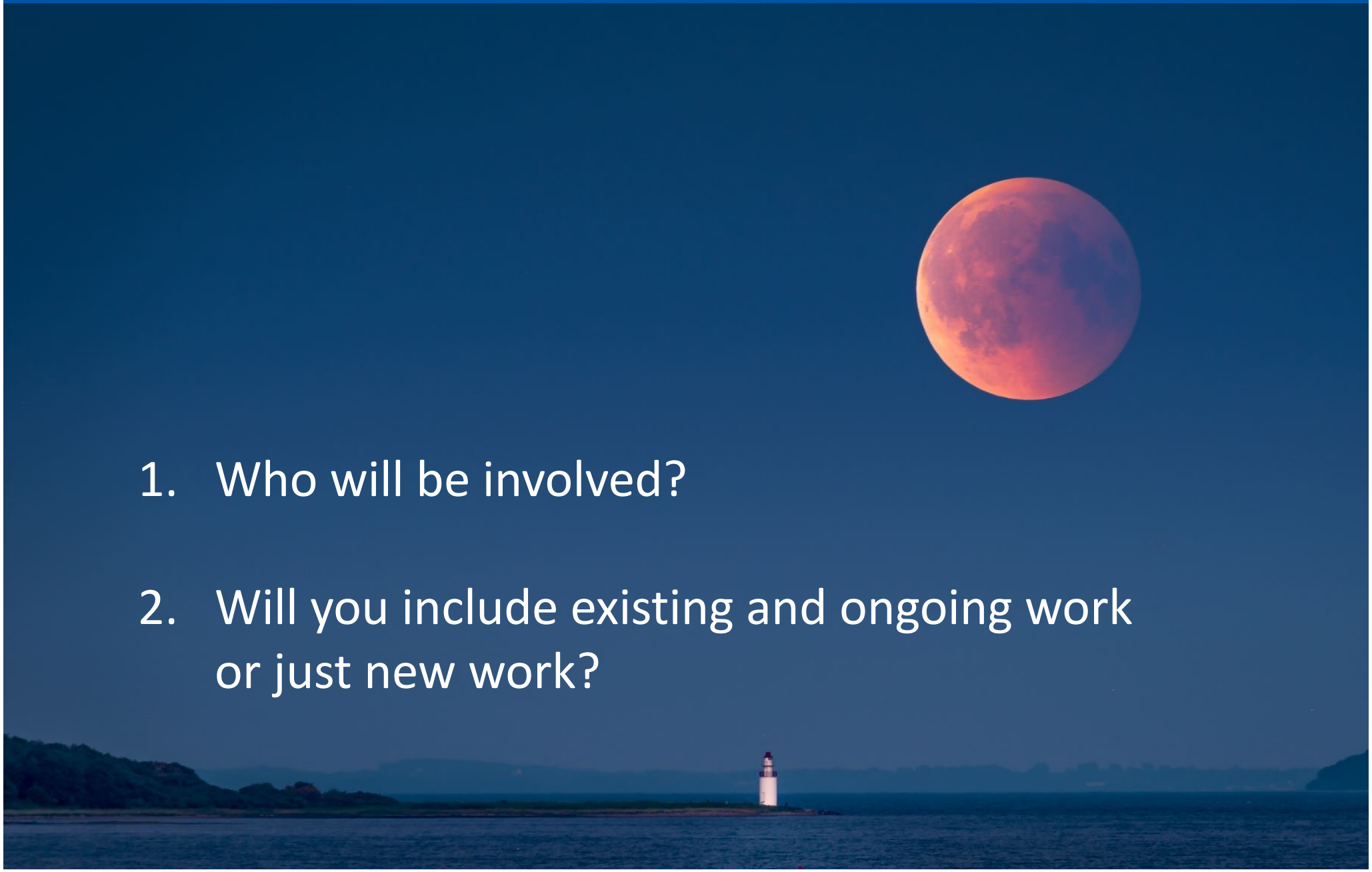
Sample Operational Plan

Priority:					
Strategies	Activities	Lead / Owner	Time	Resources Required	Status
1.					
2.					
3.					

