

INTEGRALIntros

Intro to Strategic Planning

Crafting the future of your nonprofit

 IntegralOrg



January 8, 2025
1:00 - 2:00 pm

6

Mohkinsstis

Land Acknowledgement

Bearspaw First Nation

Siksika First Nation

Piikani First Nation

Goodstoney First Nation

Chiniki First Nation

Kainai First Nation

Tsuut'ina First Nation

Métis Nation of Alberta, District 5 and 6

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Your facilitator for

Introduction to Strategic Planning

INTEGRALIntros

Mike Grogan
IntegralOrg, President and CEO





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Introduction to Strategy



- Understanding the **components of strategic planning** and how to **adapt** these within a changing environment.
- Tools and processes to better understand an **organization's current capacities and external trends**.
- Approaches to **keep strategy front and center** and building ownership throughout the organization.

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Why do we need a strategy?



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Opening Thoughts



- All organizations, no matter their size, focus or stage of life require some sort of roadmap to guide them.
- Recovery does not mean restoration. Uncertain political and economic environments will continue to impact nonprofits.
- Planning in uncertainty is hard. Uncertainty need not paralyze us. There are ways to move forward.

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Working Strategically

Two interdependent but distinct elements:

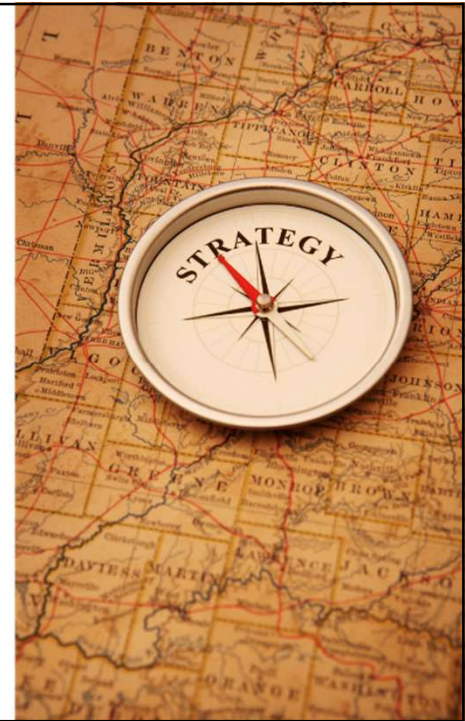
Strategic Thinking

Exploration, intuition, creativity, disruption, generating options with incomplete, ambiguous, and/or contradictory information.

Strategy Development

Assessing options, examining choices, making decisions and/or setting directions.

Source: Brand, 2003



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What is strategic thinking?

Two interdependent but distinct elements:

Strategic Thinking

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Strategy Development

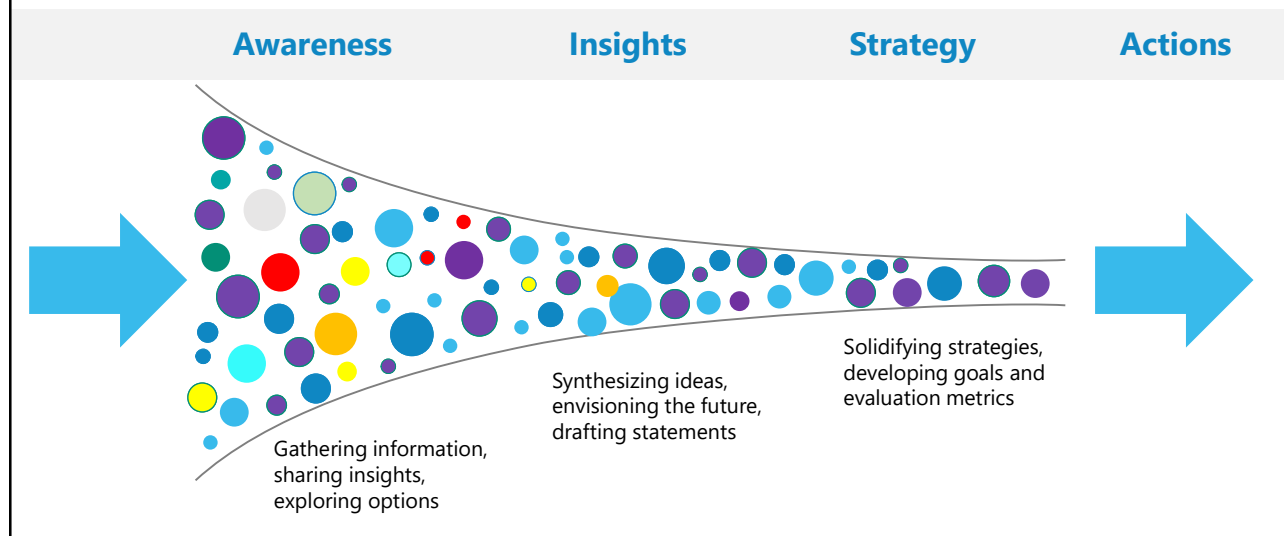
Assessing options, examining choices, making decisions and/or setting directions.

