



Society of Animal Welfare Administrators 2018 Management Conference

Strategic Planning Reimagined – part 1

June 8, 2018
10:45am -12p

Dr. Robin Hindsman Stacia
Governance and Leadership Consultant

Sage Consulting Network, Inc.

1



Dr. Robin H. Stacia
robin@sageconsultingnetwork.com
www.sageconsultingnetwork.com
404 . 973 . 0233

PRINCIPAL
Sage Consulting Network, Inc.

BOARDSOURCE
Senior Governance Consultant

STANDARDS FOR EXCELLENCE
An Ethics And Accountability Code For Nonprofit Organizations

CLINICAL PSYCHOLOGIST
Previous Healthcare Performance Executive

LEAN SIX SIGMA PROCESS IMPROVEMENT
Green Belt



Sage Consulting Network, Inc.

2



Today's Objectives

1. Understanding the strategic planning context,
2. Understand the key elements of any strategic planning process,
3. Reimagine the process to achieve a plan that reflects adaptability, flexibility and innovation; and,
4. Understand how to ensure implementation by focusing on sustainability factors that guide the process.

Introductions:

“consider your experiences with strategic planning”

Introduce yourself to one person and thinking about your experiences with strategic planning –
successes and failures:
or no prior experiences

What *one* thing contributed towards strategic planning *success*
and one thing contributed towards its *failure*?

The Strategic Planning Context

Sustainability - Leadership Imperative

Stability: is a basic level of health or reliability in an organization or an entity. It means that you have enough resources, sufficient strategy etc. for security in short to midterm.

Sustainability – involves having strong organization or “business” systems & practices in place that enable the organization to become or continue to be a high-value community asset over the long-term.

Priority Actions -Sustainability

- Is achieved by systems, practices, policies, and processes.
- Requires an intentional continuous process –ensure strong performance

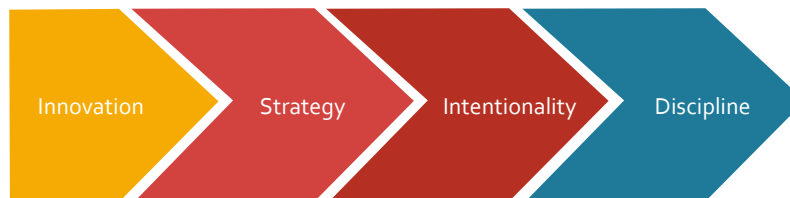


Mission -Strategy
 Organizational Structure
 Business Model
 Funding Plan
 Partners - Stakeholders
 Leadership Succession
 Board Effectiveness
 Staffing Model
 Accountability
 Communication
 Public Image
 Org Culture
 Continuous Improvement

7

Sustainability-Key Influencers

Nonprofits –critical to future economy



8



strategic planning requires constructive partnership

Governing Boards...

Come in a variety of structures, compositions, etc., but are always where the proverbial “buck stops”:

- Granted authority by state and supporters to represent public trust and ensure the organization carries out the purposes for which it was established in a responsible and accountable fashion.
- Where organization’s legal responsibilities rest.

