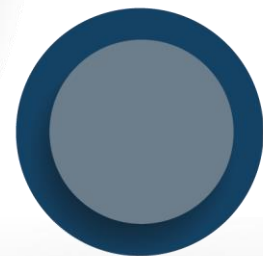


Planning to Plan

THE STRATEGIC PLANNING
PROCESS SIMPLIFIED



Réunir les
communautés régionales
D'EXPRESSION ANGLAISE DU QUÉBEC

Connecting
QUEBEC'S REGIONAL
ENGLISH-SPEAKING
Communities

Planning to Plan

The Strategic Planning Process Simplified

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Québec 





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Why should an organization develop a strategic plan?

A strategic plan adds value to an organization by giving it a road map with a clear sense of direction and outlining measurable goals along the way; a tool for guiding day-to-day decision-making, evaluating progress, and adjusting actions as the organization moves forward.

Designing a strategic planning process

A **BEST PRACTICE** is to keep the following in mind at the outset of the processes' design:

- How to identify the participants?
 - Who to gather input and feedback from?
- What level of participation is desired and for whom?
 - Survey?
 - Focus group?
 - Working committee?
- Communications.
 - How will the organization reach each target audience or promote each method of data collection?
- Available resources.
 - Human
 - Financial
 - Technological/Infrastructure
- Timeline.
 - Data collection
 - Data analysis
- Drafting and finalizing the strategic plan.
- Dissemination.

How to identify the participants

It's important to solicit input from diverse sources as part of the strategic planning process because organizations have different kinds of relationships with, and obligations to, a variety of individuals (registered members, a specific segment of the population such as parents, etc.) and instances (institutions, partner organizations, etc.). Everyone's feedback and input are important to having a complete picture.





Who an organization reaches out to for input during its strategic planning process depends on the stage it is in the process, what type of information it's looking for and what it is trying to learn from that data. Depending on the organization's mission, mandate, and service offer (if applicable), there are a few common profiles of strategic planning participants:

- Members of the organization
 - Staff
 - Members of the board of directors
 - Volunteers
 - Student interns
 - Individuals who are registered as official members
- Users/beneficiaries
 - Individuals who attend activities offered by the organization or benefit from its services but are not registered members of the organization
- Members of the community the organization is mandated to work on behalf of but who are not members or users/beneficiaries
- Organizational partners
 - Other community organizations that are regular collaborators
 - Educational institutions the organization collaborates with
 - Other important community stakeholders

What is the organization trying to learn?

From members (not limited to):

- Reason for membership
- Length of membership
- Frequency of participation in activities, events, and/or service offer
- Their communications preferences (how they like to consume information)
 - Social media, web-based, email, print, etc.?
- Suggestions for new activities/services/orientations for the organization to pursue
- Feedback on preliminary/draft objectives

From users/beneficiaries (not limited to):

- Reason they are not a registered member
- Frequency of participation in activities, events, and/or service offer
- Their communications preferences (how they like to consume information)
 - Social media, web-based, email, print, etc.?

- Suggestions for new activities/services/orientations for the organization to pursue
- Feedback on preliminary/draft objectives

From non-member and/or non-user/beneficiaries but who are members of the organization's target population:

- Their level of knowledge about the organization and its mission, mandate, activities in the community
- What might cause them to join as a member, attend an activity/event, or use a service
- Their communications preferences (how they like to consume information)
 - Social media, web-based, email, print, etc.?
- Suggestions for new activities/services/orientations for the organization to pursue
- Feedback on preliminary/draft objectives

From organizational partners (not limited to):

- The status of the partnership of collaboration
 - Current or past?
 - If it's in the past, why?
- Their level of satisfaction with the partnership/collaboration
- Frequency of participation in activities, events, and/or service offer (if applicable/appropriate)
- Their communications preferences (how they like to consume information)
 - Social media, web-based, email, print, etc.?
- Suggestion for future partnerships or collaborations
- Feedback on preliminary/draft objectives



Make sure to include knowledge products like community profiles and community consultation reports that contain data pertinent to the organization's mandate in the data collection and analysis stages.

What level of participation is desired and for whom?

Not every participant in the organization's strategic planning process will contribute in the same way, some may participate in one stage while others may participate in one or more stages. How the different categories of participants contribute usually corresponds with their existing level of engagement with the organization.