Source: Brand, 2003



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Strategy funnel



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“ Strategic planning is an organizational management process used to determine where an organization is going, the actions needed to make progress, and how it will know if it is successful.”

Balanced Scorecard Institute



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Competitive advantage

“ A strategic plan is a coordinated set of actions designed to create and sustain a competitive advantage in achieving our mission. ”

David LaPiana



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A strategic plan is . . .

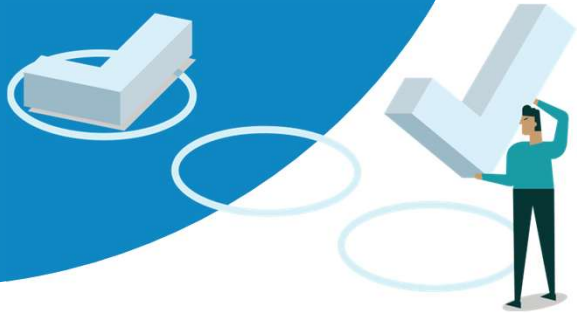
“ a coordinated set of actions designed to create and sustain a competitive advantage in achieving our mission. ”

David LaPiana



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Poll: Does your organization currently have a strategic plan that meaningfully guides your work?



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Strategy Development

Getting from here to there



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What is strategy?

Getting from here to there



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What is a strategic plan?



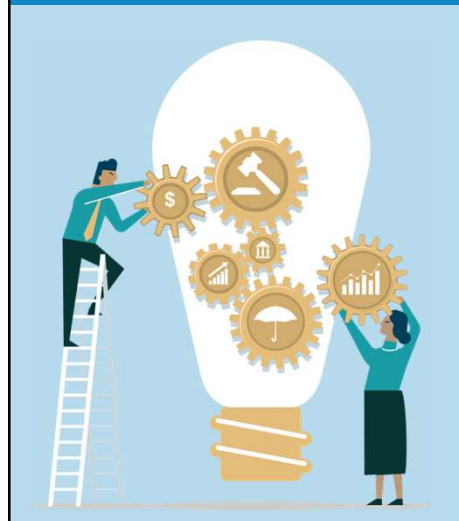
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What is a strategic plan?



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Crafting Strategy



As **uncertainty increases**, the length of our **planning timeframes should decrease**.

Effective strategy formulation and implementation needs to be **inclusive, clear, and focused**.

Governance, management, and operational styles and systems need to be **aligned** to support strategic directions.

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The Strategy Process



There are innumerable processes, styles, and templates for developing strategy.

Using a defined process adds value as it imposes discipline and forces organizations to face difficult issues and choices.

Strategic planning and strategic plans are a *means to an end* and are not ends in and of themselves.

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Crafting Strategy



There are many approaches to strategic planning. Don't feel obligated to use a particular process. Find a process and style that fits your organization.

Several factors will influence your planning process, such as:

- Organizational size and structure
- Types and number of programs
- Funding structures and levels
- Types of stakeholders
- External operating environment

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The Purpose of Strategy



Identifies and articulates your **organization's focus and priorities**.

