REAL TIME STRATEGIC PLANNING

Facilitated by Brenda Holden

Panel of Experts:
Tri-CAP, West Central and Three Rivers
GOALS OF
SESSION

• Overview of Real Time Strategic Planning
• Hear from three agencies
  o Tri-CAP 2013
  o West Central 2015
  o Three Rivers 2017
• Tips and Advice
• Questions and Answers
Nonprofits must continually think and act strategically to keep pace with the speed of change.

Sometimes our strategic plans get in the way of the real work where quick adaptation is necessary for surviving.

Focusing on tools and process for strategic thinking rather than the final plan helps the agency stay nimble.
1. Clarity about an organization’s long-term direction

2. New tools to guide the day-by-day responses to new information in a way that keeps a nonprofit aligned towards its organizational strategy

WHAT IS INVOLVED?

Involve and train enough people to ensure agency wide buy-in and ongoing participation

Upfront investment of time to understand
✓ Mission and organizational identity
✓ Current business model and financial analysis
✓ Market awareness including competitor and trend analysis
✓ Competitive advantage of the agency (the unique niche)
✓ Future business model

Note: Templates and worksheets for all of this are available from La Piana’s book and website.
AGENCY END PRODUCTS

Staff skill-building in identifying needs or ‘big questions’, goals and strategies

Tailored strategy screen template for agency wide use

Tailored work plan template
Typical approach:
Should we apply for this home remodeling grant? (yes or no)

Real Time ‘big question’ approach:
What is our appropriate role in addressing housing needs?
  - What are current needs?
  - Who else is working on this?
  - Should we pursue or partner or refer?
WHAT IS A STRATEGY SCREEN?

A simple tailored tool used throughout the agency on an ongoing basis that:

• Shares criteria used for making decisions
• Explicitly defines agency values
• Reduces risk of choosing the wrong strategy
• Can be used to track planning and decision-making
STRATEGIC PLAN FLOW CHART

Step 1: Identify the need, what is the need statement?

Need: ______________________________________

Does this need fit into our mission and identify statement?

Mission Statement: The Mission of Tri-CAP is to expand opportunities for the economic and social well-being of our residents and the development of our communities.

Identity Statement: We are a non-profit agency that works to expand opportunities for the economic and social well-being of our residents and the development of our communities by serving and being sustained by our Central Minnesota community. We build meaningful relationships based on dignity and respect, and we create services that are responsive to identified needs.

Will this strategy improve the agency or community?

Is there an identifiable need? What is the threat of no action?

Do we want to create strategies around this need? Yes No

Step 2: Identify potential strategies or plans

Strategy 1: ______________________________________

Strategy 2: ______________________________________

Strategy 3: ______________________________________

Step 3: Evaluate the strategies or plans

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<th>Strategy 1</th>
<th>Strategy 2</th>
<th>Strategy 3</th>
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<tr>
<td>Can we measure this strategy? How will we know if we are successful?</td>
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<td>Can we get this done – is it realistic?</td>
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<td>What are the threats/negatives to this strategy?</td>
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<td>Who else is doing this?</td>
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<td>How do we get this done?</td>
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<td>Who do we include/who is the point person?</td>
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<td>What is the next step if we choose this option</td>
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Step 4: Choose the strategy

Which strategy was selected? ______________________________________

Why? ______________________________________
Big Question:

Does this need fit into our mission and identify statement?

Mission Statement: The Mission of WCMCA is to Partner to build community and empower people to overcome poverty and achieve their full potential.

Identity Statement: We advance our mission of partnering to end poverty, and seek to improve quality of life in West Central Minnesota, by serving low income families with a wide range of programs and services through a committed, responsive board and staff, utilizing federal, state, foundation and local funding.

Will this strategy improve the agency or community?

Is there an identifiable need?
What is the threat of no action?

Do we want to create strategies around this need? 
Yes  No

Identify potential strategies or plans

Strategy 1:
Strategy 2:
Strategy 3:

Evaluate the strategies or plans

Can we measure this strategy? How will we know if we are successful?
Can we get this done – is it realistic?
What are the threats/negatives to this strategy?
Who else is doing this? Is it a duplication of services?
Do we/ could we have the capacity to support the strategy?
How do we get this done? Who do we include? Who is the point person?
Is it sustainable? (Should it be self-
### THREE RIVERS’ STRATEGY SCREEN

**Note:** Use this form for note-taking during your screening meeting. You must enter your Strategy Screen information via the link at the bottom of the page for tracking.

**Date completed:** __/__/__

<table>
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<th>Big Question</th>
<th>Goal</th>
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#### How to measure progress

#### Potential options

#### Those involved in reviewing these options

**Highlight lead contact for follow-up:**

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<th>Option 1</th>
<th>Option 2</th>
<th>Option 3</th>
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<tr>
<td>Y/N/?</td>
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- Does it support our mission? *Mission alignment required. Do not continue screening this option if you cannot answer “Yes.”*
- Does it build on our unique strengths or position?
- Does it duplicate other services?
- Does it create opportunity for collaboration?
- Is there an identifiable funding source?
- Do we have or can we get/build the capacity for this?
- Have the tradeoffs been identified?

**Which option is best?**

**Why?**

**What need does this address?**

**What’s next?**

- DO IT. Send to Management Team/Director for review before developing a work plan.
- WAIT. It’s important, but action depends on funding, completion of other goals, etc.
- FORGET IT. It’s not important now, there’s no good option, we need information, etc.
- Other

**Submit all completed Strategy Screens via the online form at:** [https://goo.gl/forms/9tqpA3m527JYwkX53](https://goo.gl/forms/9tqpA3m527JYwkX53)

**Date submitted via Google Form:** __/__/__

**Date approved / denied for work plan development:** __/__/__

**Board approval required?** Y / N

**Management team contact for follow-up:** Rev. 1/31/18
## Tri-CAP Real-Time Strategic Plan—Work Plan

**BIG QUESTION:**

**Goal/Outcome:**

<table>
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<tr>
<th>Strategies &amp; Action Steps</th>
<th>Responsible person(s)</th>
<th>Time-line (mo/yr)</th>
<th>Quarterly review: Start → Complete</th>
<th>Date achieved</th>
<th>ROMA Goal Applicable to Strategy</th>
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**Evaluation:** What will indicate success? Was a decision made at the end of the process?

*How will we measure above indicator(s)?*
TIPS

• The front end assessment work is essential. The tailored tools are effective when staff have a solid understanding of the agency’s current and future landscape.

• Agencies who have gone through the process are generous in sharing examples that may save you time.

• This is more about changing HOW you do work and less about ADDING to workloads.

• Practice and discipline are necessary for people to create new habits of using Real Time process and tools.
La Piana proposes that strategic planning be done in “real-time” as opposed to the traditional 3-year strategic planning cycle. Strategic planning is a continuous cycle.
HEARING FROM YOUR PEERS

• Lisa Drew, Tri-CAP
• Jennifer Larson, Three Rivers
• Kelli Winter, West Central
FOR MORE INFORMATION

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