Data collection

Survey

A digital survey distributed via email or electronic newsletter is an effective way to approach participants that the organization has a prior relationship with directly. Using a program like SurveyMonkey (free and paid options) or Mailchimp (free and paid options) to design and distribute the organization's survey can facilitate data collection and analysis further along in the process; digital surveys can also be distributed through social media. Surveys can be distributed using paper copies as well however, their data must be added manually to the data being collected digitally. It is important to validate with participants that they haven't already completed the survey online before they fill it in. Survey questions should correspond to what the organization hopes to learn and account for the different profiles that might be filling it in (i.e., use 'skip to' logic depending on certain answers to direct participants towards the parts of the survey that apply to their profile).

Focus groups

Focus groups are a good option for organizations to gather more information about a specific trend or issue that emerges during an earlier stage in the strategic planning process. Inviting different categories of participants to provide their input and feedback in small discussion formats can enrich the organization's understanding of the trend or issue and give it the opportunity to address the matter formally as part of its new strategic plan. Focus groups can also be used to validate preliminary or draft objectives with different participant profiles at various stages in the planning process. It is a **BEST PRACTICE** to keep focus groups to six or seven participants plus a facilitator and a note taker (8-9 people total) and to use pre-established questions to break the ice and guide the conversation; this is especially important when there is more than one focus group and a need to combine data for analysis.

Working committee

Depending on the organization's internal structures (strategic planning committee, for example), it may or may not need to strike an ad-hoc working committee to manage the different stages of the strategic planning process. This will vary from one organization to another. The strategic planning working committee can be comprised of members of the organization's board of directors, staff members, or volunteers; some organizations prefer to bring in an external support to assist with the design of their process and the development of their strategic plan.

Communications

As mentioned in relation to the survey method of data collection, email and electronic newsletters are simple ways to communicate directly with participants that the organization already has a relationship with. Paper copies of the survey can be distributed via mail to capture data from those that are not able to participate online as well as given out to those who are in physical attendance at activities and events (just be sure to validate that they haven't completed it online first).

The organization's strategic planning process can be promoted via an organizational newsletter explaining the exercise to members and partners and inviting their participation; it can be promoted through a variety of traditional media as well (local newspaper, community radio, bulletin boards, etc.) depending on where the organization is in the process/data collection.

Communications are also an important aspect related to disseminating the organization's completed strategic plan among its members, partners, stakeholders, and the wider community.

Available resources

The design of an organization's strategic planning process should consider the human, technological, and financial resources at its disposal and reflect its capacity while respecting its limitations. Some **BEST PRACTICES** for organizations that have limited funds or capacity but are interested in developing, or required to develop, a strategic plan include:

- Including the development of a survey, focus group questions, or other elements related to the various stages of the strategic planning process in the tasks of a summer student whose salary is subsidized or paid in full by a federal or provincial grant
- Using the free options for online survey creation/distribution programs
- Creating a partnership for local/mail distribution (*Publisac*, local newspaper, city newsletter, school board, etc.) to save on postage if mailing out paper copies of a survey or only distributing paper copies at in-person activities/events.





Timeline

It's important for an organization to establish the timeline within which it needs to start and complete its strategic planning process. Once the time frame has been established, an action plan for the accomplishment of its various stages can be developed (by a strategic planning committee, ad-hoc working committee, or supporting consultant depending on the organization's internal structures or preferences).

The strategic planning process can be timed with the renewal of an important funding envelope such as Core funding or a government investment initiative such as the federal Action Plan for Official Languages. The timeline for developing its plan and the length of the strategic plan itself is at the discretion of the organization, unless the production of a plan by a prescribed deadline is part of a funding agreement the organization has committed to. Be sure to include sufficient time for data collection and analysis in the design of the strategic planning process. The length of time a survey is available for people to complete, for example, may influence the number of participants and the amount of data collected.

Drafting and finalizing the strategic plan

The result of the strategic planning process is a guiding document that presents a clear sense of direction and outlines measurable goals along the way. There are typically two versions on an organization's strategic plan:

- A. An external one for public presentation and dissemination that presents the organization's mission/mandate, strategic objectives, and targeted results per objective per year of the plan in a summary or high-level format;
- B. One that includes the external version but also has annual action plans per objective that are used internally to track progress and that are reviewed annually to adjust orientations and future actions based on the results achieved in the previous year.

