

Strategic Planning: Why, What, How

Presented by Megan Foster
of Mosaic Engagement



Strategic Planning: Why, What, How

Welcome & Introductions
Components of a Strategic Plan
Steps of Developing a Strategic Plan
A Solid Start
Tools & Materials
Supporting Your Strategic Planning

Welcome & Introductions

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Components of a Strategic Plan

Steps of Developing a Strategic Plan

A Solid Start

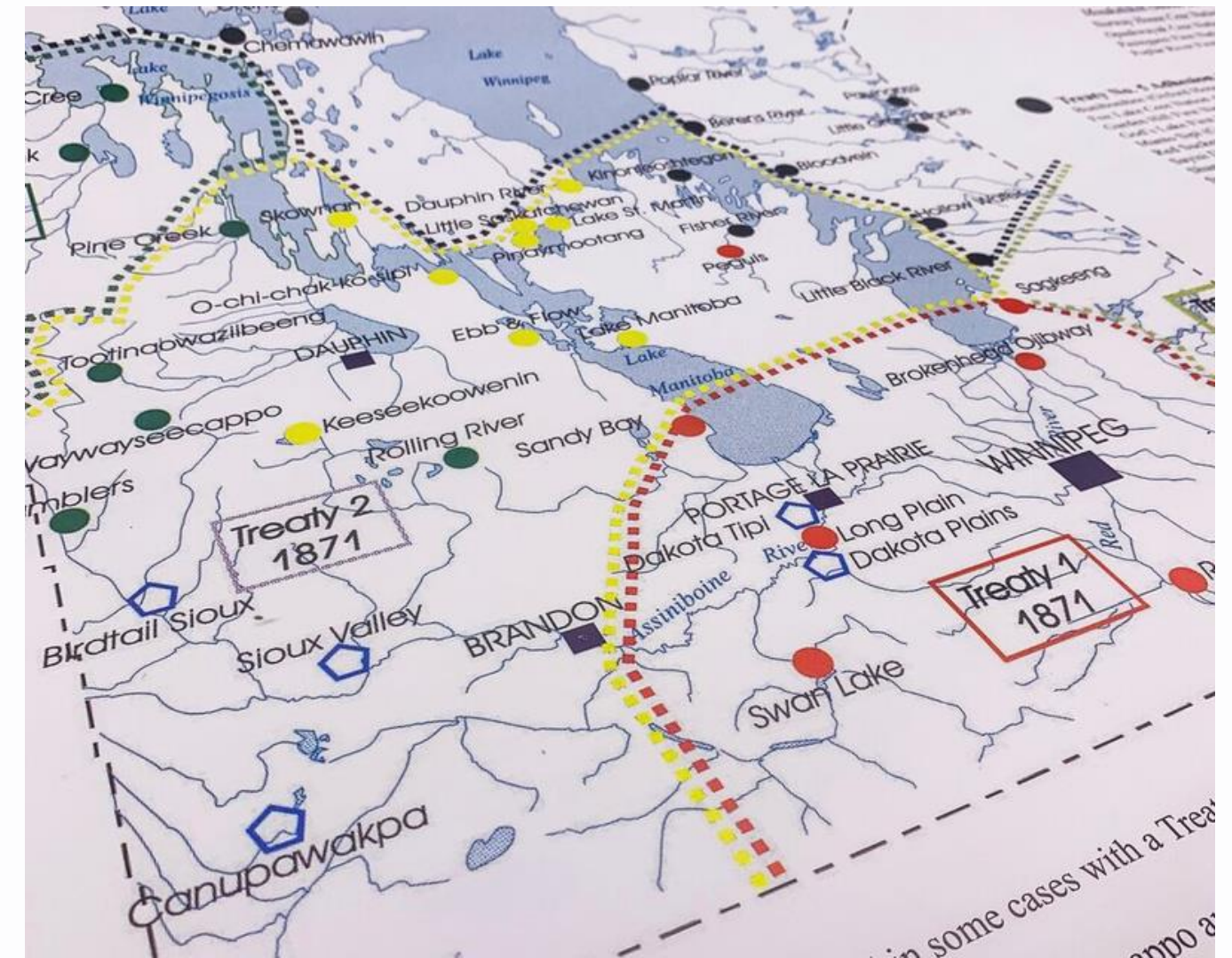
Tools & Materials

Supporting Your Strategic Planning



Commitment to Reconciliation, Equity & Inclusion

I am a white, cisgender female and use pronouns she and her. I am grateful to my family who raised me and persevered through hardships to allow me the privileges I have now. I acknowledge those who came before my family on [Treaty 2 Territory](#), the traditional homelands of the [Očhéthi Šakówiŋ](#), the [Anishinabewaki](#), and the [Michif Piyii \(Métis\)](#) People. I commit to raising my children to know about, respect, and honour those that came before them, too.