Allows for **energy and resources** to be allocated efficiently and effectively.

Ensures that staff, board, and volunteers are working toward **common goals**.

Establishes agreement around intended outcomes or results.

Provides a **frame to assess and adjust** the organization's direction in a changing environment.

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The purpose of strategy



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The Strategy Process



Most planning processes will include elements of:

- A cycle of preparing, visioning, planning, and evaluation.
- Understanding the current state of your organization, your industry, the external environment, and the desired future.
- Establishing priorities, goals, and action steps.
- Processes and timelines for evaluation and revision.

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Look Closely at Your Capacity



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Know Your Capacity



- Developing a common understanding of key operational, governance, and strategic capacities is a critical first step.
- Iterative, ongoing assessment is crucial to creating, and sustaining your plans.
- There are many ways to do this – formally and informally.

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Internal Analysis Tool Identify Strengths & Weaknesses (SWOT)

- Where is your organization its best? What do you do exceedingly well?
- What opportunities are emerging that your organization might consider?
- What hinders your performance? In what ways do you need to improve?
- What might threaten the ongoing sustainability of your organization?

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Know Your Capacity

Customized
Organizational
Assessment
for your organization



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Traditional Model



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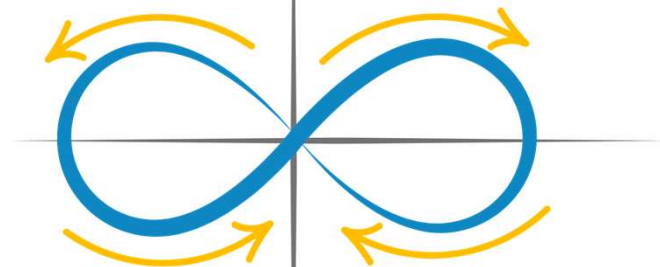
In Reality

Reorganization

Conservation

Growth

Release



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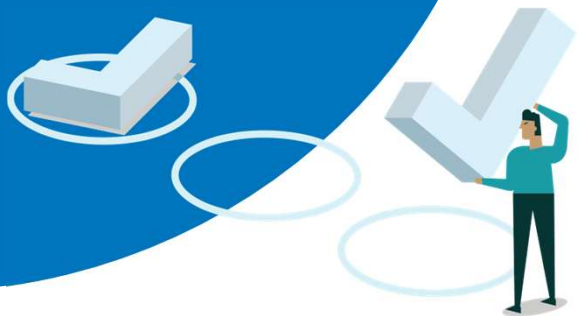
Know the Industry



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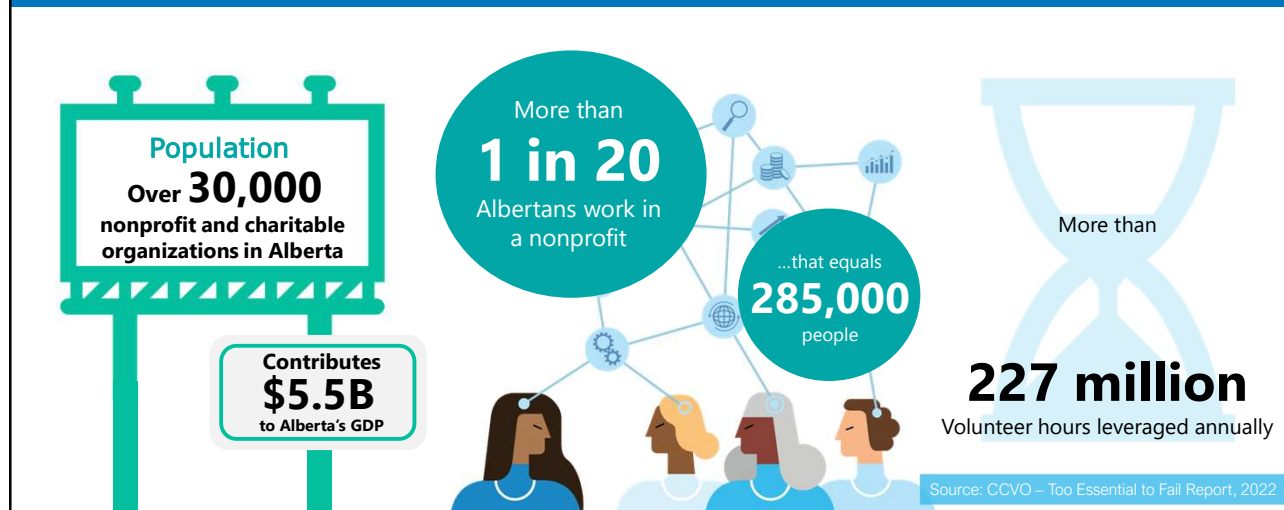
Enter in the chat!