Annual action plans per objective are most often developed as a spreadsheet with a header pronouncing the objective in question and year of the plan and with columns tracking the targeted results and expected outputs/outcomes vis à vis the activities planned to accomplish them and their timeline for completion. Some organizations choose to include a column for the staff member or volunteer responsible for the activities as well as one to add qualitative details to the organization's quantitative results.

The following is an example of a row in an annual action plan linked to one of the strategic objectives and targeted results from the sample external strategic plan found at the end of this document.

Example: Annual action plan developed for internal use and tracking

| Objective #1 Access to government services in English 2022–2023 | | | | |
|--|---|--|-------------------------|---------------------------------------|
| Targeted result: | Performance indicators (outputs & outcomes): | Planned activities: | Schedule of activities: | Explanation of results or challenges: |
| To engage in initiatives and activities that increase support and recognition of the English-speaking community's need to benefit from programs offered by the federal and provincial governments | At least one meeting is held with the regional rep. for Service Quebec Meeting agenda(s) & notes | Promote the service needs of the ESC in the region to decision-makers and stakeholders | Sept–Dec 2022 | |

As the organization operationalizes its strategic plan, the spreadsheet is updated with the results per planned activity (typically using a different colored text so that the results stand out clearly from the original planned elements).

Example: Annual action plan updated with actual results for a reporting period

| Objective #1 Access to government services in English 2022–2023 | | | | |
|--|--|---|-------------------------|--|
| Targeted result: | Performance indicators (outputs & outcomes): | Planned activities: | Schedule of activities: | Explanation of results or challenges: |
| To engage in initiatives and activities that increase support and recognition of the English-speaking community's need to benefit from programs offered by the federal and provincial governments | At least one meeting is held with a local or regional rep. for federal and provincial service providers Meeting agenda(s) & notes | Promote the service needs of the ESC in the region to decision-makers and stakeholders in strategic government departments 1 mtg with Service QC on October 12, 2022 | Sept–Dec 2022 | The Service QC representative was receptive to the information presented by the ED re: ESC needs. A follow-up meeting is planned for Winter 2023 |





Dissemination

It is important that the external version of an organization's strategic plan is easily accessible, and a great way to do so is in a resource section of the organization's website where it can be downloaded with the click of a button.

To ensure good understanding of the strategic plan internally, it is important that the organization's leadership thoroughly communicate the operational plan to members of the board of directors, volunteers, and staff. A clear understanding of the strategic plan and the actions the organization will undertake to achieve them over time allows the volunteer base and work team to focus on their part in implementing the whole plan and can bring everyone's strengths to the table in getting them accomplished.

A strong communication strategy linked to the dissemination of the organization's strategic plan will help ensure information is shared equally across the organization and wider community, contributing to a sense of transparency and potentially increasing trust in the organization's capacity to serve its target population among stakeholders.



Launch the external version of the organization's new strategic via press release.



Include a copy of the external version of the organization's strategic plan in a general media kit available on its website.



Include a copy of the external version of the organization's website in new staff and board of director onboarding kits.

STRATEGIC PLAN

2022-2025



English-speaking
Community
Organization

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MISSION & VALUES

THE MISSION OF THE ENGLISH-SPEAKING COMMUNITY ORGANIZATION IS:

To represent the members of the English-speaking minority language community in the territory that we serve for all matters related to their empowerment and vitality.

THESE VALUES INFORM HOW THE ENGLISH-SPEAKING COMMUNITY ORGANIZATION FULFILLS ITS MISSION:

Organizational decisions are made using feedback and input obtained through community needs assessments, consultations, demographic analyses, evidence based scholarly research, and other knowledge-gathering methods.

The programs and various initiatives offered by the organization are done so within the context of its mission and are appropriate within its mandate

Programs are reviewed regularly and evaluated vis a vis their objectives to ensure the respect of individual funding agreements and the organization's effective response to the needs of its community.