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Welcome & Introductions

Megan Foster, MA (she/her)

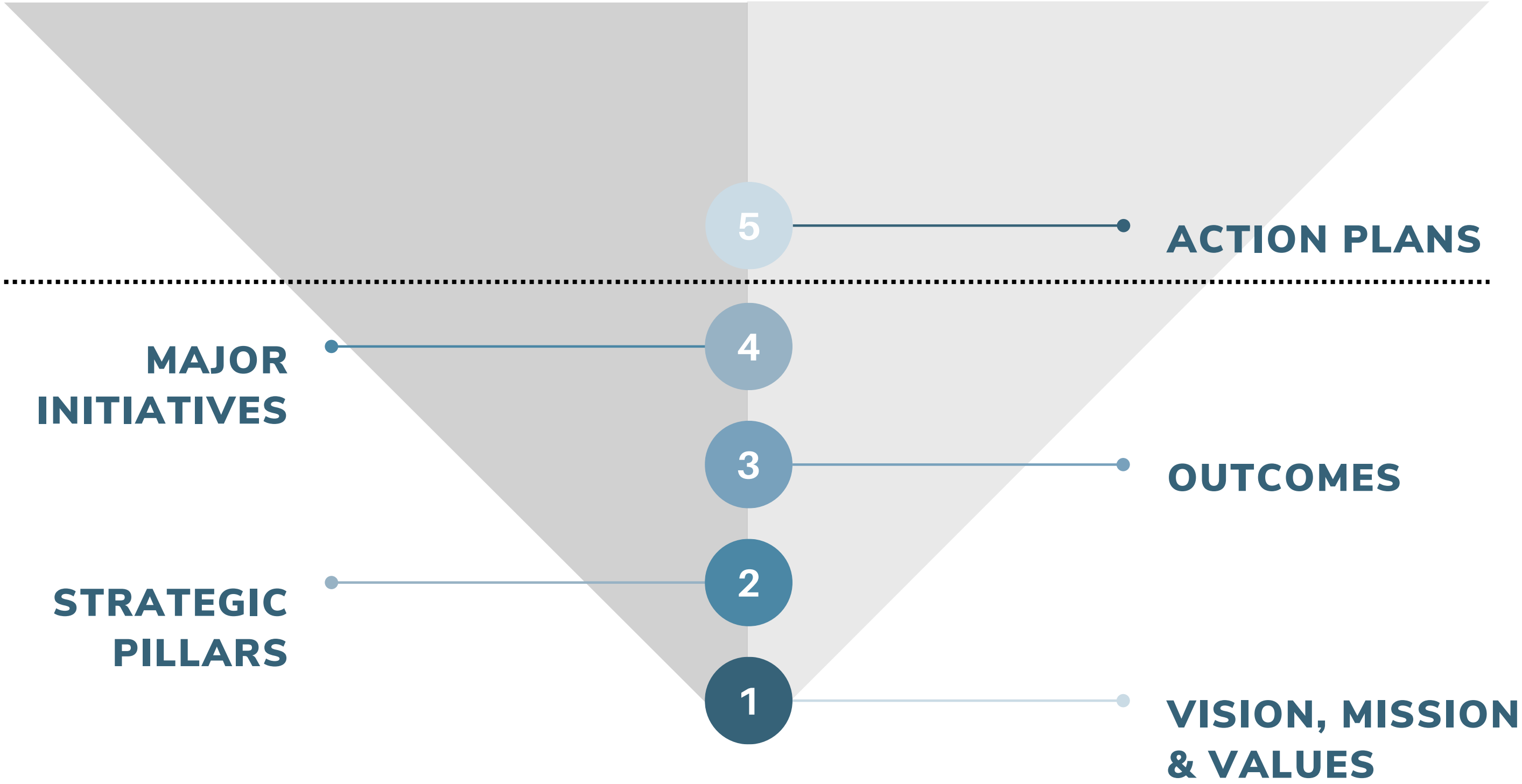
Founder of Mosaic Engagement

Passionate about helping leaders inspire and energize team members. On a mission to motivate organizations to harness the expertise and creative power within their own team.

mosaicengagement.ca



COMPONENTS OF A STRATEGIC PLAN



1

VISION, MISSION & VALUES

Vision What do we aspire to be?

Mission What do we do?
For whom?
What makes us unique?

