

Fundamentals in Practical Leadership for New & Emerging Leaders

Session 9: Strategic Thinking Applied to Day-to-Day Work

*Most of us in the non-profit world don't often have to decide between "good and bad".
Most of our decisions are between "good and best"*

How does my 'small work' connect up to the 'big work'; the 'big picture'; the big 'why'?

Your organization's strategic plan is intended to provide direction to the organization's activities. This session explores what you can do as a leader/manager to ensure that you integrate your organization's strategic directions into your daily work, and support others to do the same. What are simple ways to ensure that you and your team are aligned to strategy? How do you nurture strategic mindsets as leader?

Agenda:

- What is a strategic plan?
- How do you develop a strategic mindset?
- How can you best support your organization's strategic plan?

OUR SERIES

Leading through the Pandemic

Your reason to lead.

What changes for you as you become a leader/manager?.

How do you influence with formal and informal leadership?

Communication Basics: Clarity, Conciseness and Civility!

Conflict Resolution: What happens when we don't all get along?

Human Resource Essentials: What I wish I knew about HR when I first became a leader/manager!

Improving Outcomes: Essential evaluation and quality improvement tools.

Financial Accountability

Strategic Thinking applied to day-to-day work and decision-making: How can I support our strategic plan?

Why End the Series
with Strategy?

What are things that must be considered as an organization develops its strategic plan?



www.PollEv.com/cfoe

(skip entering your name)





...Can't see the forest for the trees!

Why Strategic Planning?

Benefits of Strategic Planning ~

- Promotion of Strategic Thought and Action
 - Which can lead to more systematic information gathering about the organization internal and external environment
 - Heightened attention to organizational learning
 - Clarification of the organization's future direction
 - Establishment of organizational priorities
- Improved Decision Making
 - Focuses attention to the crucial issues and challenges facing the organization
- Enhanced Organizational Responsiveness and Improved Performance
- Re-engagement of an organization's people







The Context.....

Sense Making & Reflective Praxis



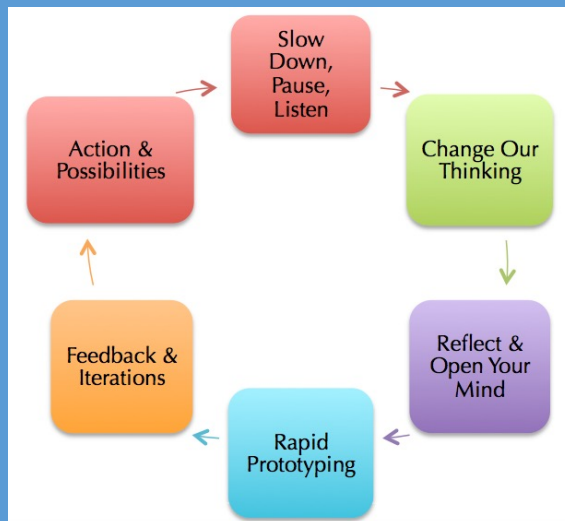


....From different sectors
we are now hearing....