LWI 2017- Ratings of Performance Board Responsibilities

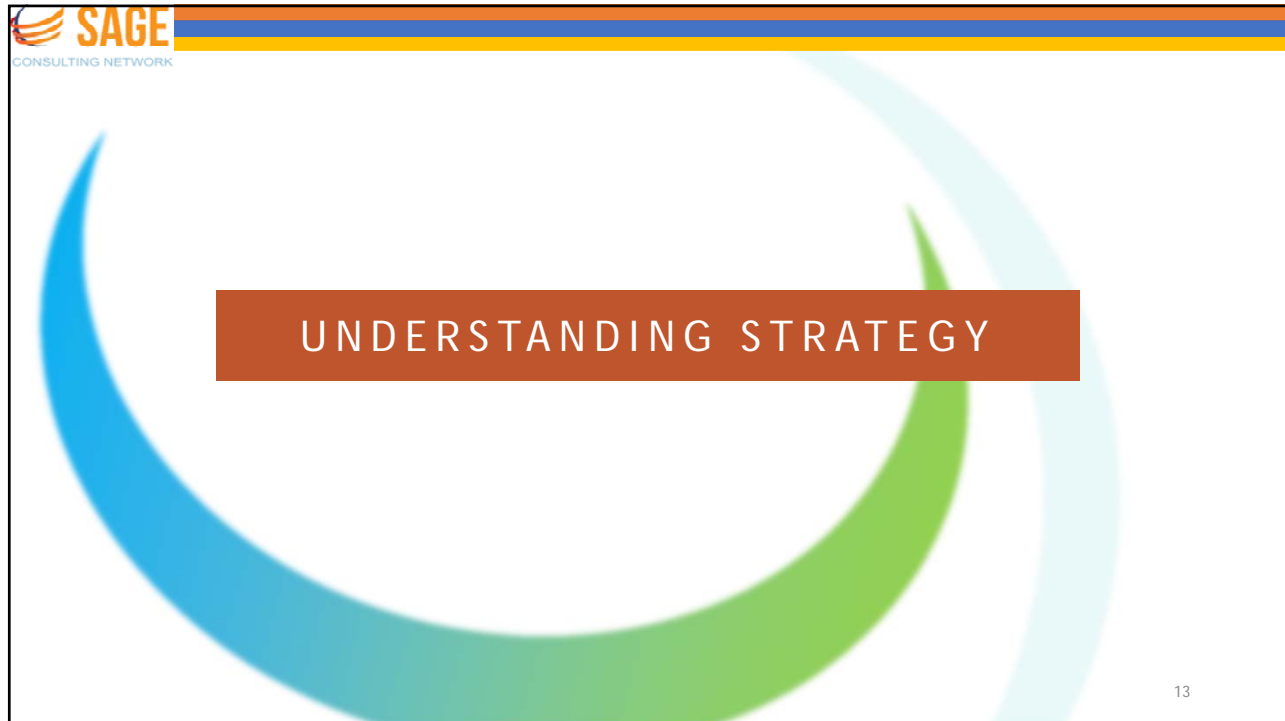
	Area of Board Performance	Average Grade from Executives	Average Grade from Chairs
Strength	Understanding mission	A-	A-
	Financial oversight	B+	B+
Solid Performance	Legal & ethical oversight	B	B+
	Guiding & supporting the chief executive	B	B+
	Level of commitment & involvement	B	B+
	Knowledge of programs	B	B+
	Understanding board roles & responsibilities	B	B
	Thinking strategically as a board	B	B
	Adopting & following a strategic plan	B-	B
	Evaluating the chief executive	B-	B
	Monitoring performance against strategic plan	B-	B
	Community-building & outreach	C+	B
Challenge Areas	Monitoring legislative & regulatory issues	C	B-
	Increasing board diversity	C	C+
	Fundraising	C	C+

11

Activity

Rate your board's performance: A - C:

Thinking strategically as a board
 Adopting & following a strategic plan
 Monitoring performance against the strategic plan



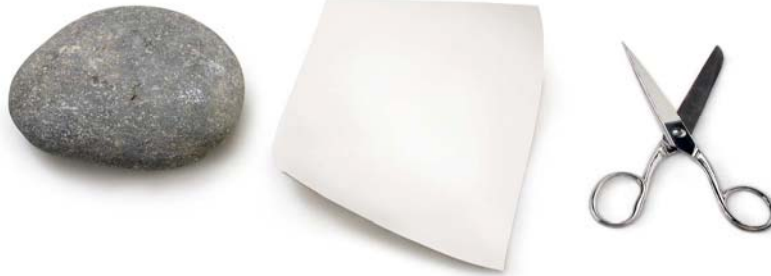
Strategic Planning

Strategic planning is the practice of looking forward, outside the immediate future for your organization, to reach a particular set of goals.

It also involves laying out—step-by-step—how you’re going to get there.

Sage Consulting Network, Inc. 14

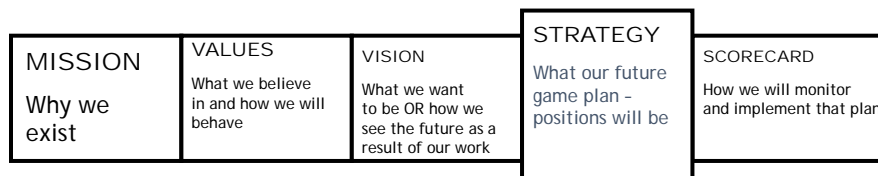
Activity : Write an example of a strategy?



Sage Consulting Network, Inc.

15

How the Strategy Statement Fits with Other Statements



THE BASIC ELEMENTS: ←

Objective
 Scope
 Advantage

What is Strategy?

- **Strategy:** is the positioning of your organization's focus towards success. This is at the organizational level.
 - System- Design Perspective
- **Objective:** is "the" something that you're trying to achieve
 - Describes a marker of success
- **Action:** what you're going to do to achieve the objective – implementation
 - takes place at the individual level – group level

Winston Churchill (1874 — 1965)

"Plans are of little importance,
but planning is essential."