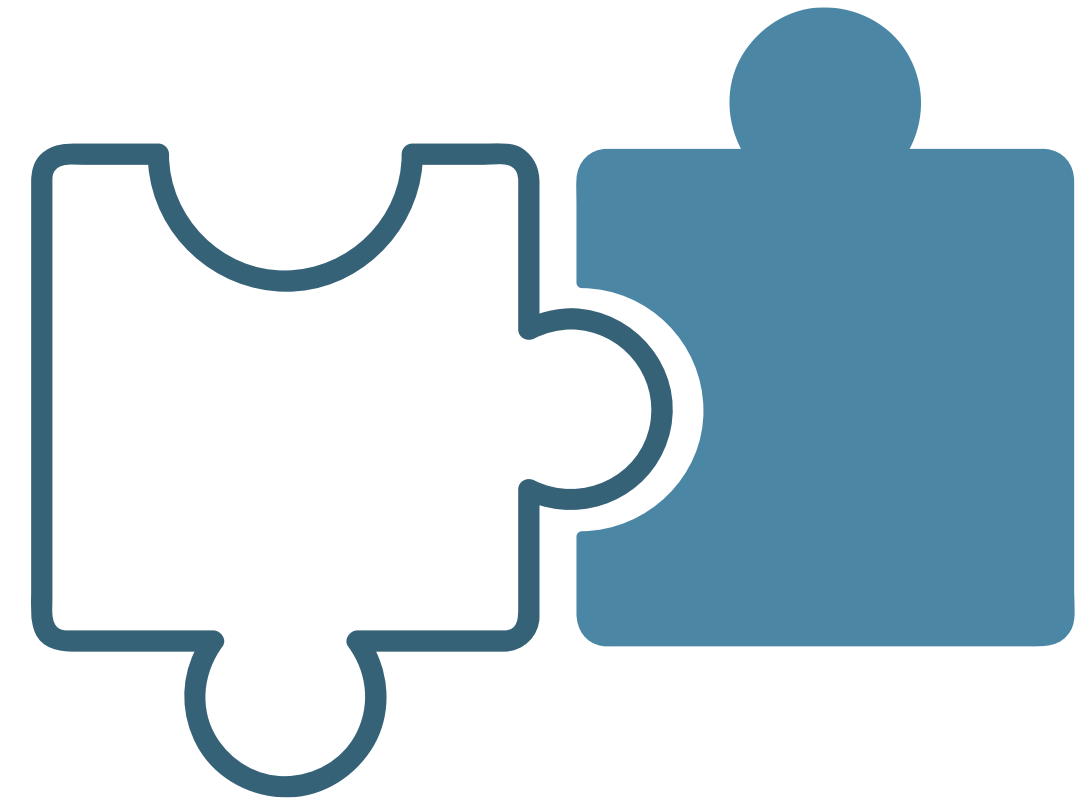
Values What are our core values/beliefs?



2

STRATEGIC PILLARS

What are the core areas of focus for our organization?



3

OUTCOMES

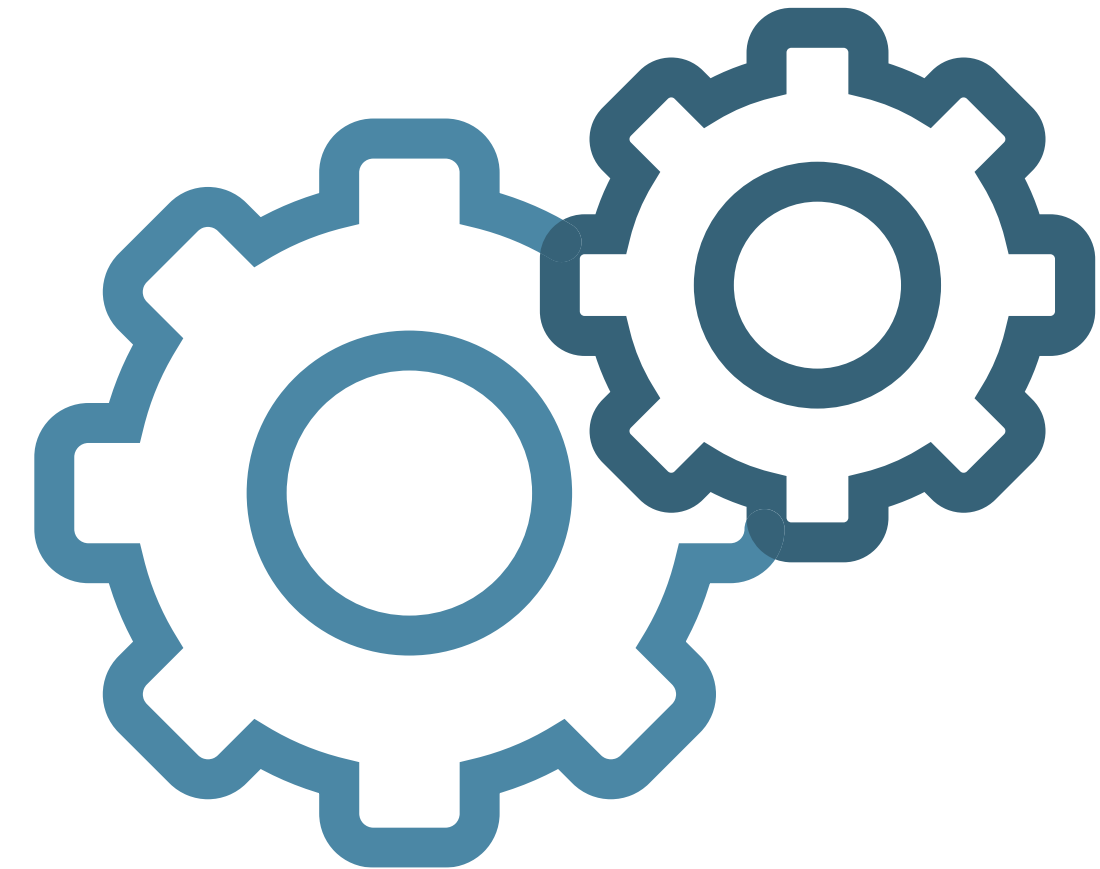
What 2-3 things do we need to accomplish in each focus area/pillar?



4

MAJOR INITIATIVES

What are 4-5 big initiatives that we need to complete to deliver on those success measures?



5

ACTION PLANS

Internal Operational Plans that are staff-owned and completed after the strategic plan.