How many nonprofits are currently active within Alberta?



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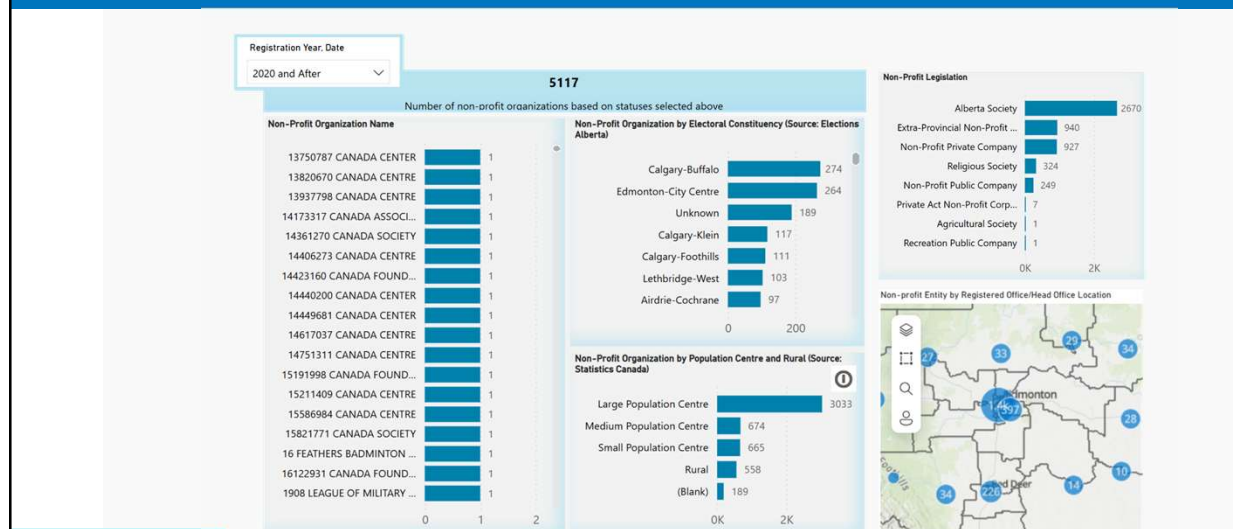
A large and growing sector



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Alberta Nonprofit Listing

organizations and % of total organizations



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Industry Analysis

“Industry analysis is a tool that facilitates a company’s understanding of its position relative to other companies that produce similar products or services.”

Inc. 2020



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Industry Analysis

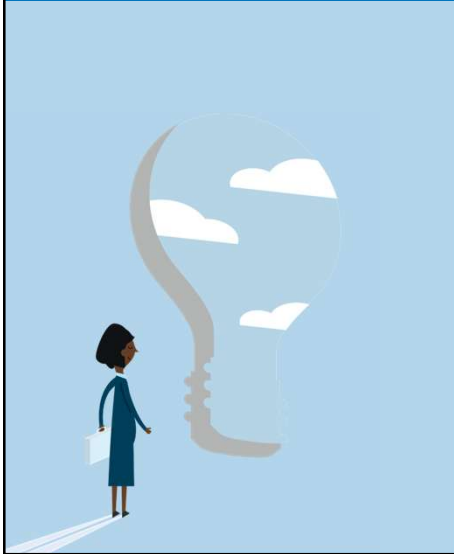
“Industry analysis is a tool that facilitates a company’s understanding of its position relative to other companies that produce similar products or services.”