Designing your Template

1. Who will access, update, and monitor the operational plan?
2. In what format will you keep the plan (e.g. Word, Excel, Asana, etc.)?
3. What elements (columns) do you need in your plan?

Developing an Operational Plan



1. Who will be involved?

2. Will you include existing and ongoing work or just new work?

Drift

Counter drift with regular monitoring, reporting, and updating.

(Monthly? Quarterly? Annually?)

What's the opposite of a "living plan"?

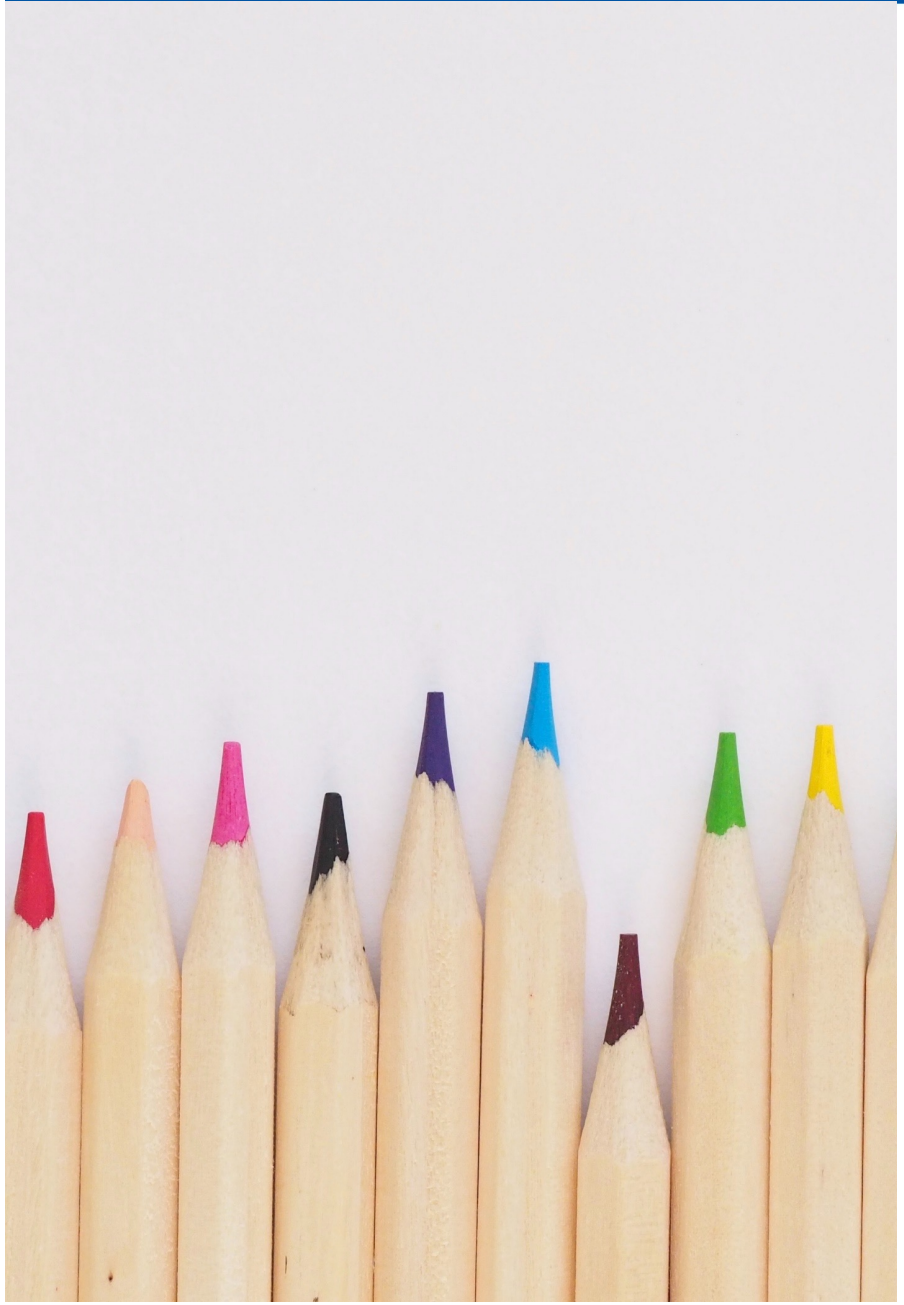
A culture of planning

1. We talk about the future.
2. We make *decisions* about our future.
3. We *write down* those decisions.
4. We *assign responsibility* for actions related to those decisions.