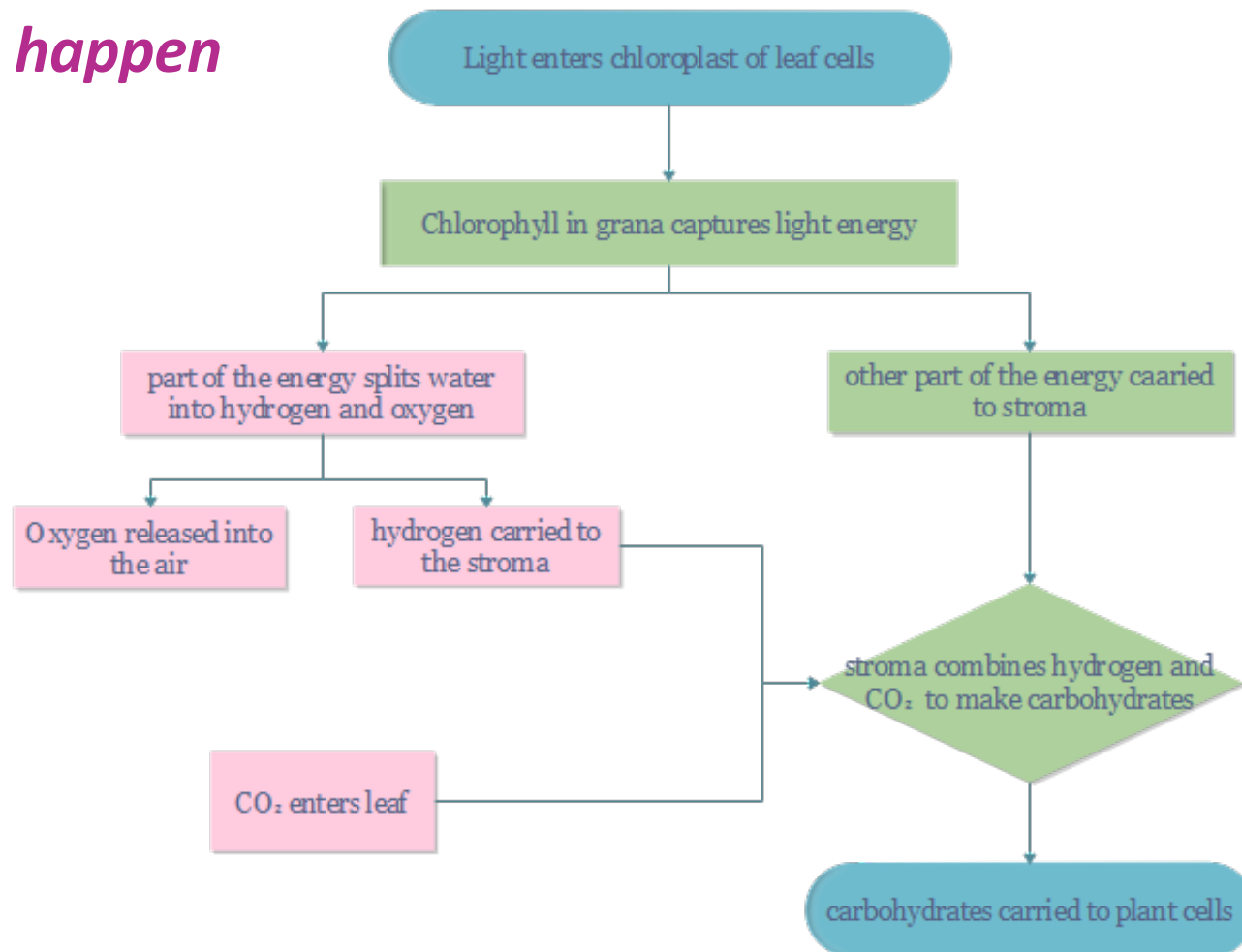
- We need time for generative dialogue

- It is precisely because sense-making is so subjective and involves so many choices that it is so powerful and ultimately so necessary for governing
- Asking: What do you notice? Trying to make sense of all kinds of information, of “messes/messiness”

(Chait et al, Governance as Leadership)



*How we want
change to happen*



How
change
really
happens....





Co-Creating Our Future

Good strategic planning processes
involves a 360 view of the organization



Discovery Process ✓

- ✓ Stakeholder feedback
- ✓ Environmental Scan
- ✓ Internal data analysis



Discovery Report ✓

- ✓ Summarizes the information from the Discovery Process.



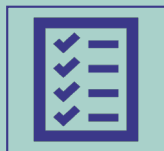
Summit ✓

- ✓ Board of Directors hosts the Summit
- ✓ Includes leadership and staff
- ✓ Review Discovery Report – what is emerging in terms of strategy?

Strategy Formulation



- ✓ Board of Directors with executive director develops high level strategic priorities



Comprehensive Actional 5 Year Strategic Plan

- ✓ Key organizational priorities
- ✓ Project Plan
- ✓ In-Kind Capacity Building workshops
- ✓ Engagement & Communication Strategy



Recommendations Regarding the Plan's Implementation

- ✓ Strategic
- ✓ Financial
- ✓ Human Resources
- ✓ Organizational Resources
- ✓ Facilities Resources