Inc. 2020



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Industry Analysis



- What are your **primary areas of activity**?
- What is the **demand**, current and expected, for the services you offer?
- **Who else** offers services that are similar to yours? What are their advantages and disadvantages?
- What are the **barriers to entry** in your industry?
- What **relationships** are critical to your success?
- What are the **key future opportunities** within this industry sector?
- What are the **key future challenges** within this industry sector?

Source: Stanford Strategic Leadership for Nonprofit Organizations, 2004

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Industry Analysis



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Know the External Environment



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External Analysis Tool Survey the External Environment (PEST)



What are the key **political**, **economic**, **social**, and **technological** factors that might impact your organization?

How impactful might each of these trends be?

How will you monitor shifts in these trends?

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External Analysis Tool Survey the External Environment (PEST)

 **Political**
 **Economic**
 **Social**
 **Technological**

Some examples of political, economic, social, and technological factors that a group came up with during a PEST analysis in mid 2024.

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Survey the External Environment using PEST

 **Political**
 **Economic**
 **Social**
 **Technological**

What external trends will affect your nonprofit?

 **IntegralOrg**

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**How you are
depends a lot on
where you sit.**



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Trends



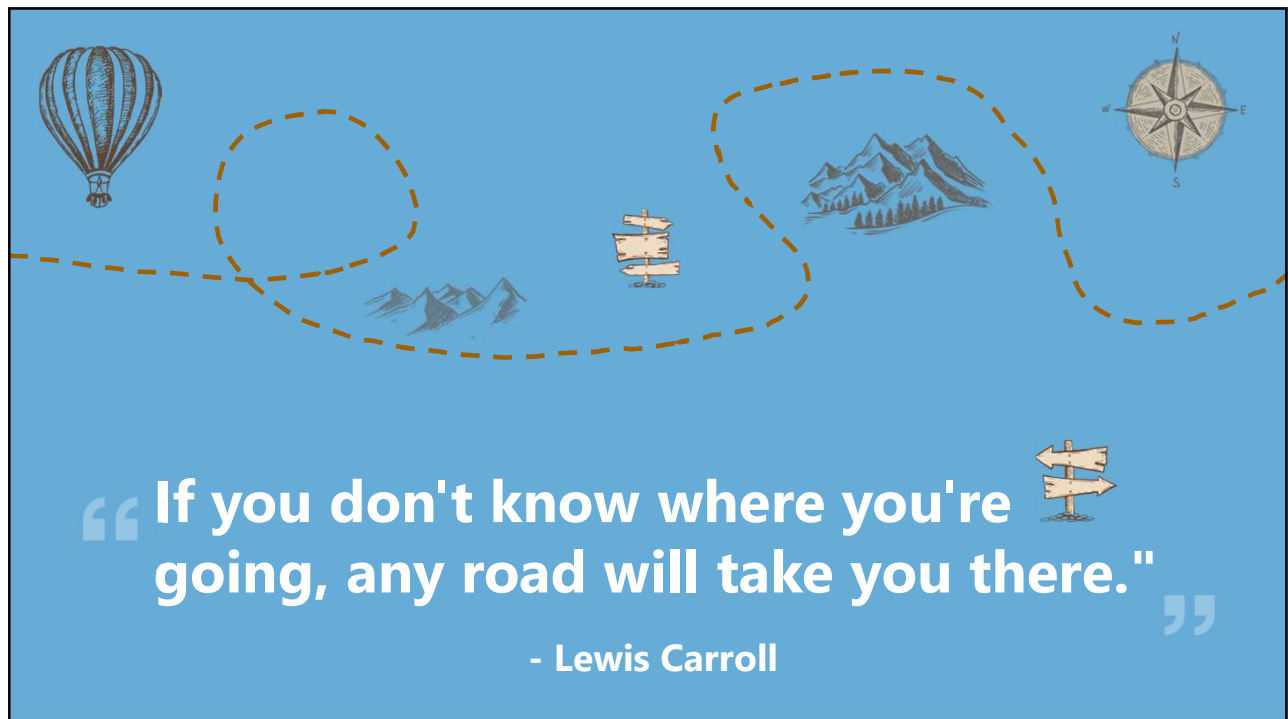
- Inflation rates have returned to target levels, but 2-3 years of price increases remain in place.
- Affordable housing for staff and clients continue to challenge nonprofits.
- High levels of economic uncertainty with political changes in Canada and the US.
- Workforce (paid and unpaid) challenges remain for nonprofits.