5. We *follow up* on what we wrote down and adapt as necessary.

Embedding Values

Accountability

Values



Values aren’t just words.

Authentic expression of values requires costs, trade-offs, and sacrifices.

Values inform decisions.

Embedding Values

Leadership
- Leadership behaviours
- Leadership communications

HR
- Recruiting and hiring
- On-boarding
- Training
- Performance appraisals
- Promotions
- Employee recognition
- Perks and benefits (non-monetary rewards)
- Compensation

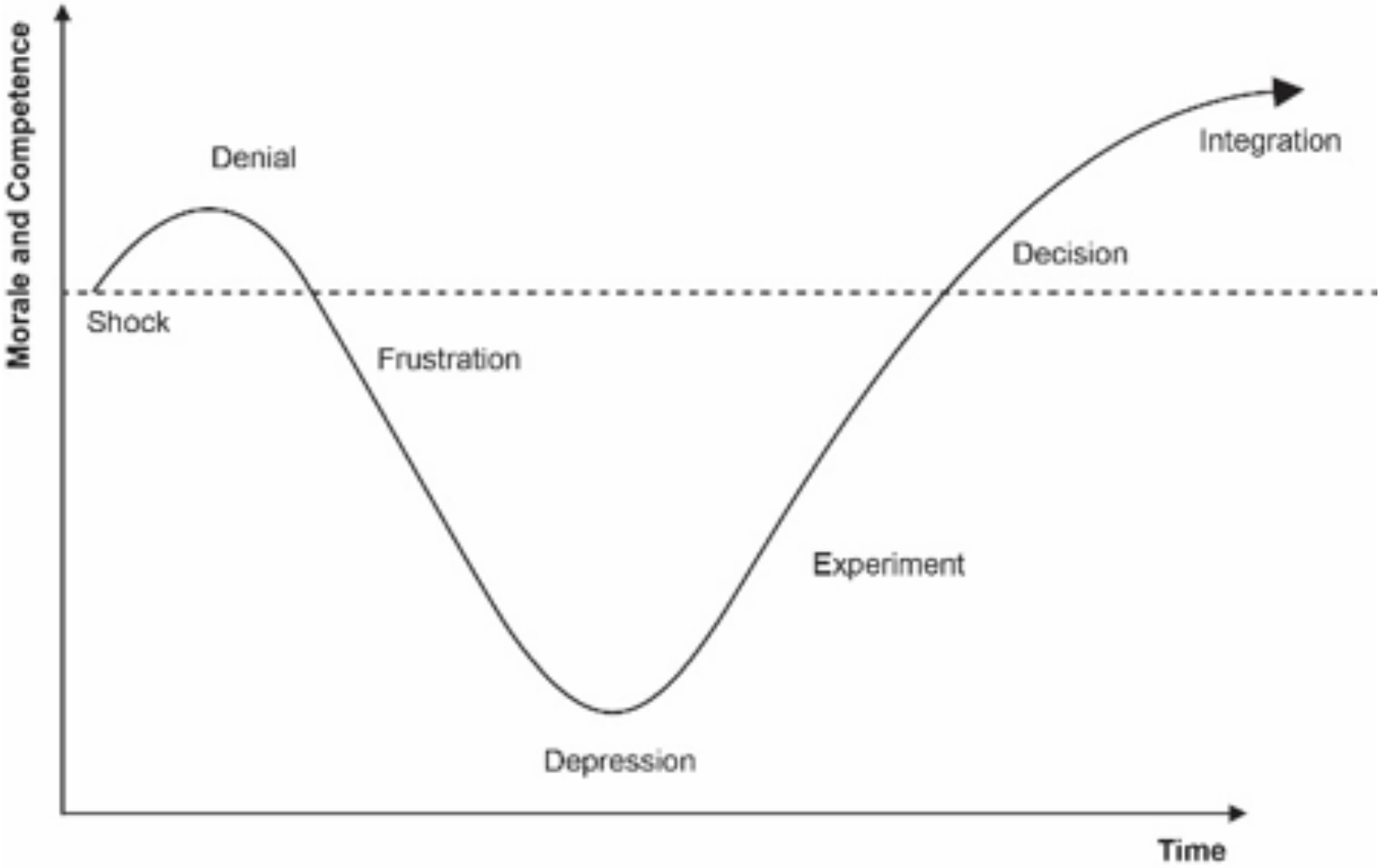
Engagement
- Stakeholder relationships (suppliers, partners, clients, etc.)
- Internal communications
- External communications

