

# Strategic Planning (in interesting times)

**Presentation to Saskatoon Society of Fund Raising Executives  
October 6, 2021**

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# Today's Focus

**What is the role of strategic planning for non-profit organizations?  
What are some frameworks and resources to build on?**

# Introductory Chat Burst

Type in the chat box (but don't send yet!) the answer to the following question:

**What's the first word or phrase that comes to mind when you see the phrase "Strategic Planning"?**

# Strategic Planning



# A Traditional Strategic Plan ...

- Created by Board of Directors together with senior leadership, often with external support
- Looks at a 2-5 year timeframe
- Typically includes:
  - An organization's mission, vision, core values / principles
  - Strategic priorities, goals, objectives
  - (Potential) Actions, timelines, responsibilities
  - Key metrics, indicators, outcomes

Vision

Priorities

Goals

Actions

# Strategic Planning - What is it good for?

- Key purpose is to answer 3 questions:
  - Where are we currently?
  - Where do we want to go?
  - What do we need to get there?
- Help ensure that organizations are effective (Chait et al)
- Provide direction along the way and indicators of progress
- Inspire internal and external stakeholders



Source: "Roadmap" by Charles Nadeau  
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COVID-19 upended everything ...

# ... But it's not our first or only challenge

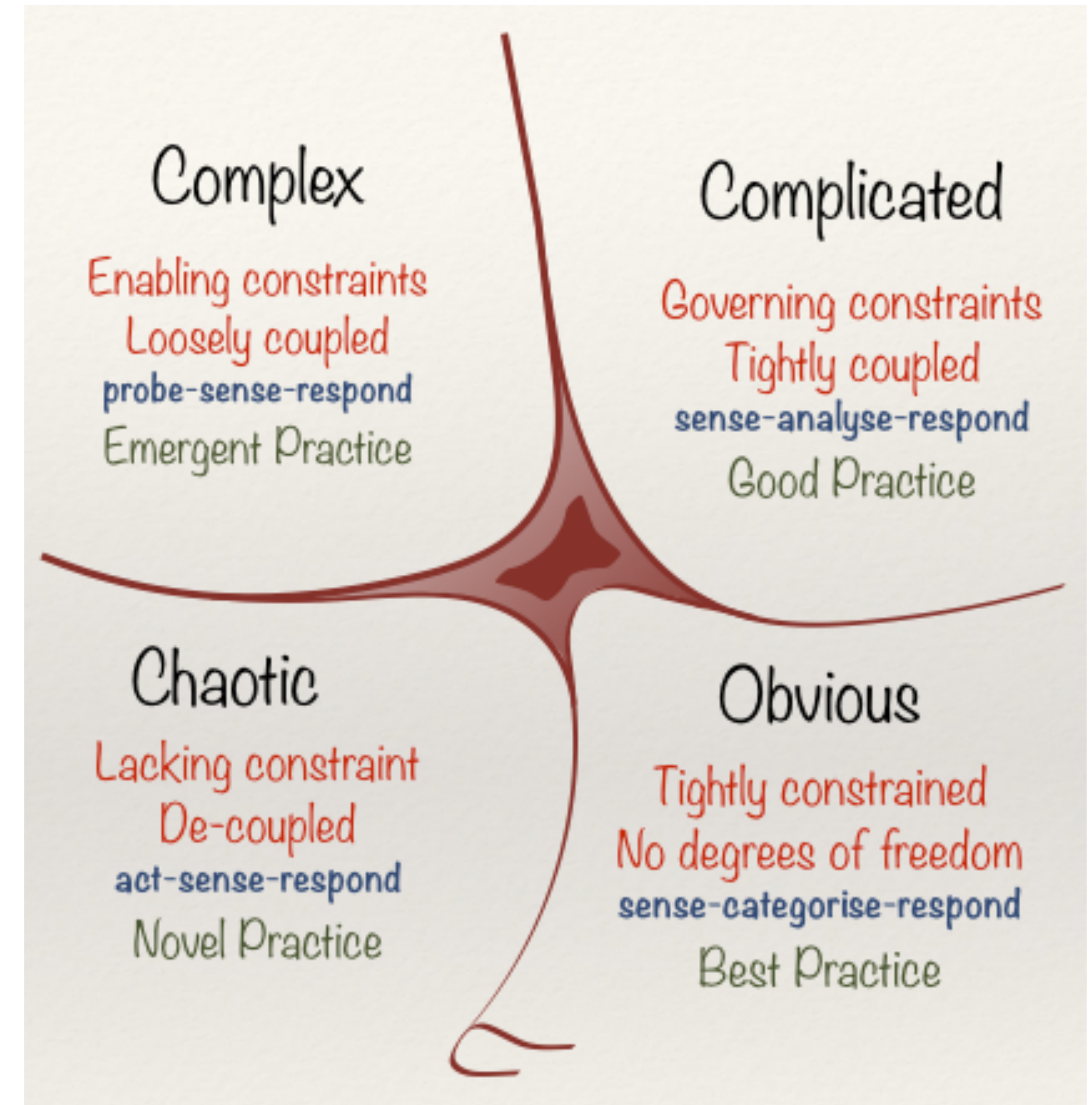
- Climate change
- Growing income inequality
- Mental health and addictions crises
- Increased awareness of the harm of racism and white supremacy
- New technologies
- Community demographic shifts
- Responding to TRC Calls to Action, MMIWG, UNDRIP
- Shifts in funder and donor priorities and interests
- Increased interest in collaborative / multi-partner work