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Envisioning the Future



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“If you don't know where you're going, any road will take you there.”

- Lewis Carroll

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The Future of Our Organization



- Our aspirations and plans must take into account the **purposes of our organization** and **realities of the world we work within**.
- We need to imagine what plausible futures might look like so that we can develop effective strategies.
- Decisions taken today will have effects years into the future, but full information about the future is never available.

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The Future of Our Organization



- The future is, in most cases, likely quite aligned with the past
- Use prompts and processes to help you consider the future:
 - Start, Stop, Continue
 - Big Hairy Audacious Goals
 - Sustainability Analysis
- Be inclusive. Involve those for whom the future matters
- Refine the vision until it fits

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Creating a Plan



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Levels of Planning



Strategies: The route you intend to take and the general methods you intend to use to reach the top of that specific mountain.

Long-Term Strategic Activities: Intermediate objectives to the top of the mountain. If you have a 3-year vision, these would be intermediate objectives on the way up the mountain.

Short-Term Goals/Actions: Specific moves for climbing the sections of rock and ice that confront you right now. These would be analogous to detailed annual plans for getting things done this year on the way to the 3-year objective.

Source: On Strategy, 2017

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Planning Example

(We) will continue to diversify funding streams to improve sustainability and increase discretionary funds.

We will accomplish this by:

- Exploring social enterprise opportunities, including completing a feasibility study on a commercial kitchen and implementing the recommended plan of action.
- Developing a long-term fund development strategy that includes fund development processes, staffing requirements, achievable targets, and identifies resources needed for implementation.
- Continuing to increase the culture of philanthropy and build relationships with existing and new funders and supporters.

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Living Into Your Strategic Plan:
A Guide to Implementation
That Gets Results

By:
Jacquelyn Hadley,
Laura Lanzerotti, and
Adam Nathan

The Bridgespan Group

Putting Thought Into Action

Source: Bridgespan Group

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“

...we've often heard a collective sigh of relief when the planning process is over. It's understandable. Strategic planning is hard work. It involves articulating the results for which the organization will hold itself accountable and the actions it will take to get there. Because it is hard work, it's tempting to think that finishing the written plan is equivalent to crossing the finish line.

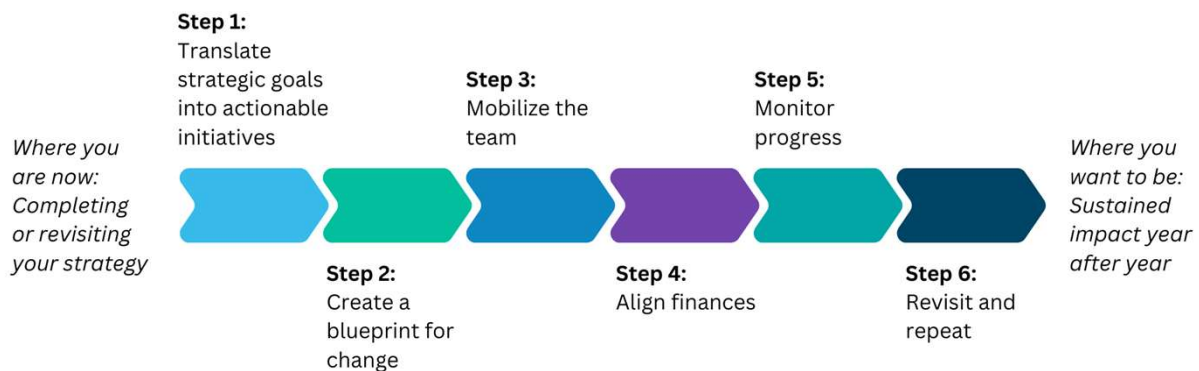
”