LET'S
ENGAGE

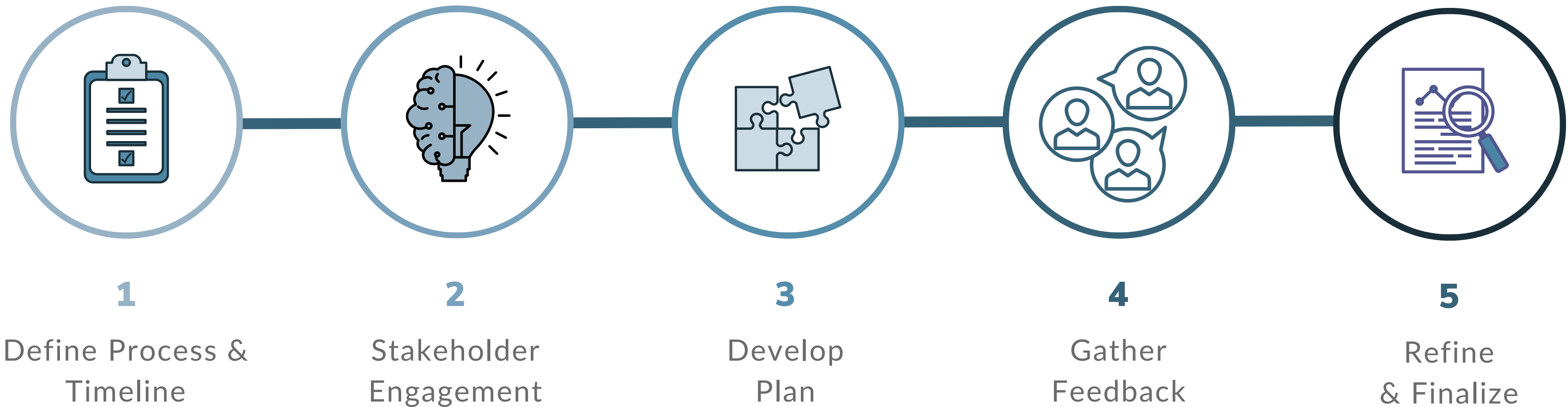
Does your organization have an existing / Votre organisation dispose-t-elle d'un



Which component might be most challenging / Quel composant pourrait être le plus difficile ?



Steps of Developing a Strategic Plan



Steps of Developing a Strategic Plan

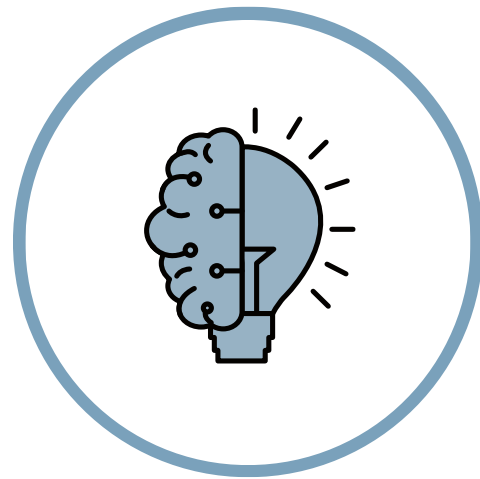


1

Define Process &
Timeline

- confirm which steps you will include in your process
- identify key milestone dates
- build your Strategic Planning Team
- contact participants involved in each step

Steps of Developing a Strategic Plan

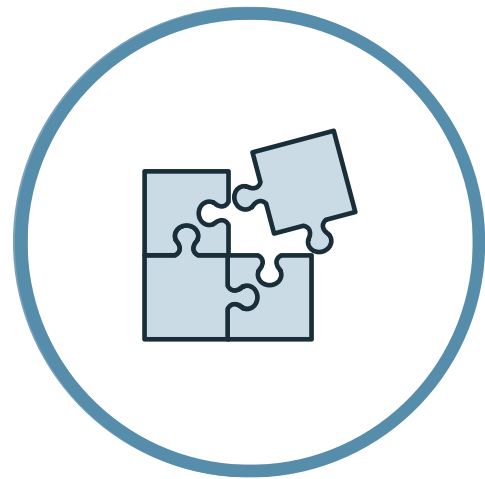


2

Stakeholder
Engagement

- consult with a wider audience
- survey, focus groups, interviews
- “what’s going well?”, “where should we focus?”, “share some bold ideas to consider”

Steps of Developing a Strategic Plan



3

Develop
Plan

- review stakeholder engagement input
- draft vision, mission, values, priority areas
- review and revise
- develop outcomes and initiatives

Steps of Developing a Strategic Plan



4

Gather
Feedback

- consult with stakeholders again
- share draft and gather feedback
- “what is missing?” and “how could this be improved?”
- may be a smaller stakeholder group