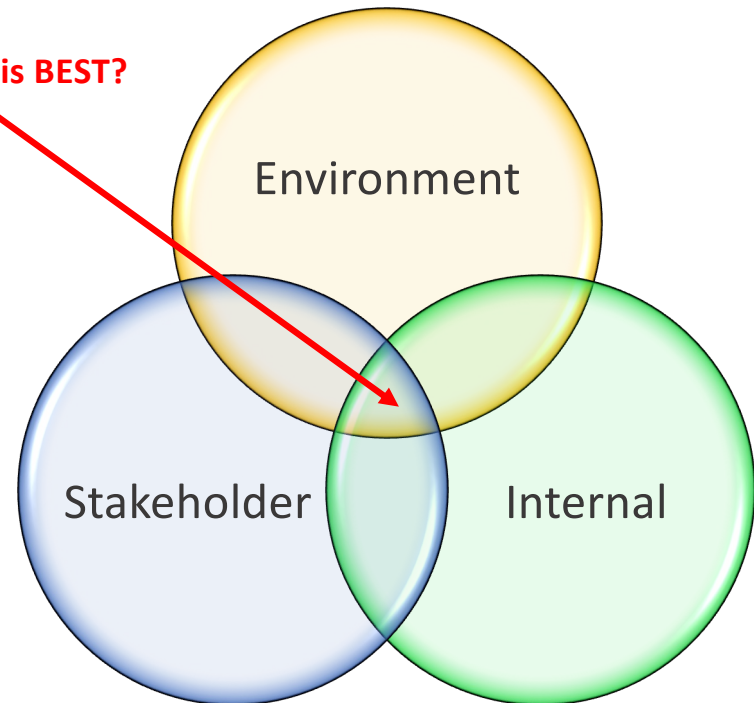
The Sweet Spot

Practice Sense Making & Reflective Practice, taking a look at the organization from a variety of angles and from here determine what is

BEST

(vs. what is just good)

Strategy – what is BEST?



Anchored by Mission, Vision & Values

Poll:



***Developing a
Strategic Mindset***

A Reflective Praxis Approach

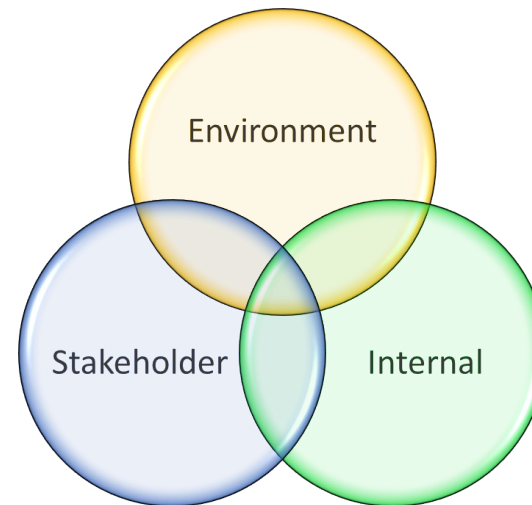
After, as part of, analysis ~ What are we learning here?


- Pause
- Sit with it
- Move to Intuition – to your gut
- Let it sink
- Discern (rational and intuition) vs. decide (just options)
- Explore
- Understand
- Move to generative dialogue
- Integrate



How to think bigger...

- Expand your thinking beyond your team, your work
- Move from defending/protecting to seeing the goal of the whole organization/community
- Prioritize – Mission, your organization, your team, your work
- Think in the lenses of
 - Environment
 - Stakeholders
 - Internal





Planting and Nurturing
Trees that contribute
to the Forest
Management Plan

How?

- Document and Communicate how the work of your team aligns with the Strategic Plan
 - Ensure they understand why the destination is important
 - show how their work supports moving towards the destination
-





How?

- Make the Strategic Plan a regular part of the conversation (use the language)
- Frame Projects and Programs within the context of Strategic Objectives
- Explicitly align agendas with Strategic Objectives

Strategic Plan 2020

Our Vision
 Mentally healthy people in a healthy society.

Our Mission
 To improve the well-being of our community through high-quality mental health and addiction services.

Our Values
 Respect. Excellence. Accountability. Collaboration. Hope.