Bridgespan, 2020



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Step-By-Step Implementation that Gets Results



Source: Bridgespan Group, 2016

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Tools and Templates
Step 1: Translate

Initiative Overview Template

How to use this template? Use this template to translate your strategic priorities into detailed, 12-18 month initiatives and concisely view their high-level characteristics, resources required, and timelines.

Why would you use this template? When you are translating strategic goals into actionable initiatives.

Strategic Priority	Initiative	Outcomes	Lead	Team members	Resources required	Interdependencies	Start date	End date
Strategic Priority 1	Define major initiatives (may be multiple for each strategic priority)	List the anticipated outcomes for each initiative	Designate person who will own initiative	List names of people who are responsible for driving the initiative forward	Briefly explain financial and other resources needed to implement initiative	Explain dependencies on organizational support functions (i.e., HR, IT, finance, etc.) or other initiatives	Estimate general timeline for the project (Quarter/Month/YYYY)	
1.1	EXAMPLE: Assess and segment sites into four categories	Each site is placed into four categories	George W.	Sally O. Billy C. Hillary J. Darryl K.				
1.2	EXAMPLE: Assemble support teams and prepare supports for each category	Support teams are established	Sally O. Hillary J.	Jenny C. Mark N. Michael K. Rick W.				
1.3	EXAMPLE: Engage in long-term strategic planning with high priority sites	First long-term strategic plan is complete	Billy C. Darryl K.	Kate G. Duncan A. Lucas P. Mark D.				
Strategic Priority 2	2.1							
	2.2							
Strategic Priority 3	3							

Tools and Templates
Step 5: Monitor

Board-Level Performance Dashboard

How to use this template? Use this template with your board to assess progress and potential next steps on the high-level initiatives for each initiative.

Why would you use this template? At board meetings, including quarterly and annual reviews of strategy and implementation.

Strategic Priority	Status	Initiative Milestones	Lead
1	On Track	List initiatives and their accompanying metrics from Steps 1 and 2 here	George W.
2	Needs Attention		Sally O. Hillary J.
3	Off Track		Billy C. Darryl K.

Tools and Templates
Step 6: Revisit and Repeat

Annual Implementation Timeline

Step 1: Translate goals into initiatives
Step 2: Create a blueprint for change
Step 3: Mobilize your team
Step 4: Align resources
Step 5: Monitor progress

Note: Timeline assumes July-June fiscal year

Living Into Your Strategic Plan: A Guide to Implementation That Gets Results

Bridgespan Group, 2011

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Maintaining a Strategic Focus

- Day-to-day activities along with emerging problems and opportunities can distract from our strategic work.
- Embed the priorities and goals as part of your ongoing governance and management process.
- Be disciplined about revisiting and revising the process

Source: On Strategy, 2017

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Closing Thoughts

- Saying "no" to specific activities is an integral part of the process.
- Demand* for services will always outpace the supply to resources to provide those services.
- Smaller organizations have a tendency to be overly bold in their plans; larger organizations tend towards conservation.

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Questions?

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Thank you for attending!

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Please complete our evaluation survey!

Your feedback will inform the delivery of our future training opportunities!

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When you have questions, IntegralOrg has services to help

**A virtual or phone conversation
or**

A clinic, a 1-hour problem-solving session between IntegralOrg subject matter experts and your team.

You might have questions about

- Attaining charitable status
- Strategic planning
- Policies & bylaws (writing and review)
- Social enterprise legal structures
- Governance and board development

These services are free of charge!

Find out more at integralorg.ca/who-we-work-with/clinics/

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