

# NORTHSPAN

COMMUNITY BUSINESS ORGANIZATIONAL DEVELOPMENT

## PREFERRED STRATEGIC PLANNING METHOD



Northspan's preferred strategic planning method uses proven facilitation methods to guide clients toward clear strategic directions and feasible, achievable action steps. While our specific scope may vary from client to client, this method drives our work.

## APPROACH

Northspan designs an engagement scope with the group and presents a proposal. If accepted, Northspan's preferred strategic planning method includes six phases:

- I. Preparation & Design
- II. Practical Vision
- III. Underlying Contradictions
- IV. Strategic Direction
  - a. Redefining vision, mission & core values | Potential added workshop
- V. Focused Implementation
- VI. Quarterly Evaluation & Planning

## WORKSHOPS

Once preparation & design is completed, the six phases may occur over the next year in 10 workshops:

1. Context Presentation & Practical Vision
2. Underlying Contradictions & Strategic Directions
3. Vision, Mission & Core Values
4. Focused Implementation Part 1, 2, & 3
5. Present Strategic Plan
6. Focused Implementation Part 4
7. Quarter 2 Planning
8. Quarter 3 Planning
9. Quarter 4 Planning
10. Annual & Quarter 1 Planning



## Phase I: PREPARATION & DESIGN

Northspan works with the group to design the engagement, clarify who needs to be involved, and examine the group's environment, which provides focus for the workshops.

Preparation and design of our strategic planning method could incorporate all of the following components:

- Clarify strategic planning goals
- Identify those to be engaged in the workshops
- Organize & schedule workshops and check-in meetings when necessary
- Obtain background information & related materials

### DETERMINE LEVEL OF COMMUNITY INVOLVEMENT

(community may be employees, customers, recipients, clients, and/or public):

- a. Community Informed
  - i. Develop and survey/canvass community members
- b. Community Involved
  - i. Develop & host focus groups (e.g. up to 3, 2-hour focus groups)
  - ii. Develop & conduct key stakeholder focused conversations (e.g. up to 4, 2-hour focused conversations)
- c. Community Engaged
  - i. Involve community members directly in planning and decision-making groups

### DETERMINE & CONDUCT ENVIRONMENTAL ASSESSMENTS, timing in process to be determined:

- a. Review & assess group's current Vision, Mission, and/or Core Values for clarity and relevance
- b. Wall of Wonder / historical scan
- c. Economic Trends Analysis
- d. Strengths, Weaknesses, Opportunities, Threats (SWOT)
- e. Current Reality Assessment (Strengths, Weaknesses, Benefits, Dangers)
- f. Assess progress on previous Strategic Plan

### DEVELOP NARRATIVE & CONTEXT PRESENTATION

Use past reports, surveys, and relevant community-based demographic and economic data to develop narrative around the community and create an overview presentation to provide context in first workshop:

- a. Internal analysis: Document community resources and assets through community conversations & analysis, and supplement with relevant data
- b. External analysis: Use data tools and research to determine trends and best practices relevant to the group, including case study comparisons when relevant

## Phase II: PRACTICAL VISION

The group creates practical images of their desired future.

*Workshop Time: 90 - 120 minutes*

What do you want to see in place in three to five years as a result of our actions?

- Reveals the latent vision within the group; identify the group's hopes and dreams.
- Creates group ownership of a common vision of the future.

## Phase III: UNDERLYING CONTRADICTIONS

The group identifies and analyzes obstacles and root causes that prevent realization of its vision.

*Workshop Time: 90 - 150 minutes*

What is blocking us from moving toward our vision?

- Identifies obstacles to the vision.
- Ensures the group feels they've identified underlying issues.

## Phase IV: STRATEGIC DIRECTION

The group creates strategies that will deal with the contradictions and move a group toward its vision.

*Workshop Time: 100 - 130 minutes*

What innovative, substantial actions will deal with the underlying contradictions and move us toward our vision?

- Enables the group to create clearly focused, yet innovative and empowering strategies that set the course for the group.
- Generates excitement about collaboration within the group and new commitment to practical possibilities.

## Phase IVa: REDEFINING VISION, MISSION & CORE VALUES

Potentially recommended added workshop

*Workshop Time: 120 - 180 minutes*

Mission: What do we do? It's factual.

Vision: Where are we going? It's aspirational.

Core Values: Define your culture. They exist today whether you have captured them or not.

When they are clear, they will attract like-minded people to your organization. When they are applied to your existing organization, they will weed people out that don't fit. Once captured, they must be used for hiring, firing, review, rewards and recognition. This is how you keep them alive.

## Phase V: FOCUSED IMPLEMENTATION

The group decides the substantial actions required to carry out its new directions with measure and implementation plans. Focused Implementation has four major parts.

- Discerns the strategic actions that will begin to build momentum behind each strategic direction.
- Instills ownership, commitment, and accountability for action.

### (1) Accomplishments

What will be our specific, measurable accomplishments?

*Workshop Time: Varies depending on the number of Strategic Directions; approximately 120 - 180 minutes*

### (2) Timeline & assignments

What is our timeline for completion of accomplishments?

*Workshop Time: 50 minutes*

### (3) Priorities

What are our priority actions for the first quarter?

*Workshop Time: 15 minutes*

## Once all planning sessions are completed, we:

- Draft a feasible strategic plan
- Electronically communicate the draft strategic plan with the group to acquire feedback
- Edit and present a final strategic plan including a process summary to the group for approval
- Complete a 90-day check-in or engage in quarterly evaluation and planning

### (4) 90-day implementation steps

What are the implementation steps for the first-quarter accomplishments?

*Workshop Time: Varies depending on the number of first-quarter or key accomplishments; approximately 120-180 minutes*





## Phase VI: QUARTERLY and ANNUAL EVALUATION & PLANNING

*Workshop Time: 180 minutes per workshop*

### Quarters 2, 3 & 4 Planning

1. Review vision, obstacles & strategic directions
2. Evaluation of 90-day action plan: Brainstorm of accomplishments, what didn't get done, blocks, learnings, and implications
3. Plan for next 90 days: Measurable accomplishments on quarterly timeline, 90-day action for each accomplishment

*Workshop Time: ½ Day, 4 hours*

### Annual & Quarter 1 Planning

1. Review vision, obstacles & strategic directions
2. Evaluation of 90-day action plan: Brainstorm of accomplishments, what didn't get done, blocks, learnings, and implications
3. Plan for next 90 days: Measurable accomplishments on quarterly timeline, 90-day action for each accomplishment
4. (Annually only) Development of measurable accomplishments for next 12 months on quarterly calendar



## METHODS DEPLOYED THROUGHOUT STRATEGIC PLANNING

**Focused Conversations** create a setting for meaningful communication.

- Provide a structure for clear dialogue and reflection
- Probe beneath the surface to the depth of a topic
- Encourage a diversity of perspectives
- Create shared awareness

**Consensus Workshops** lead to consensus-based group decisions that respect diverse perspectives, create joint resolve, and inspire individual and group action.

- Engage all group members
- Organize the group's ideas and decisions
- Reveal the consensus in large groups
- Build effective team partnerships
- Create shared agreement

**Action Planning** (when appropriate) is an approach to short-term planning for events or projects that already have group agreement.

- Visualizes the completed task
- Analyzes the current situation
- Focuses the group's commitment
- Sets up clear forms of accountability
- Develops a coordinated action timeline
- Creates commitment to action



Method Source: *The Institute of Cultural Affairs in the U.S.A. Technology of Participation (ToP) Methods*