Steps of Developing a Strategic Plan

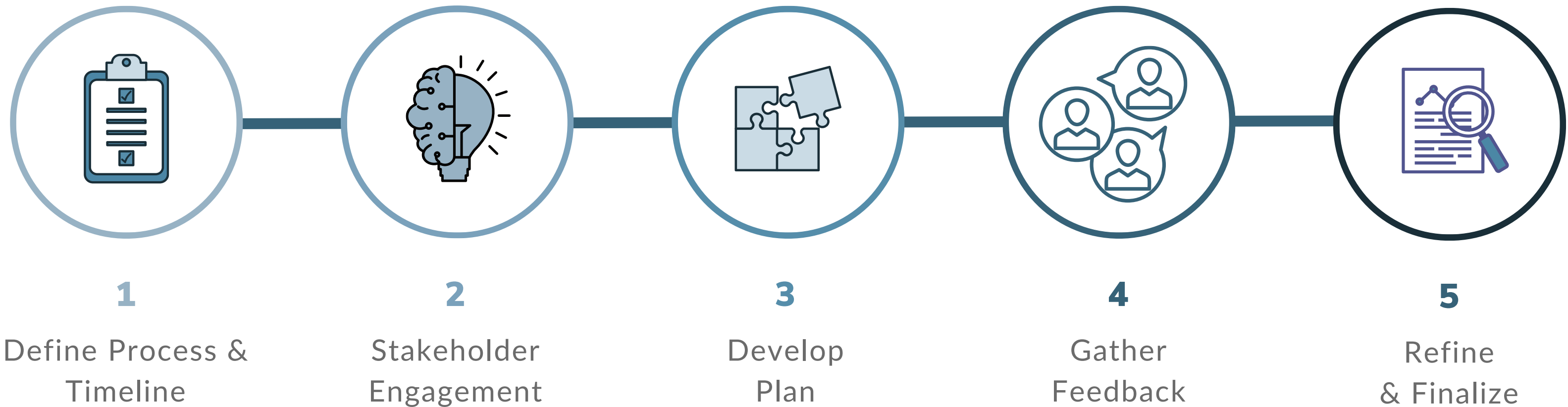


5

Refine
& Finalize

- review the content and feedback (if applicable) and refine your plan
- approx. 95% complete
- may be a smaller group
- approve the plan

Steps of Developing a Strategic Plan



A Solid Start

- Who – Key roles and responsibilities
- Where – How should you gather?
- What – Supplies you'll need
- When – Timing best practices

SAMPLE AGENDA OCTOBER & NOVEMBER



BACKGROUND INFORMATION

- Current Mission, Vision & Values
- 2020-2024 Strategic Plan
- Stakeholder SWOT Summary Report

AGENDA - SESSION 1

Objectives: Review Mission, Vision & Values; Consider SWOT input and areas of focus

- 7:00** Welcome
 - Introductions & Objectives
 - Overview of Series & Context
- 7:20** Mission, Vision & Values Warm-up
 - What excites you most about the current Mission, Vision, and Values?
- 7:40** Strategic Priority Areas
 - What stands out to you from the SWOT summary?
 - What are the big ideas/possibilities that you see?
 - What are some themes that should inform this planning?
- 8:40** Wrap-up
 - Discuss Next Steps

WHO



Roles:

- 1 Facilitator or 2 Co-Facilitators
- Timekeeper
- Logistics Manager

WHERE

- Virtually
- In Person
- Hybrid*



WHAT

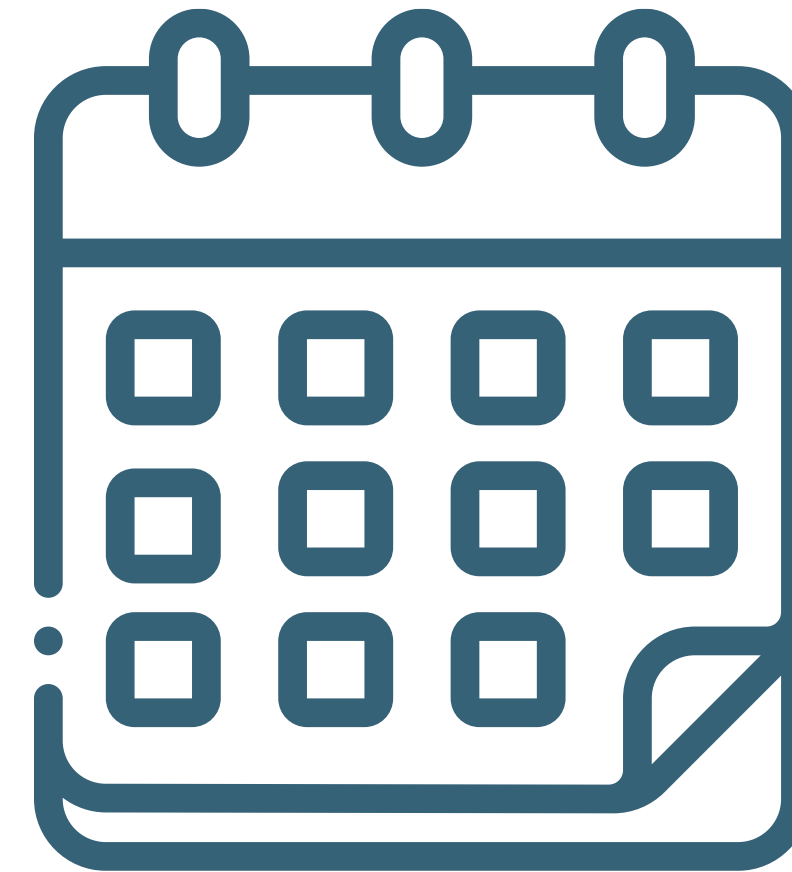


You'll need...