How do we plan in these  
circumstances?

# 1. Use the Right Frame

- Cynefin (ka-NIF-en) Framework
- 4 quadrants
  - Obvious (Simple)
  - Complicated
  - Complex
  - Chaotic
- Different approaches to addressing each



Source: "Cynefin as of 1st June 2014" by user "Snowded".  
[https://commons.wikimedia.org/wiki/File:Cynefin\\_as\\_of\\_1st\\_June\\_2014.png](https://commons.wikimedia.org/wiki/File:Cynefin_as_of_1st_June_2014.png)  
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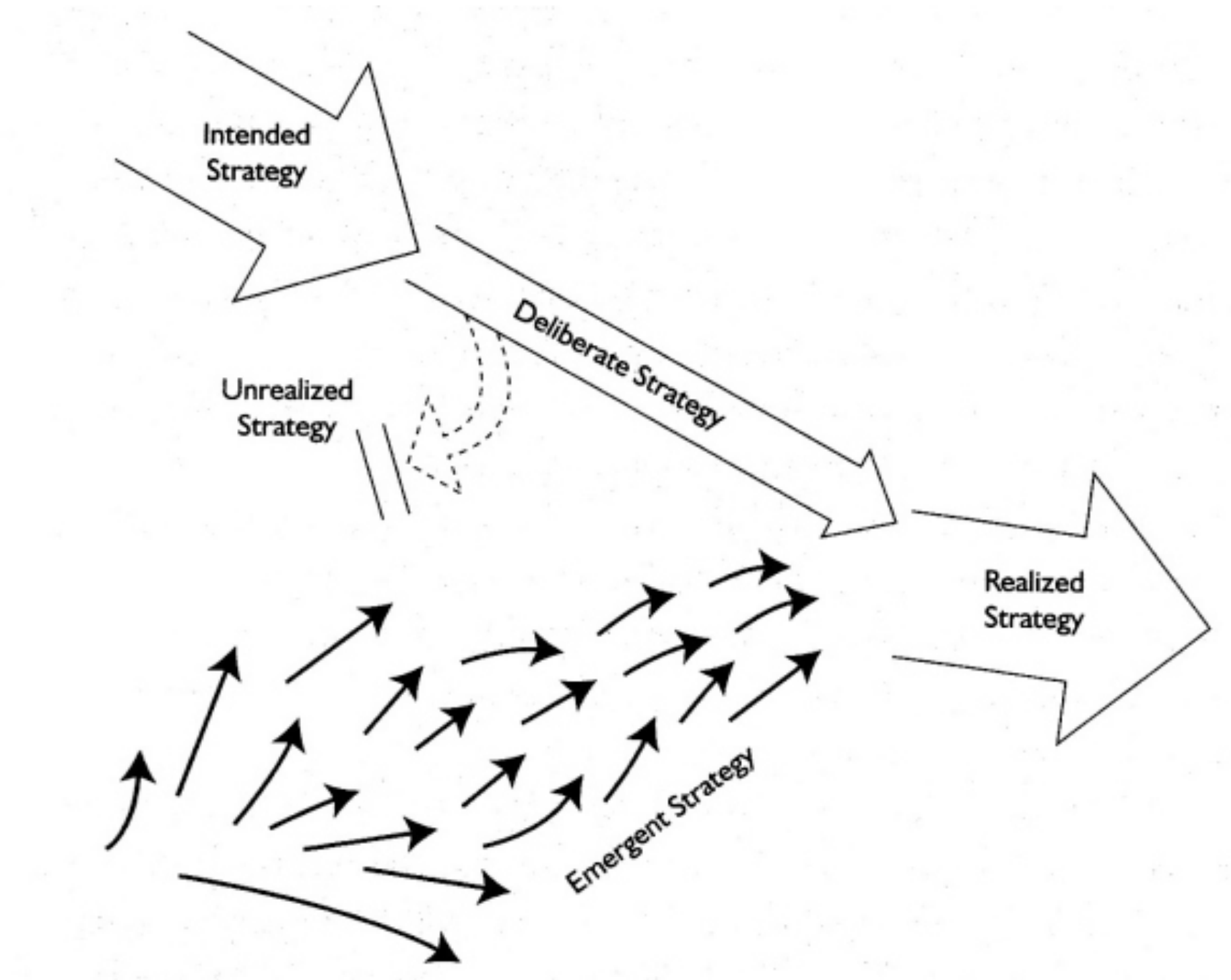
## 2. Follow your North Star



- Identify (or re-affirm) the key guides for your organization
  - **Mission:** What you do, for whom, and how
  - **Vision:** Your ultimate goal (for organization, community, or world)
  - **Core Principles / Values:** Guidance on how to think about or approach a situation (Patton, 2018)

# 3. Be Open to Emergence

- Gulf between our intended and realized strategy (Mintzberg)
- **Emergent Strategy** - less about control and more about working with what is and imagining what could be (brown, 2017)
- Be on the lookout for unanticipated opportunities and challenges
- Recognize that cause and effect is nonlinear (butterfly effect)

