



STRATEGIC

Driving Client Value

STRATEGIC
FRAMEWORK
PLANNING

NONPROFIT
PARTICIPANT
GUIDE

© SESSION I

WELCOME TO OUR STRATEGIC FRAMEWORK PLANNING SESSION

The purpose of the Strategic Framework Planning Session is to enable our organization to chart a path to success. The session will assist our organization to manage the complex, competing demands we face and to create an organization that will meet our clients' needs and our partners' expectations over the long-term.

Like other Nonprofit organizations we must:

- Orchestrate complex internal and external relationships;
- Achieve excellence in programs and services; and
- Produce decisive results that are experienced by our clients.

THIS STRATEGIC FRAMEWORK PLANNING SESSION IS ORGANIZED TO:

- Maximize our participation in focused discussions;
- Facilitate decision making; and
- Complete the process with clarity, consensus and conciseness.

IN THESE SESSIONS WE WILL CREATE ANSWERS TO SOME FUNDAMENTAL QUESTIONS:

- Where are we going?
- How will we know when we have arrived?
- How are we going to get there?

THIS IS A PROVEN PROGRAM

We have selected this program, developed by Hewat Strategic Edge Ltd. because of its proven track record.

Hewat specializes in providing resources to support Nonprofits.

This program has been used successfully by hundreds of organizations in North America & Europe.



ORGANIZATIONAL UNCERTAINTY AND THE NEED FOR CERTAINTY

We can all find examples in organizational life that have the effect of creating uncertainty about:

- Our purpose
- Expected accomplishments; and
- Understanding our roles in achieving success



WHAT IF WE DON'T CREATE A NEW STRATEGIC DIRECTION?

- A lack of clarity about what we are trying to accomplish creates uncertainty.
- Uncertainty generates a lack of confidence.
- A lack of confidence breeds subpar performance.

BENEFITS OF A CLEAR STRATEGIC DIRECTION

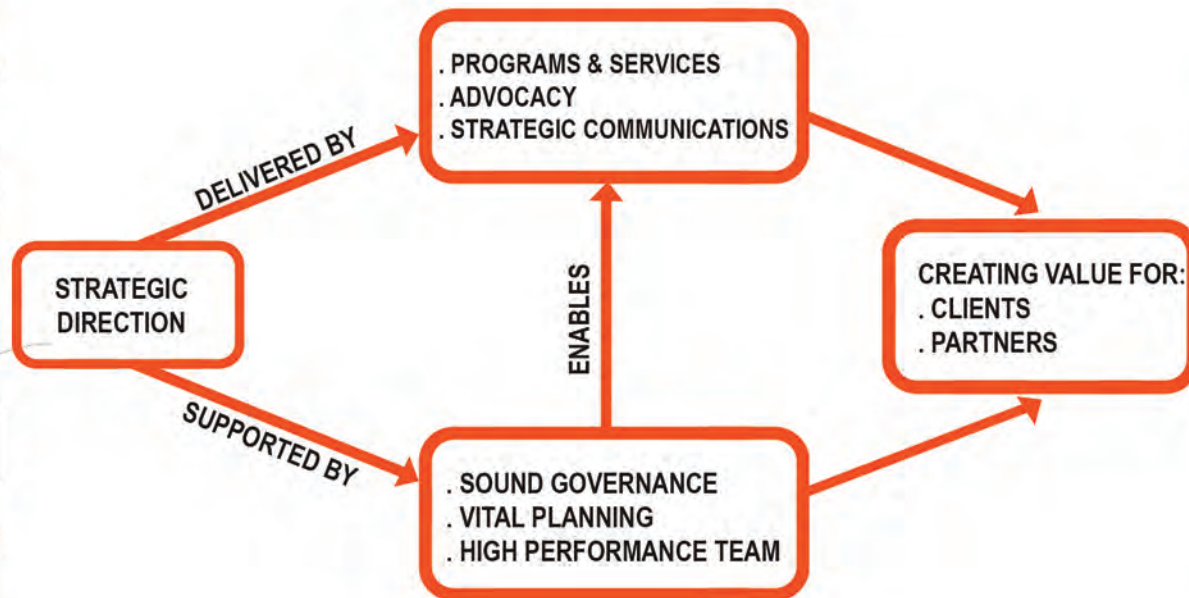
- Allows us to see the future as clearly as the past
- Enables us to focus on what's most important
- Reminds us to stay on course, in order to achieve the vision we set for ourselves