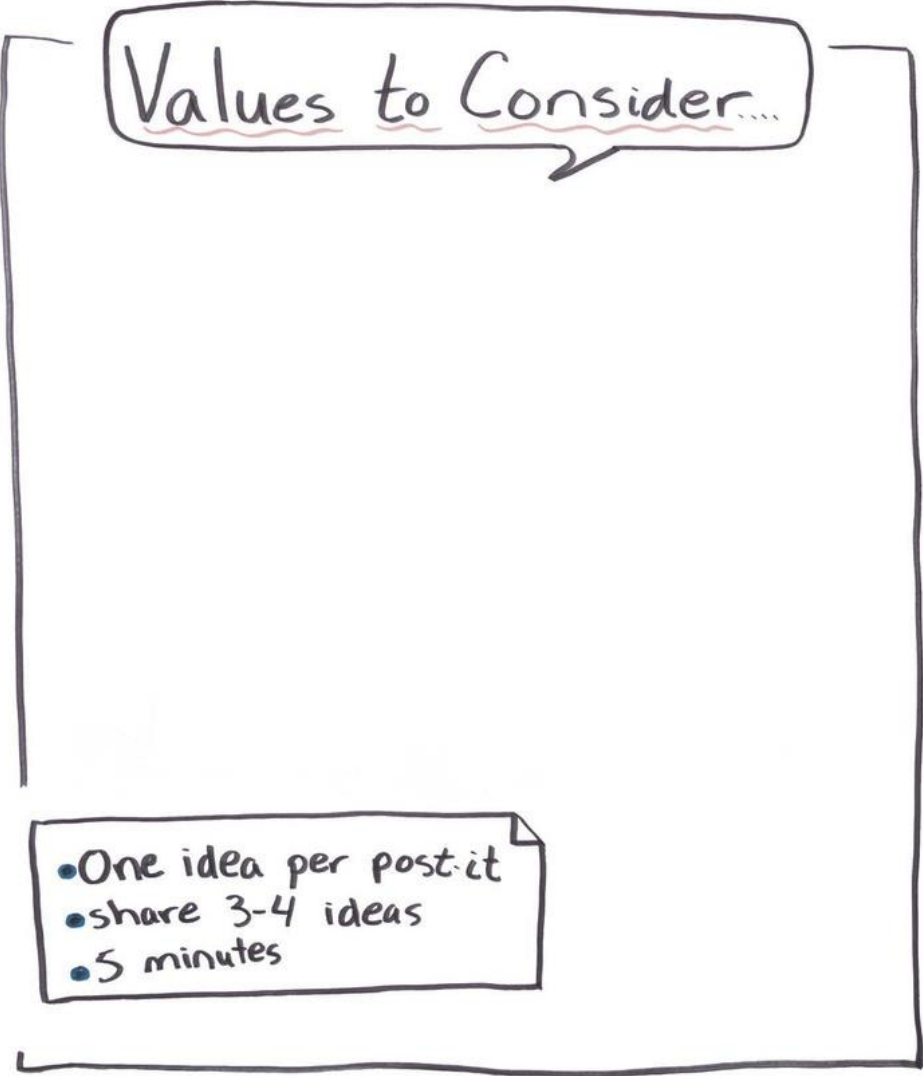
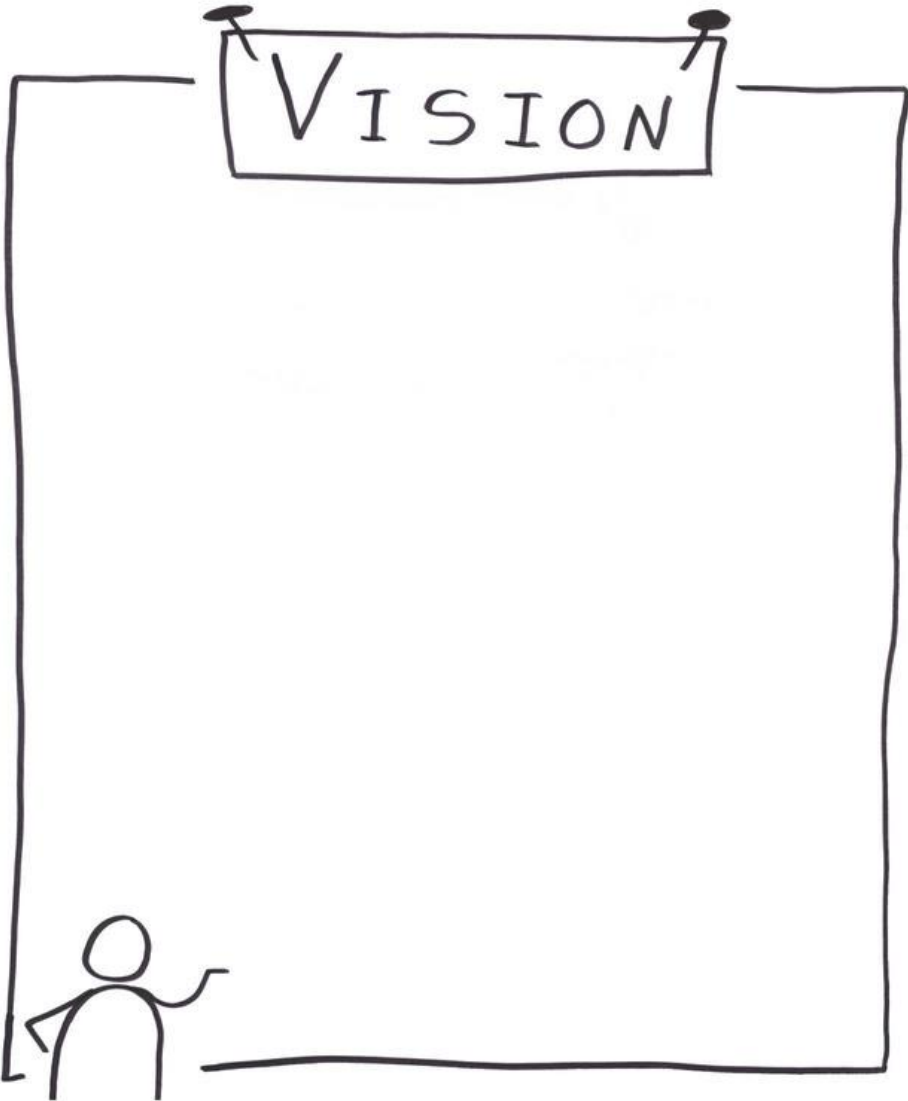
- Round tables with chairs, including a few extra tables for breakout groups
- Flipchart paper
- Sticky notes of varying colours
- Markers, tape, scissors
- A projector and screen may be beneficial though are not required