Admin
- Policies (expense, travel, secondments, etc.)
- Contracts
- Office environment
- Procurement / purchasing

Leading Change

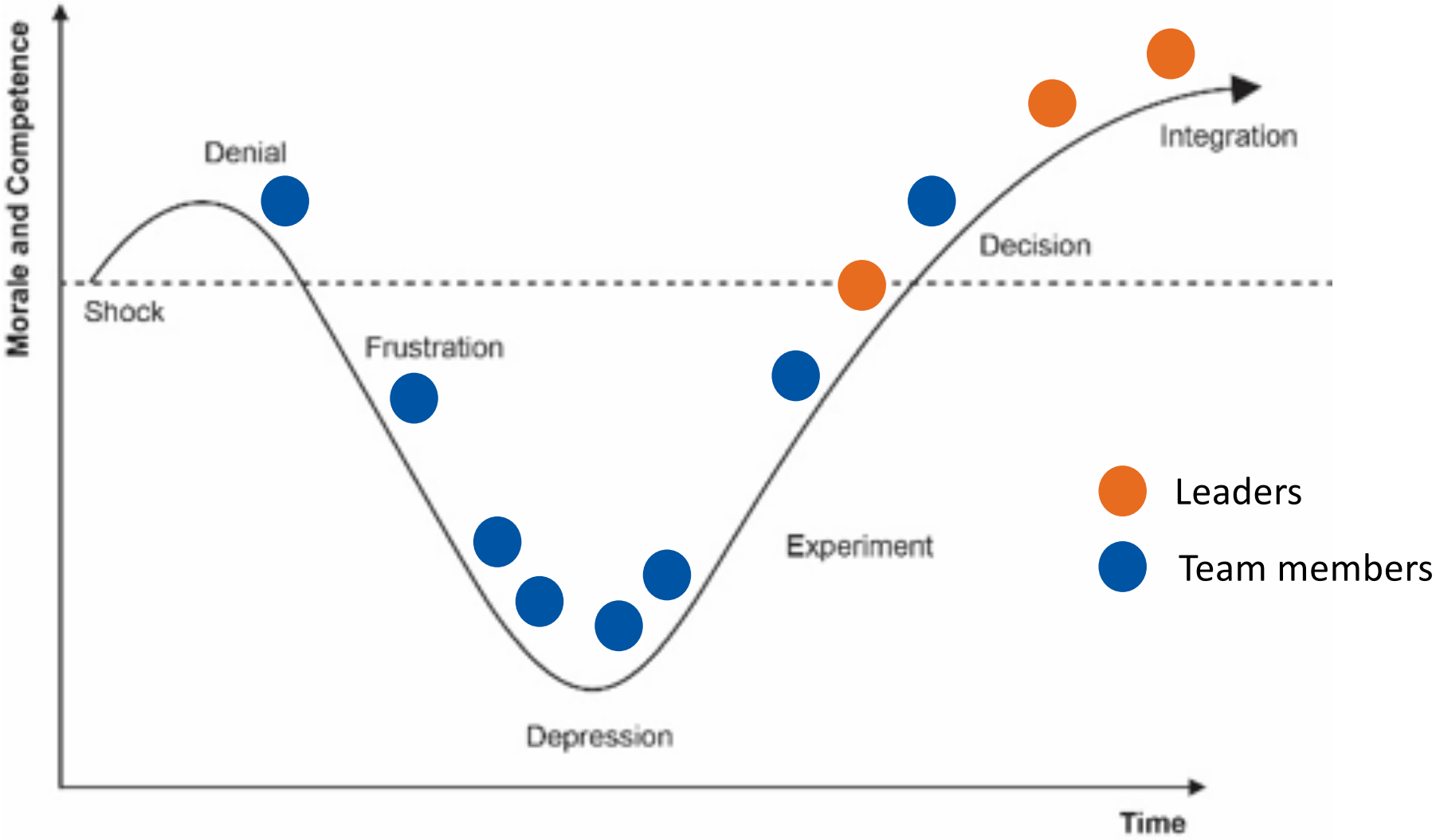
Accountability

Psychological reaction to change



Kubler-Ross (1969)

Where people are on the change curve



Kubler-Ross (1969)

Learning to Say No

Organizational Focus

Learning to say “no”

Do you have a “no” muscle?

Remember, sometimes saying “no” means…

… saying “not yet.”
… saying “not us.”
… saying “yes” to everything you’re already committed to.

And sometimes it just means saying “no,” pure and simple.

Strategy Filter

A set of criteria, often phrased as questions, that help an organization assess new opportunities that arise.

Many organizations use their strategic plan as a kind of strategy filter. Others have a set of questions they use to **guide** decision-making.

