

Workshop Outline: Strategic Planning Coordination Level 2

Workshop Objectives:

- By the end of the session you will be able to make your own strategic plan, either on a project or organizational level

Audience:

- 5 - 25 participants, post-secondary level
- Different experience levels
- Hands on!!

Materials:

- Flip Chart
- Markers
- Hand-out

Total Time: 2.5 – 4.5 hours

Opening activity: (15 minutes)

- Everyone breaks into groups of 3-5 and tells a story of a project that didn't go as well as anticipated or a group that fell apart. (7 minutes)
- Without giving detailed instructions, chose one group, ask them to come to the front, and have them tell one story – only – each member is allowed to say one word and **only** one word – without planning or talking to each other first! (3 minutes)
- Debrief with the group – (5 minutes)
 - What just happened?
 - Variables that came into play: not enough time, not sure which story to tell

Why is strategic planning important? (10 minutes)

- Brainstorming on flipchart

Elements of a strategic plan (25 minutes) – see 'differences and definitions' below

- Who has done a strategic plan before, and what did it look like? (10 minutes)
- Put on flipchart
- Refer people to hand-out as one approach to strategic planning
- Remind people it can be done on a number of different levels – from organizational to project level

Making your own plan: (1.5 - 3 hours)

Step 1: Visioning (minimum 20 minutes)

- Have each person spend some personal time and write down their goals for the project or organization: what would each person like to accomplish or see happen? What would be the *outcome* of all of these actions?
- Share with group and take note of commonalities
- Decide on a catchy vision that describes how your project or organization will leave the world a better place (see examples below)

Step 2: Mission (minimum 10 minutes)

- Together, create a captivating sentence or two that describes how your organization or project will achieve your vision. Be sure to include the audience you're working with, and the actions you'll take (see examples below).
- It often helps to come up with ideas in smaller groups, and bring them back to the whole group to pick out the pieces you like best from all the ideas

Step 3: SWOT Analysis (minimum 15 minutes)

- Brainstorm with the group, focussing on the strengths of the group and how you can leverage them up
- Recognize that there is a fair bit of uncertainty in the opportunities and threats – and this is okay! Ensure there is flexibility in your project or organization to work with them as they arise
- Come up with 2-3 ways you can overcome your weaknesses, and even turn them into strengths

Step 4: Goal-setting (minimum 15 minutes)

- Come back to the individual lists of goals people want to accomplish, and begin prioritizing them based on how they support your vision and mission, and take advantage of your strengths
- Be careful not to confuse goals with objectives:
 - On the organizational level, goals may be broad, for example to increase your membership by 50%
 - On the project level, goals may be slightly more concise, such as to hold a film festival that attracts 200 people

Step 5: Objectives (minimum 20 minutes)

- Break each goal into concise steps that can be assigned a person and a deadline
- It's helpful to put these onto a visual timeline, and work backwards to make sure your timeline is realistic (see example below)

Step 6: Capacity Assessment: (minimum 10 minutes)

- Are people overwhelmed by the amount of work? Think through and make sure you have enough time, money, people and resources to do the job well. If not, think through how you can get more resources!

Step 7: Evaluation (minimum 10 minutes)

- How will you know if you've been successful? Brainstorm a list of things that will help define your success, both at the end and throughout your project. For instance, will it be the number of people who attend an event? Will it be the number of volunteers who are showing up to meetings through the planning process?
- Be sure you come back every couple weeks and assess your progress against your strategic plan. A strategic plan is always meant to be flexible; if you aren't on track don't despair! You

may have to adjust your goals to be more realistic or look for other ways of achieving them, but the strategic plan can help you be proactive about this.

A note to leave on:

- More time is always better for a strategic plan – but you may need to break it down into 2 sessions to keep people’s sanity in tact. Getting as far as a SWOT analysis may be enough for one day, and then you can start fresh in looking at your goals and objectives. EVERYONE in your group should be involved, and make sure you have ample time and a comfortable space to do it in. A dinner potluck is always a good way to go!

Differences and Definitions:

VISION – the utopian outcome - focus on the outcome, not the action that will bring you there

CCN Vision: The Campus Climate Network envisions institutions of higher learning working together to help BC solve its climate crisis.

