

# 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 seven phases:

1. Preparation & Design
2. Practical Vision
3. Underlying Contradictions
4. Strategic Directions
5. Vision, Mission & Core Values
6. Focused Implementation
7. Quarterly and Annual Evaluation & Planning Workshops

## 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



## 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:

1. Internal & External Analysis
2. Assess Progress on Previous Strategic Plan
3. Demographic Analysis
4. Economic Trend Analysis
5. Economic Impact Analysis
6. Feasibility Study
7. Community-Informed Survey
8. Post-Strategic Directions Mini-Survey
9. Strategy Committee, Board, & Staff Survey
10. Strengths, Weaknesses, Opportunities, Threats (SWOT)
11. Current Reality Assessment (Strengths, Weaknesses, Benefits, Dangers)
12. Stakeholder Interviews (organization structure, change management, succession, etc).
13. Focus Group Listening Sessions
14. Wall of Wonder Historical Scan
15. Wave Metaphor

## **(1) Internal & External Analysis**

Document organizational & community resources and assets through organizational review, community analysis, and supplement with relevant data.

- Obtain background information & related materials
- Existing strategic, planning, or related documents
- Investigate, assess, and provide recommendations for potential strategic partnerships
- Thorough evaluation and recommendations on possible restructuring of operations and affiliate relationships

Use data tools and research to determine trends and best practices relevant to the group, including case study comparisons when relevant. Data will seek to provide proper context on the effects of the coronavirus pandemic.

- US Census and American Community Survey
- Minnesota and Wisconsin economic and labor data sources
- Bureau of Economic Analysis
- Bureau of Labor Statistics
- Other relevant federal, state, and local sources

## **(2) Assess Progress on Previous Strategic Plan**

Northspan will work with the group to assess its previous strategic plan. This may include a discussion with identified stakeholders on the progress made on the plan or a set of questions in a survey that invites respondents to assess progress and the ongoing relevance of plan elements.

## **(3) Demographic Analysis**

The demographic analysis will assess changes in the region the organization serves, including shifts in population, age, racial and ethnic categories, and other relevant trends that may affect use of its services. The findings aim to provide context on the social and economic environment in which it operates and how the data has changed over time.

## **(4) Economic Trend Analysis**

The economic trends analysis will assess the state of the economy in the region. It will identify leading industries, areas of growth and stagnation, and build a story on the trajectory of the region. Its findings aim to provide context on the social and economic environment in which the organization operates and how the data has changed over time.

## **(5) Economic Impact Analysis**

The economic impact analysis quantifies the effects of the organization on the local economy. Based on a set of assumptions generated in collaboration with the client, it conducts an economic impact analysis using IMPLAN data. It incorporates direct, indirect, and induced economic impact data into the written report, including analysis of the results.

## (6) Feasibility Study

A feasibility study develops projections on the financial feasibility for the organization and what it's trying to accomplish. Northspan and the client will engage in discussions on the assumptions that underlie the proposed project and use these assumptions to generate financial projections, thereby demonstrating the potential viability of the project and identifying funding sources and gaps that may exist.

## (7) Community-Informed Survey

Utilizing Survey Monkey, Northspan creates and conducts a community-informed survey. (Community may be current and past members, partners, community stakeholders, volunteers, local leadership, city/state political leadership, local diversity, equity & inclusion leaders, and the public.) We distribute the survey to identified audiences and coordinate publicity efforts with staff.

The community-informed survey seeks to gather ideas regarding what stakeholders would like the organization to focus on in its strategies. These insights will aid the organization's understanding of how the community expects the organization to show up, listen, and move in the community to make a difference going forward. It will also provide ideas on opportunities the organization can propel or create to improve outcomes.

## (8) Post Strategic Directions Mini-Survey

This survey includes vision-related and current reality assessment (strengths, weaknesses, benefits, dangers) questions. It prepares the strategy committee for the upcoming workshops and aids in reviewing & assessing the organization's current mission for clarity and relevance and developing the vision and core values.

## (9) Strategy Committee, Board, & Staff Survey

Targeted to all staff, board, and strategy committee members. This group will also usually complete the Community-Informed Survey.