WHEN

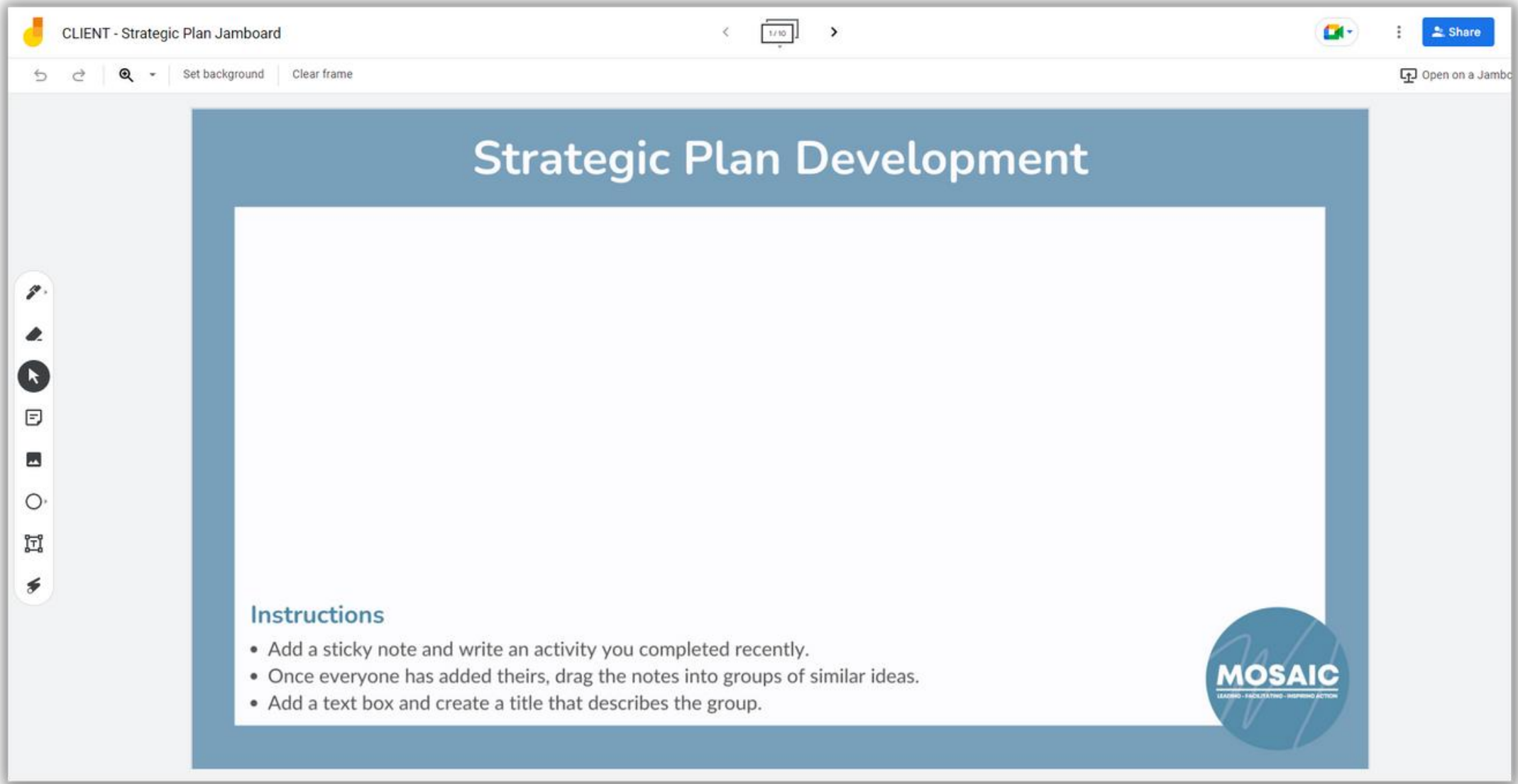
- Intended deadline
- Workback plan
- Existing meeting times you can leverage



Tools & Materials - Flipcharts



Tools & Materials - Jamboard



Tools & Materials - Collaborative Doc & Graphic Design

ORGANIZATION LOGO

Organization Name
Strategic Plan - YEARS

Values
Insert Values & Definitions

Vision Statement
Insert Vision Statement

Mission Statement
Insert Mission Statement

Strategic Plan - DATE

1

VISION
To be the resource for everything real estate.