OR

SYC Vision: The Sierra Youth Coalition envisions happy people and a healthy planet, where all forms of diversity is respected and the human family works to enhance the well being of each other and the ecosystem we are a part of

MISSION: focuses on the ACTIONS that your group will take to attain your vision.

CCN mission: to unite passionate students across the province and to educate, inspire, engage, and support youth to take climate action on their campuses.

OR

SYC mission: SYC works to educate, engage and empower youth to be active in their communities in the pursuit of social justice and ecological balance, with thinking that considers the future over 7 generations.

SWOT Analysis:

S – Internal strengths - the passion and dedication of people working on the project)

W – Internal - the high turn-over rate of students; the breadth of our project

O – External opportunities – the climate neutral mandate laid out by government

T – External threats – the budget cuts to post-secondary schools

** turn weaknesses and threats into strengths and opportunities!!

GOALS: are outcome based and support your mission and vision.

For example: Hold a movie night that attracts 200 people

OBJECTIVES: are the strategies to achieve the goals – there may be many objectives for each goal.

Objectives should be **SMART** = Specific, Measurable, Attainable, Relevant, Time-bound. Every objective should have a bottom-liner and a timeline!

For example: Book the theatre; Clown McHappy; by October 22

Design a poster; Jiffy Pop; by October 24

See Appendices Below for Handouts

Appendix 1: Steps to a strategic plan

Step-by-Step Guide for Developing a Strategic Plan		
Begin steps here ↓		Specific Actions
1. Vision and Mission Ensuring the group shares a common vision of what kind of world it wants to work toward and how it will do so, with the project.	→	Discussion on social, economic and ecological values. Discussion of individual needs and campus/community/global needs. Agreement on which values are shared, and articulation of a statement that embodies these values in the context of the project/group. Agreement on means to pursue this vision.
↓		
2. SWOT analysis A review of your groups/projects Strengths, Weaknesses, Opportunities and Threats	→	<ul style="list-style-type: none"> • Write down a list for each SWOT element. • Consider the lists in the context of what to be aware of when planning out goals for the plan.
↓		
3. Setting a plan timeline and goals Select the goals you want to pursue along the chosen timeline.	→	<ul style="list-style-type: none"> • Decide if you are doing a one, two or three year plan (or six month, or five year...). • Brainstorm goals (<i>i.e.</i> accomplishments). • Prioritise which goals will go into the plan.
↓		
4. Capacity and Needs Assessment Determine what gaps exists in your group's capacity, both human and material resources.	→	<ul style="list-style-type: none"> • Assess logistical and resource needs. • Assess volunteer/staff competency and training needs. • Plan for needed supplies and resources.
↓		
5. Determine objectives and bottom liners Determine which objectives you need to plan to reach each goal and assign a bottom liner.	→	<ul style="list-style-type: none"> • Plan out the means you will pursue (objectives) for accomplishing your goals. • Select one person to 'bottom line' following through on each of the objectives. • Put deadlines on each objective.
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6. Evaluation Have an evaluation mechanism to ensure the plan is being implemented and can be changed if need be.	→	<ul style="list-style-type: none"> • Develop evaluation strategies, techniques, and criteria. • Implement evaluation and integrate results into future planning. • Assign a Strategic Plan 'whip' to bottom line these evaluations.
FINISH/START AGAIN		

Resource from: *Strategic Planning Guide, Sierra Youth Coalition's Sustainable Campuses Project*

Appendix 2: Strategic Planning Outline

Organization:				
VISION (Dream, dream, dream.)				
MISSION (What, who, how)				
S.W.O.T.	Strengths	Weaknesses	Opportunities	Threats
S: Aspects of the group that will bring success!!				
W: Characteristics that can be strengthened				
O: Events, relationships, etc. we can take advantage of				
T: Possible roadblocks				
	GOALS (An end state, short/long term)	OBJECTIVES (Means of achieving goals)	WHO	WHEN
CAPACITY/NEEDS ASSESSMENT (Time/resources/ppl reasonable? Engage others/develop resources?)				

Appendix 3: Sample Timeline

	Week 1	Week 2	Week 3	Week 4	Week 5
Goal 1 (ex. Film screening)	- Design posters (CM) - Book theatre (JP)	- Approval by committee - Print Posters - Arrange snacks	- Poster campus - send email out	- Email reminder	Screening!
Goal 2					
Goal 3					
Goal 4					