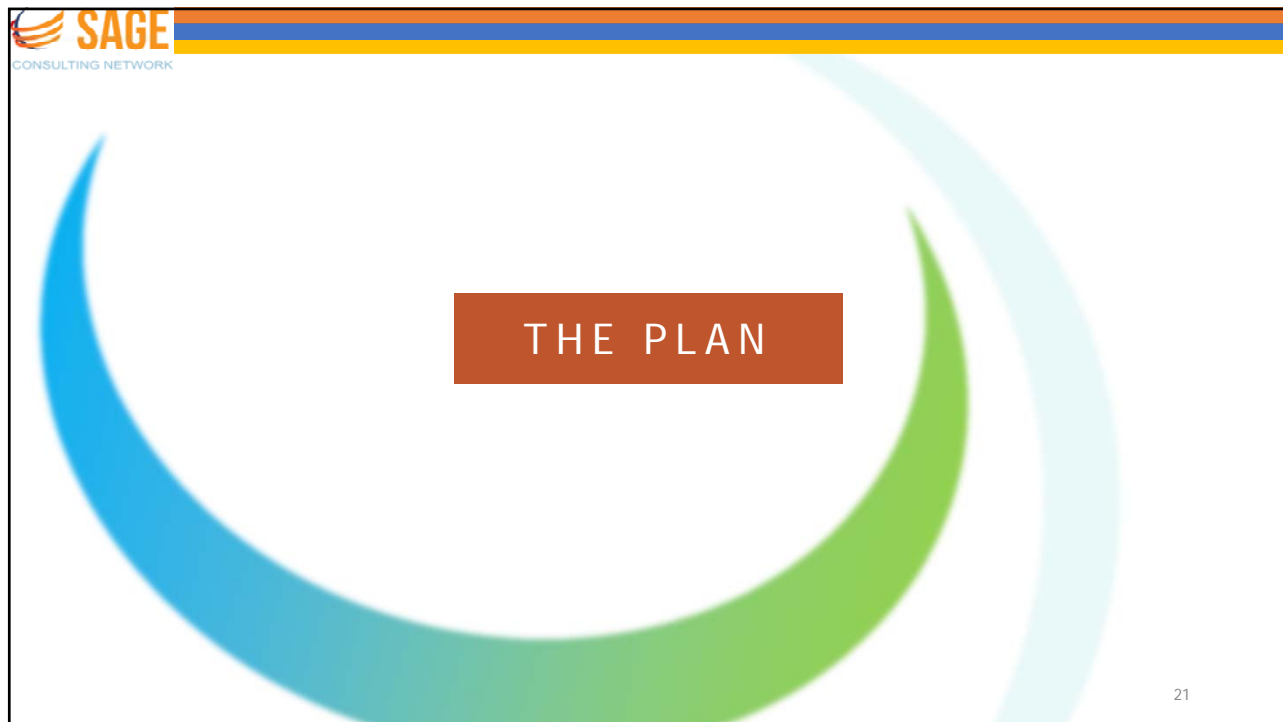


Strategic Planning – Best Practice Process

- Start by clearly defining the “planners roles”.
- Has to include a fresh approach to achieving the Vision for the organization- need a Vision.
- Leaders and managers are critical to the process.
 - include soft insights from personal experiences
 - Understanding of the hard data from market and performance
- Stakeholder experiences gathered throughout the organization.
- Need catalyst that aid and encourage participants to think innovatively – not just reshuffling the same issues.

Strategic Planning - Best Practice Process

- Be visionary and competitive – this is about organizational positioning and impact.
- It’s a method to identify disagreements and options.
- Planning is most effective - includes *analysis*:
 - “about breaking down a goal or set of intentions into steps, formalizing those steps so that they can be implemented almost automatically, and articulating the anticipated consequences or results of each step”.
 - (Michael Porter- The Economist)



21

The Strategic Plan (document)

- A guidance tool – a work in progress.
- It's fluid and often uncertain – living & breathing documents.
- It helps you craft the organization's position.
- Creates a platform from which changes is supported and encouraged.
- Ensures the focus on organization and stakeholders are primary.
- Clarifies all roles – organizational, departmental, individual
- The Plan- requires consistent refresh – determine the frequency and responsible committee