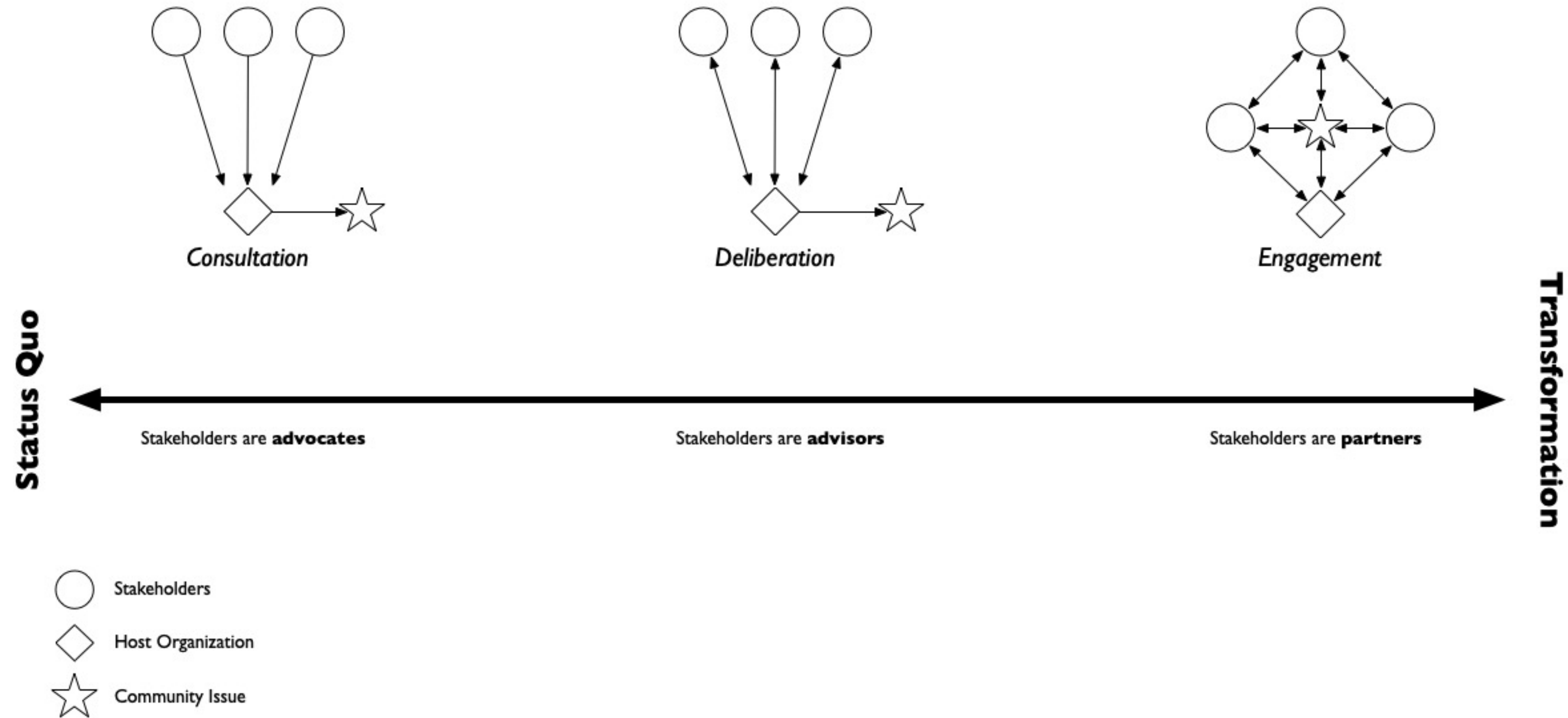


# 4. Prioritize Learning

- **“There are only two mindsets that can infiltrate an organization: control, or learning.”** (Senge)
- Regular review and evaluation to assess progress
  - Caution: Do not rely overly on one indicator!
- Developmental Evaluation (Patton, 2011)
  - Combining evaluation, complexity, and planning
  - Focus on supporting innovation

# 5. Engage With Your Community

- Consultation vs Engagement (Lenihan)
- Understanding issues and seeing solutions from multiple perspectives (“unusual suspects”)
- Increased emphasis on collaboration and contribution over attribution



# Strategic Planning

**(In interesting times)**

- Use the Right Frame
- Follow your North Star
- Be Open to Emergence
- Prioritize Learning
- Engage with Your Community

# Resources

- brown, a.m. (2017). Emergent strategy: shaping change, changing worlds.
- Chait, R.P., Ryan, W.P., & Taylor, B.E. (2008). Governance as leadership: Reframing the work of nonprofit boards.
- Lenihan, D. (2009) Rethinking the public policy process: A public engagement framework.
- Patton, M.Q. (2008). Developmental evaluation: Applying complexity concepts to enhance innovation and use.
- Patton, M.Q. (2018). Principles-focused evaluation: The guide.
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