2022-2025 STRATEGIC OBJECTIVES

ACCESS TO GOVERNMENT SERVICES IN ENGLISH

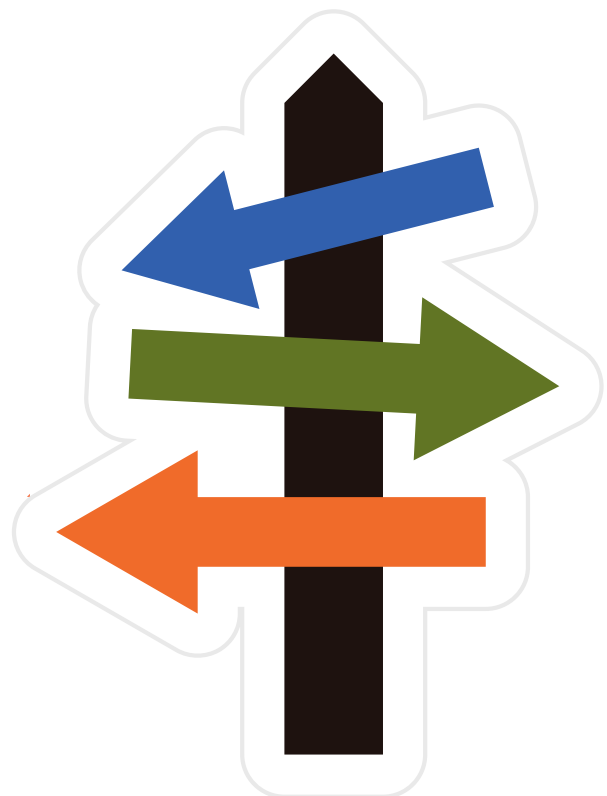
To support access to government services for English-speakers in the region by making the community's needs and issues known to service providers and government stakeholders.

EMPLOYABILITY & ECONOMIC OPPORTUNITIES FOR ENGLISH-SPEAKERS

To engage in initiatives and offer programs that support and promote the employability of English-speakers in the region and/or create opportunities for their employment and prosperity.

STRENGTHENED ORGANIZATIONAL CAPACITY

To ensure the English-speaking minority language community in the region is served by an organization with solid foundations and that has the capacity and expertise to support the community's needs.



ACCESS TO GOVERNMENT SERVICES IN ENGLISH

TARGETED RESULTS



2022-2023

To engage in initiatives and activities that increase support and recognition of the English-speaking community's need to benefit from programs offered by the federal and provincial governments.

2023-2024

To support the government service providers in the region in their efforts and ability to respond to the needs of the region's English-speaking minority language community by creating effective partnerships and dynamic collaborations with stakeholders.

2024-2025

To promote the government services adapted to and available for the English-speaking minority language community in the region and support their providers in the continual improvement of the services offered and the adaptation of new ones.

EMPLOYABILITY & ECONOMIC OPPORTUNITIES FOR ENGLISH-SPEAKERS

TARGETED RESULTS



2022-2023

The region's English-speaking community is supported by partner and stakeholder resources that promote employment skills, educational success, and post-secondary opportunities in the region.

2023-2024

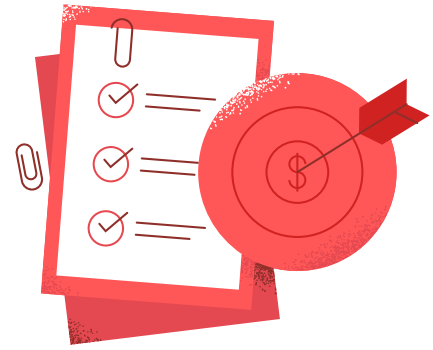
English-speakers in the region's minority language community benefit from initiatives developed through a strategic network of partners working to support the development of economic, entrepreneurial, educational, and networking opportunities in the region.

2024-2025

The English-speaking minority language community in the region is empowered by employment and economic support services that are increasingly informed of and adapted to meet its needs.

STRENGTHENED ORGANIZATIONAL CAPACITY

TARGETED RESULTS



2022-2023

The English-speaking Community Organization develops the capacity to take on a leadership role in the building of partner and stakeholder relationships.

2023-2024

The region's English-speaking minority language community is served by an organization that is increasingly recognized for its expertise on ESC matters in the region and is engaged in diverse initiatives with multiple partners and stakeholders.

2024-2025

The English-speaking minority language community in the region benefits from the English-speaking Community Organization's improved ability to access public resources and attract government investments to the area.



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