ACCESS

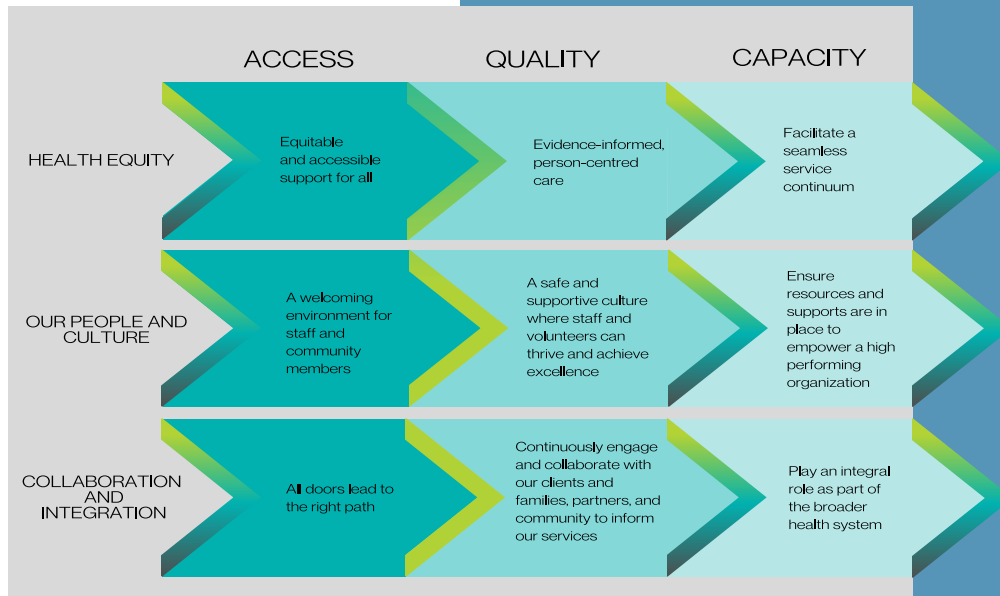
Community members receive the help they need when and where they need it.

QUALITY

We provide increasingly high-quality, person-centred, and safe service.

CAPACITY

We address the growing needs of our community through dedicated staff, innovation, and partnerships.



Agenda

Strategic Theme: Access & Capacity (Collaboration & Integration)

- Introduce New Partnership for better flow of referrals between organizations

Strategic Theme: Quality (Health Equity)

- Review evaluation of new program

Strategic Theme: ?

- Debrief critical incident

Strategic Theme: ?

- Round Table

Supporting your team in strategic thinking..

- SOAR

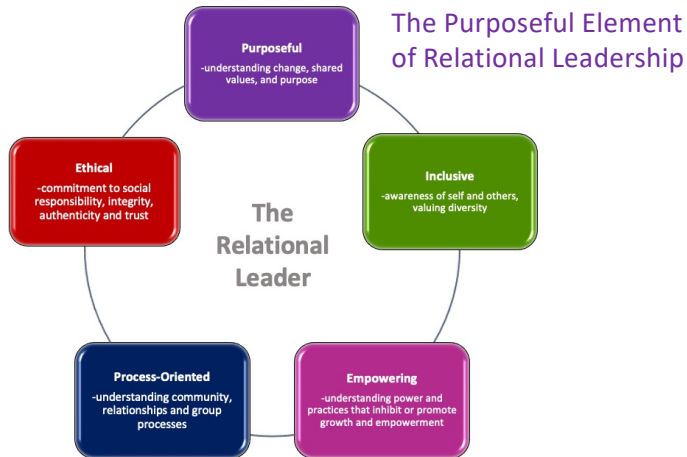


- SWOT



Photo by Shane Rounce on Upsplash

Remember tools in your tool kit (from last sessions) – apply your strategic mindset!



Your “Why” Reflection Exercise

Team's WHY Core Purpose – ALWAYS aligned to Vision & Mission of the Organization	Reflection on the Year 2020 Year of Gifts/Strengths/Skills we bring into 2020 What needs do we have? Hope for 2020
Yearly Goals Aligned to your organizations mission and strategic plan, focused on your team's mandate	Ongoing Reflection Continuous Improvement What went well last week? . What didn't go so well last week? . What are the priorities for this week? . What are some ways we can continue to focus on my goals & tackle this week's priorities? .

As you are looking at evaluation – your strategic plan can guide what types of things you should be looking to evaluate.