- Assess progress on existing initiatives, Vision, Mission, and Core Values
- Conduct a Strengths, Weaknesses, Opportunities, Threats (SWOT) assessment
- Gain insight building toward the group's Practical Vision, Underlying Contradictions, and Strategic Directions





## (10) Strengths, Weaknesses, Opportunities, Threats (SWOT)

This assessment asks participants to help define the overall landscape in which the organization operates. It asks participants to identify trends in four areas of interest:

- I. Strengths (Internal factors that give the organization an advantage over others)
- II. Weaknesses (Internal factors that place the organization at a disadvantage relative to others)
- III. Opportunities (External factors that the organization could capitalize on to its advantage)
- IV. Threats (External factors that could create challenges for the organization)

## (11) Current Reality Assessment (Strengths, Weaknesses, Benefits, Dangers)

This assessment is grounded in the group's ability to work toward its Practical Vision and the potential success of accomplishing its Strategic Directions. It asks participants to identify trends in four areas of interest:

- I. Strengths (What are the strengths this group has toward creating the Practical Vision? What are our strengths as a team?)
- II. Weakness (What are the weaknesses this group has toward accomplishing the Strategic Directions? What are our weaknesses as a team?)
- III. Benefits (What benefits will our success bring?)
- IV. Dangers (What obstacles or dangers do we anticipate confronting when we are highly successful?)

## (12) Stakeholder Interviews

Northspan conducts virtual one-on-one interviews with stakeholders, board members, and/or current staff for input on the planning process. This may include questions regarding organization structural change, succession planning, etc.



### (13) Focus Group Listening Sessions

Northspan develops and conducts focus group listening sessions with stakeholders identified in coordination with staff, including current and former board members and/or stakeholders, depending on the organization's planning goals.

The data and ideas from these conversations will be summarized in a document and synthesized to inform the planning workshops.

### (14) Wall of Wonder Historical Scan

This group reflection tool enables a group to produce a shared picture of the organization's history and discuss its significance in relation to the future. Through the process, participants identify events that have occurred and place them on a timeline. The process helps them reflect on their history (where they have come from) and current strategic environment, what they have learned, each other's perspectives, and how they are positioned to move into the future (where they want to go).

### (15) Wave Metaphor

This approach provides a brief, interactive way to focus a group on the realities of the external environment surrounding the organization prior to planning activities. It asks the question, "What is going on around us that we need to pay attention to as we move forward?" It creates an inventory of trends, paradigms, and approaches.

## WORKSHOP 1: CONTEXT PRESENTATION & PRACTICAL VISION

Workshop Time: 4 hours

### Develop Narrative & Context Presentation

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

### Practical Vision | The group creates practical images of their desired future.

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

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

## WORKSHOP 2: UNDERLYING CONTRADICTIONS & STRATEGIC DIRECTIONS

Workshop Workshop Time: 4 hours

### Underlying Contradictions | The group identifies and analyzes obstacles and root causes that prevent realization of its vision.

What is blocking us from moving toward our vision?

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

**Strategic Directions |** The group creates strategies that will deal with the contradictions and move the group toward its vision.

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.

### **WORKSHOP 3: REFINING VISION, MISSION & STATEMENT OF CORE VALUES**

**Workshop Time:** 3 hours

**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.

### **WORKSHOP 4: FOCUSED IMPLEMENTATION Parts 1 – 3**

**Workshop Time:** 4 hours

The group decides the substantial actions required to carry out its new directions with measure and implementation plans.

- 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?*

#### 2. Timeline & assignments

- *What is our timeline for completion of accomplishments?*
- *What are the identifiable costs for actions on the timeline?*

#### 3. Priorities

- *What are our priority actions for the first quarter?*



## WORKSHOP 5: STRATEGY DOCUMENTATION

Once these planning sessions are completed, we:

Draft a feasible 3-Year Strategic Plan & Findings detailing Strategic Directions/Goals, Actions/Strategies and Outcomes/Objectives that includes all elements outlined above, plus:

- Create and electronically communicate the draft strategic plan with the group to acquire feedback
- Edit and present a final strategic plan by 9/26/22 including a process summary to the board for approval to begin in January 2023

## WORKSHOP 6: FOCUSED IMPLEMENTATION Part 4

Workshop Time: 4 hours

90-Day Implementation Steps for Quarter 1

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

## WORKSHOPS 7 – 10: QUARTERLY and ANNUAL EVALUATION & PLANNING

Workshop 7-10 Time: 3 hours each quarter

Quarter 2 Planning Workshop

Quarter 3 Planning Workshop

Quarter 4 Planning Workshop

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

Annual Evaluation & Quarter 1 Planning Workshop

Workshop 10 Time: 6 hours

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

## EMBEDDED METHODS

**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*