Communicate the Strategies

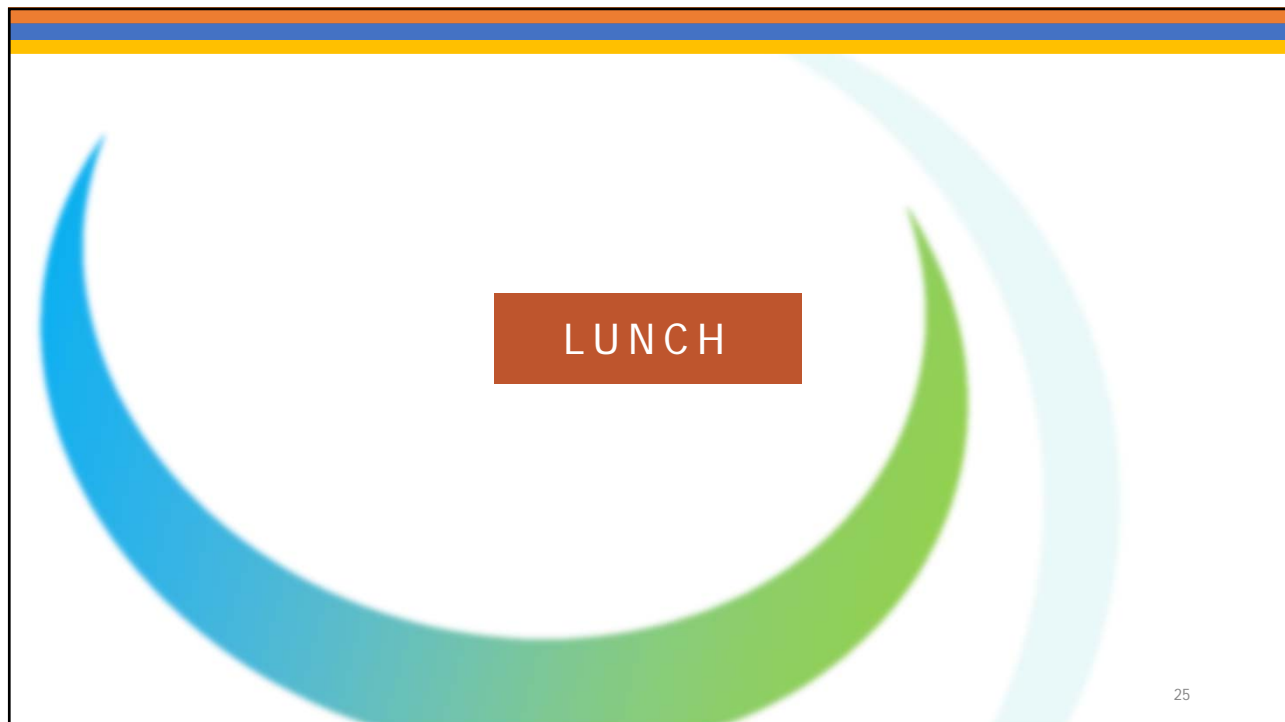
Once you've fine-tuned your strategy plan, share it with the entire organization.

The benefits:

- Aligned behavior
- Empowered employees
- Increased effectiveness



Discussion



Society of Animal Welfare Administrators 2018 Management Conference

Strategic Planning Reimagined – part 2

June 8, 2018
1:30- 3:00pm

Dr. Robin Hindsman Stacia
Governance and Leadership Consultant

Strategic Planning : Mission & Vision Matters

Is your **Mission Statement** accurate and relevant?

When was it last reviewed?

Vision Statement- a guiding inspirational image of the future that will be created by the impact of your organization.

Does your organization have a Vision Statement?

Is it accurate and relevant?

Data Matters

- **Internal Data**
 - Board – Leadership Team –Employees – Volunteers
 - SWOT – strengths, weakness, opportunities, threats
- **External Data**
 - Performance –Stakeholders- Community
- **Community Needs Data**
 - Data related to your issues
- **Analysis**

Data

What does your organization's **Current Data** ?
How varied are your source of data?

What's the desired **Future** of your Mission based
on data?

Vision Statement

- A vision statement describes the future aspirations of the organization – either internal level of performance and/or external impact.
- It defines the dream, the long-term goal, and the unconditional direction where the organization is heading.
- The statement is not tied to future funding, obstacles of any kind, or present availability of resources.
- Typical issues to creating a strong Vision is shortsightedness and lack of innovation and creativity.

Visioning

What's the Current State?

What's the desired **Future State**?
Write your Vision for the desired future state



Strategic Leaders

- How is strategic thinking or planning demonstrated?
 - top down vs collaborative teams
- Are there catalyst for change? How are they (it) treated?
 - We tried that already vs what can we do differently, how can we refresh?
- Are there fresh ideals or reshuffling of old concepts?
 - (Uber vs Taxi, Blockbuster vs On Demand)

Strategic Mindset

- Does your organization care about being a winner? Is there a competitive edge?
- Is it safe and acceptable to disagree? Are counter opinions and alternative approaches tolerated?
- How does your organization deal with emerging priorities, urgent considerations and opportunities?

Sage Consulting Network, Inc.

33



Sustainability-Key Influencers

Nonprofits –critical to future economy



34

Design your organization's Strategic Planning Process

Sage Consulting Network, Inc.

35



PRESENTATIONS AND DISCUSSION

36



The Road Ahead...

Sage Consulting Network, Inc.

37




Dr. Robin H. Stacia

robin@sageconsultingnetwork.com

Phone: 404.973.0233

 www.linkedin.com/in/robinhstacia

 www.sageconsultingnetwork.com

 <http://standardsforexcellence.org/robin-stacia/>

Sage Consulting Network, Inc.

38