MODEL FOR NONPROFITS

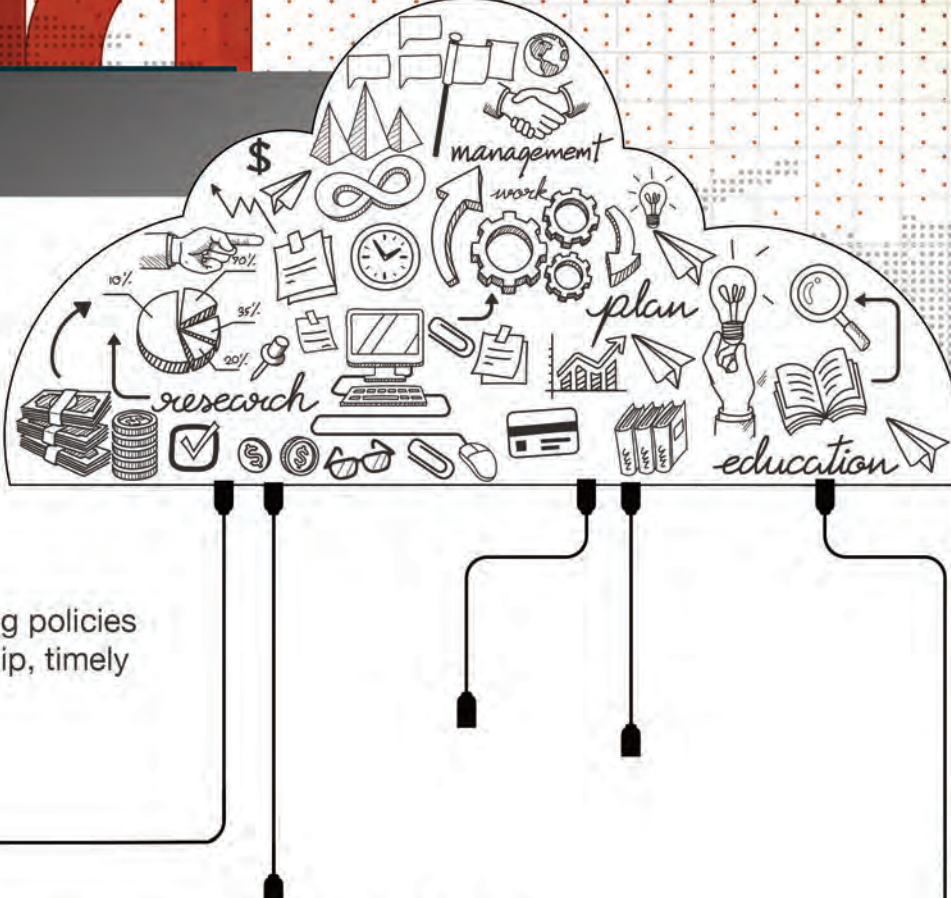
It often helps to create a context for our discussions. While models are simplistic representations of a very complex world, they can help frame our discussion.

THE FOLLOWING MODEL HIGHLIGHTS SEVEN ELEMENTS OF NONPROFIT SUCCESS:



Let's briefly examine each element to determine how they impact the ability of the organization to create value for clients and partners

MODEL FOR NONPROFIT



1

STRATEGIC DIRECTION

Create a strategic focus on “where we’re heading” and “how we’re going to get there”. Get your Board, staff and partners to “sing from the same song sheet” and focus on results - the right results.