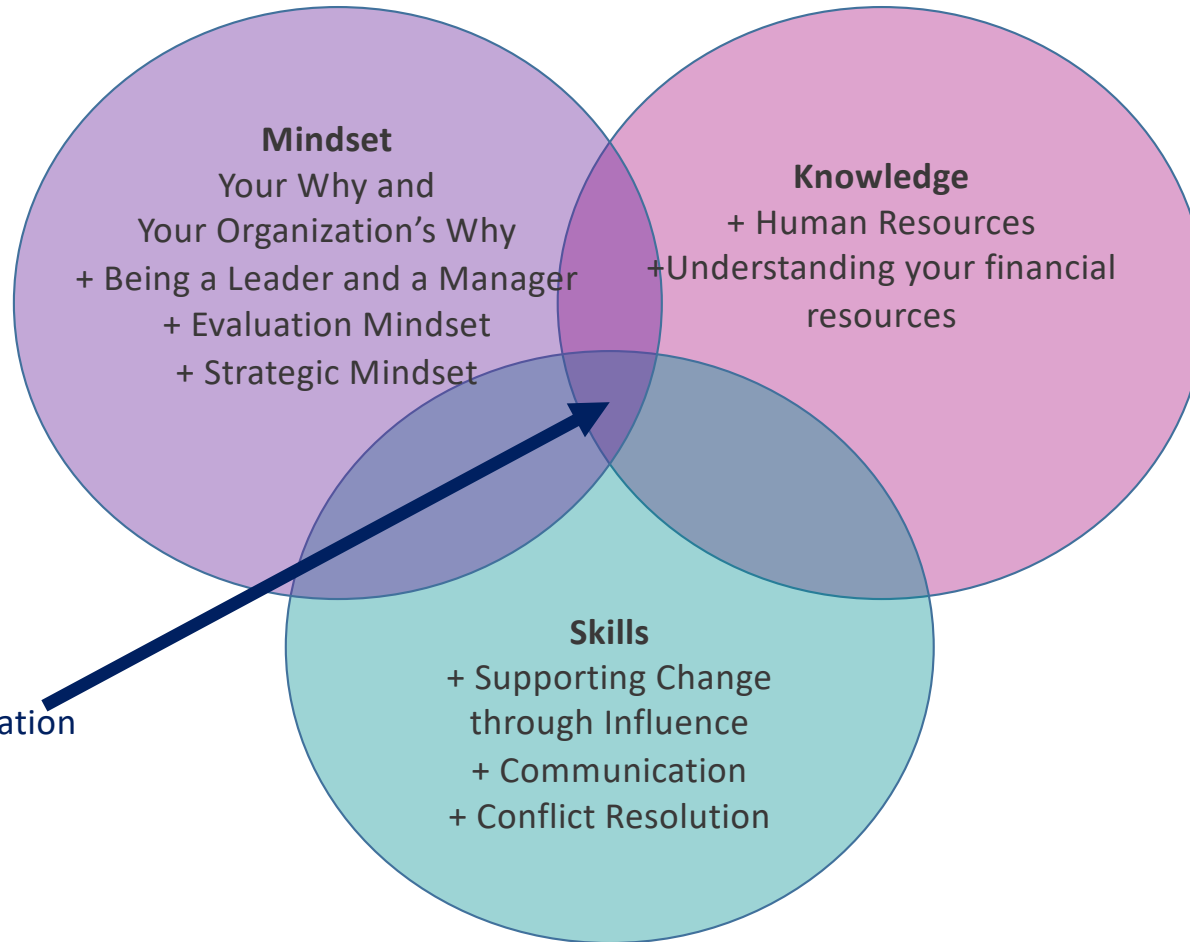
Think about Strategy related to Conflict – how does it contribute to challenges, or solve challenges arising from the SCARF model?

- **Status**
- **Certainty**
- **Autonomy**
- **Relatedness**
- **Fairness**



Repeat the message of your strategic plan often – include it in your communications planning around all you do.

The Webinar Series – Bringing it Together



Growing, Learning,
Achieving Success...

- For You
- For Your Team
- For Your Organization

Ultimately for the
People you Serve!



Reflection Questions

1. Analyze the way that the strategic plan was developed in your organization with what you have learned about strategic plans? What did you do well as an organization? What can you do differently next time?
2. What are 2-3 things that you can do to:
 - a. Develop a strategic mindset?
 - b. Align your work and the work of your team with your organization's strategic plan?

We'd love to know what this was like for you...



Maria Sánchez-Keane
maria@cfoe.ca
519.636.3887

Kathleen Schreurs
kathleen@cfoe.ca
519.933.9936

Keri Selkirk
keri@cfoe.ca
519.282.9182

Gerda Zonruiter
gerda@cfoe.ca
519.932-0535

Thank you!

One last time!!
How are you leaving today?

 CENTRE FOR ORGANIZATIONAL
EFFECTIVENESS.