Simple strategy filter

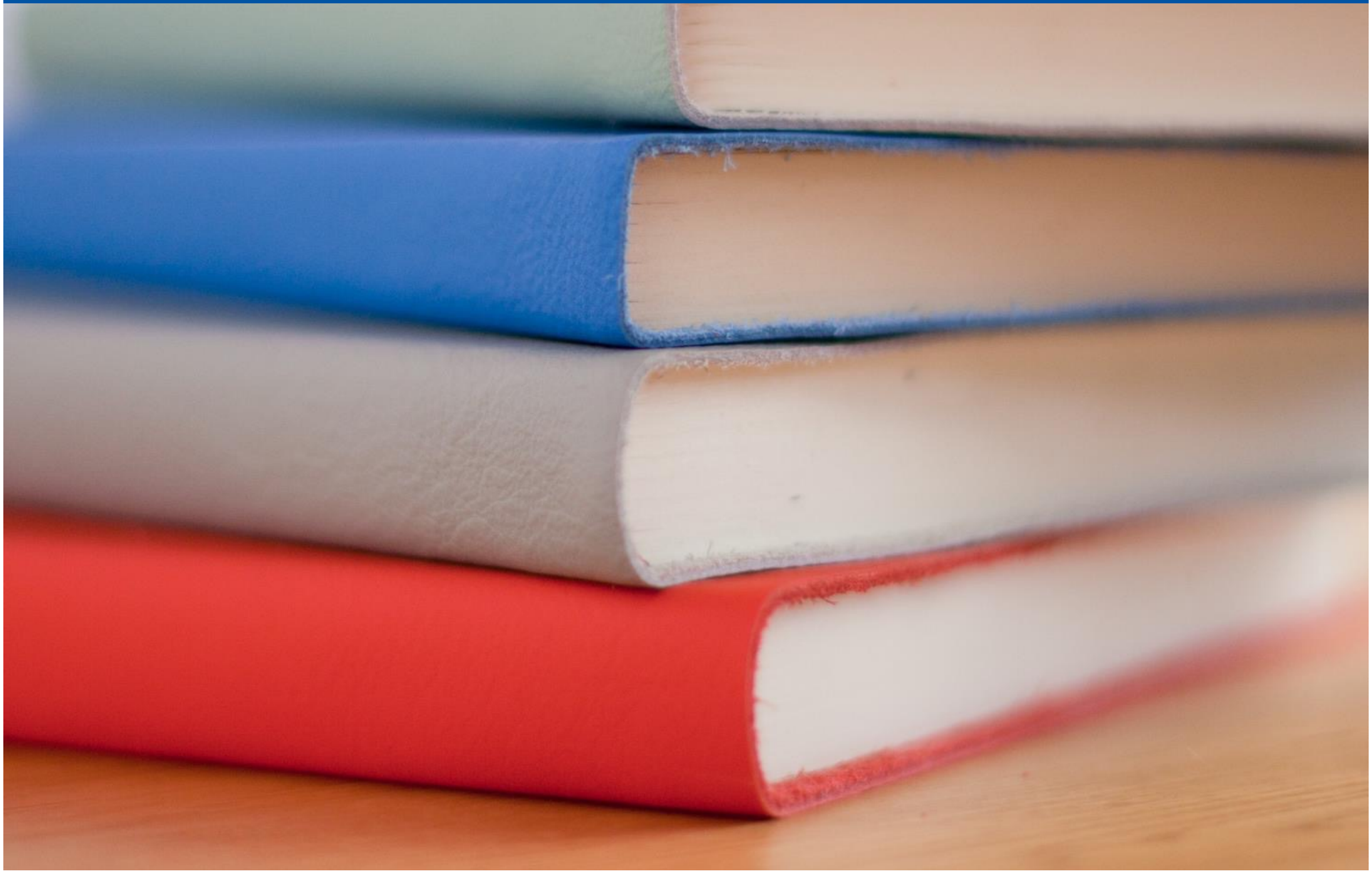
1. Does it fit with our mission?
2. Does it match one of our broad priorities?
3. Can we sustain it for more than one year?
4. Does it fit with our core values?

Strategy Filter //

Robust Example

	QUESTION	YES	NO	UNSURE
FIT	1. Does this fit with our mission?	Proceed	Don't	Don't
	2. Does this play to our strengths?	Proceed	Don't	Study
	3. Can we do this without compromising our values of equity and accessibility?	Proceed	Don't	Study
	4. Can we have enough control to ensure we have the relevance and excellence we want?	Proceed	Don't	Study
BENEFITS	5. Does credit for this flow to the organization?	Proceed	Don't	Study
	6. Does this drive traffic to the organization?	Proceed	Don't	Study
	7. Is this fun and fulfilling for staff and other internal stakeholders?	Proceed	Don't	Study
IMPACT	8. Does this deliver high impact?	Proceed	Don't, or find innovations or efficiencies	Study
VIABILITY	9. Can we afford this?	Proceed	Don't, or find funding	Study
	10. Is this sustainable from a business perspective?	Proceed	Don't	Study
	11. Are there competitors doing this more effectively or successfully than we can?	Proceed	Don't, or partner	Study
FEASIBILITY	12. Do we have the time to do this?	Proceed	Don't, or partner, or increase capacity	Study
	13. Do we have a willing and trustworthy partner, if we need one?	Proceed	Don't, or find a partner	Study
	14. Is this too difficult for us to execute well?	Proceed	Don't, or partner, or increase capacity	Study

Questions and comments



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Thank you

Join us for our next learning opportunity.

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