2

SOUND GOVERNANCE

Strengthen the Governance structures, bylaws, operating policies and annual Governance cycle. Enable stronger leadership, timely decision-making and reduced frustrations.

3

VITAL PLANNING

Have effective budgets, work plans and project plans that are aligned to the strategic direction of the organization.

4

HIGH PERFORMANCE TEAM

Strengthen our staff and increase capacity by providing more certainty around roles, responsibilities and ongoing professional development.

5

DECISIVE PROGRAMS & SERVICES

Improve programs and services to clients so they are sustainable and deliver greater benefits to clients and partners.

6

ADVOCACY

Define the challenges facing our sector and triage our priorities. Build and implement advocacy strategies. At the end of the day it is about creating a positive environment for our clients.

7

STRATEGIC COMMUNICATIONS

Focus on three audiences. Our clients to achieve greater impacts. Our partners and other stakeholders to generate more awareness and support for our priorities. The Public to promote the benefits delivered by our organization to our clients.

CLIENT VALUE

Our clients are our “primary customers”.

Without them our organization does not exist.

We have clients because we can help solve client problems and satisfy client needs with value propositions.

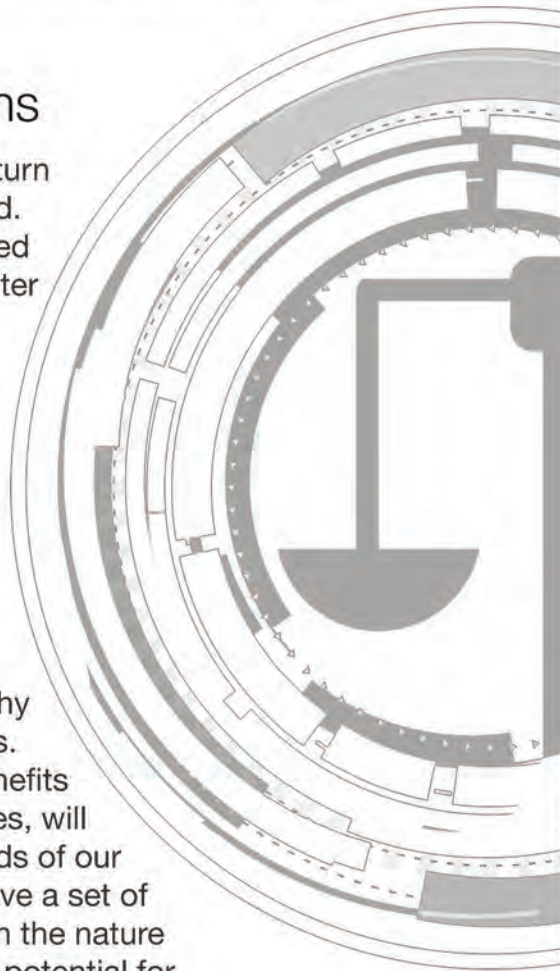
Concept of Value Propositions

The value proposition is the reason clients turn to us. It solves a problem or satisfies a need. Each value proposition consists of a selected bundle of programs and/or services that cater to a specific set of needs.

In this sense the value proposition is an aggregation, or bundle of benefits that the organization offers clients.

Value Propositions and Partners

The value proposition is likely the reason why our organization is attractive to our partners. The ability of our organization to deliver benefits to our clients through programs and services, will determine whether we are meeting the needs of our partners as well. However, we may also have a set of distinct offerings to our Partners; perhaps in the nature of our strategic relationship that makes the potential for partnership possible.



CLIENT VALUE

Client Value is primarily delivered through three of the Nonprofit Model Elements:

- Decisive Programs & Services
- Strategic Communications
- Advocacy on behalf of clients

The capacity to deliver Client Value is derived by:

- Strategic Direction
- Sound Governance
- Vital Planning
- High Performance Staff

Nonprofit Mastery means:

- Having the right staff, properly trained and equipped
- Working with focused and effective staff and volunteers that are accomplishing their goals
- Supported by a strong Board/Executive team providing direction; and
- Everyone having a relentless focus on achieving the agreed results





STRATEGIC FRAMEWORK PLANNING SESSION AGENDA

This highly interactive session will challenge us to think about and plan for success. Over the next two days we will participate in exercises that will assist us in developing a Strategic Framework for our Organization.

At the end of the session, we will discuss next steps.

SESSION 1 – AGENDA

Introductions

- Step 1 Our External Environment
- Step 2 A Perfect World
 - Our Organization with no constraints
- Step 3 A Practical World
 - What do we need to:
 - Keep Doing?
 - Stop Doing?
 - Start Doing?
- Step 4 A Promising World
 - A clear Vision
 - Pillars of Success
 - Strategic Intent
 - Strategic objectives
 - Key Initiatives

SESSION 2 – AGENDA

Introductions

1. Review and finalize the Strategic Intents
2. Review and finalize the Strategic Objectives
3. Review and prioritize Key Initiatives
4. Launching the Strategic Framework



EXERCISE

MOST ADMIRIED / LEAST ADMIRIED ORGANIZATIONS

Think about an organization that you most admire. What is one of the attributes that make it one of your most admired organizations?

MOST ADMIRIED ORGANIZATION

MOST ADMIRIED ATTRIBUTE

Think about another organization that you least admire. What is one of the attributes that make it one of your least admired organizations?

LEAST ADMIRIED ORGANIZATION

LEAST ADMIRIED ATTRIBUTE



A STRATEGIC FRAMEWORK

A STRATEGIC FRAMEWORK

The Strategic Framework is a critical touchstone to drive client value. It succinctly outlines where we are going, and how we are going to get there. It will help our Organization's Board, staff and volunteers to “sing from the same song sheet” and focus on results – the right results.

The Strategic Framework communicates the value it intends to create for its clients, partners and other stakeholders.

THE STRATEGIC FRAMEWORK INCLUDES FIVE KEY ELEMENTS



- 1. Vision Statement:** a brief description of our Organization of the future
- 2. Pillars of Success:** the core areas of our Organization's future success
- 3. Strategic Intent:** clarifies the meaning of each Pillar of Success and is particularly helpful for those that were not involved in this planning process
- 4. Strategic Objectives:** our organization's definition of success – outcomes we intend to achieve within specific timeframes
- 5. Key Initiatives:** priority actions for the medium term

The Strategic Framework combines the utility of a balanced scorecard with the power of a vision, as a touchstone for decision-making. It facilitates the articulation of outcomes and the identification of required improvements. In short, it demonstrates leadership.



AN STRATEGIC FRAMEWORK

STRATEGIC FRAMEWORK	VISION _____ OUR VISION STATEMENT			
PILLARS OF SUCCESS	PILLAR #1	PILLAR #2	PILLAR #3	PILLAR #4
STRATEGIC INTENT				
STRATEGIC OBJECTIVES	By _____, we will:	By _____, we will:	By _____, we will:	By _____, we will:
KEY INITIATIVES	<ul style="list-style-type: none"> • • • • • • 	<ul style="list-style-type: none"> • • • • • • 	<ul style="list-style-type: none"> • • • • • • 	<ul style="list-style-type: none"> • • • • • •

STRATEGIC FRAMEWORK

STEP 1

OUR EXTERNAL ENVIRONMENT

EXERCISE:

There are many significant forces at play that impact our ability to succeed and it is important to take stock of these as we plan for the future.

Consider the forces that impact our organization and the related opportunities and challenges.

In the space provided identify some of the more important opportunities and challenges facing our organization and our sector.

When you are done we will review them as a group.