MISSION
A non-profit association dedicated to strengthening its diverse membership in serving the public in an ethical and professional manner.

VALUES

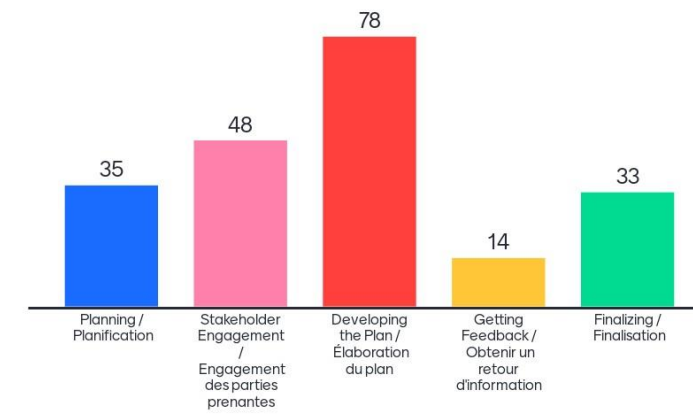
- Ethical
- Resourceful
- Community-focused



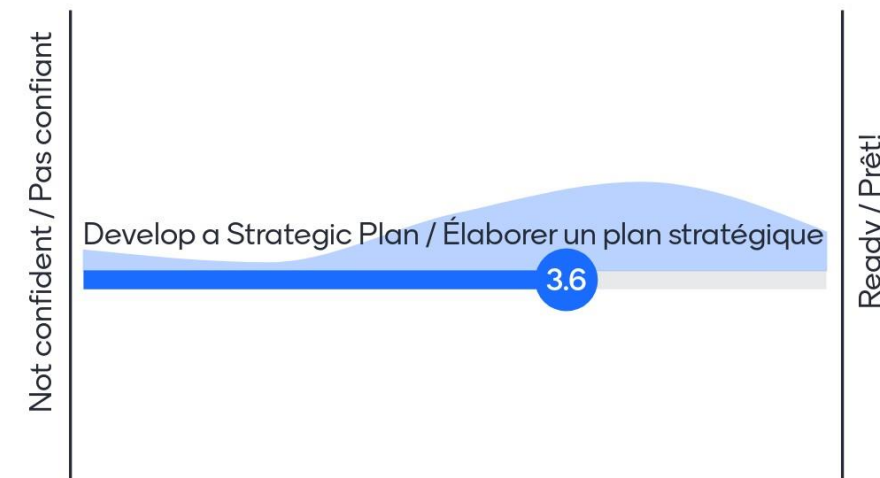


LET'S
ENGAGE

Which part are you most looking forward to / Quelle est la partie que vous attendez avec le plus d'impatience?



How confident are you / Quel est votre degré de confiance?



Strategic Plan Toolkit

- Low-cost toolkit outlining with instructions, timing and prompting activities to help complete your plan
- Includes worksheets to use as you develop each component
- Can be customized for your organization or your member organizations



STRATEGIC PLAN TOOLKIT

Notes on pillar outcomes:

Polished pillar outcomes:

Outcome 1	Outcome 2	Outcome 3	Outcome 4

Strategic Plan Development Program

- A budget-friendly, step-by-step process for developing your plan
- Can be completed at your organization's own pace, with Mosaic's guidance along the way
- Includes videos, resources, and templates
- PLUS – reference materials from today's presentation

The image displays two overlapping screenshots of the Mosaic Strategic Plan Development Program interface. The top screenshot shows a landing page with the Mosaic logo in the top left, navigation links for 'All Courses', 'My Dashboard', and 'Megan F.' in the top right, and a central text area asking 'Ready to build your organization's foundation and develop your strategic goals?' with a 'Yes! We're Ready!' button. The bottom screenshot shows a course overview page with the Mosaic logo and navigation links at the top, a 'Strategic Plan Development Program' title, a brief description of the program, and a 'Start this Course' button. A sidebar on the right lists course modules: 'Program Overview - Welcome!', 'Module 1 - Stakeholder Engagement', 'Module 2 - Vision, Mission and Values', 'Module 3 - Strategic Pillars', 'Module 4 - Outcomes', and 'Module 5 - Review & Refine'. A video player window is open, showing 'MODULE 6 MAJOR INITIATIVES' with a 'COMPLETE & CONTINUE' button at the bottom.

Strategic Plan Facilitation

- Customized, facilitated process from the beginning to end of your organization's strategic plan
- Working together with Mosaic, you decide which steps of the process will best suit your organizations needs, wants and resources
- Engaging, fun, not painful and not boring!



Supporting Your Strategic Planning

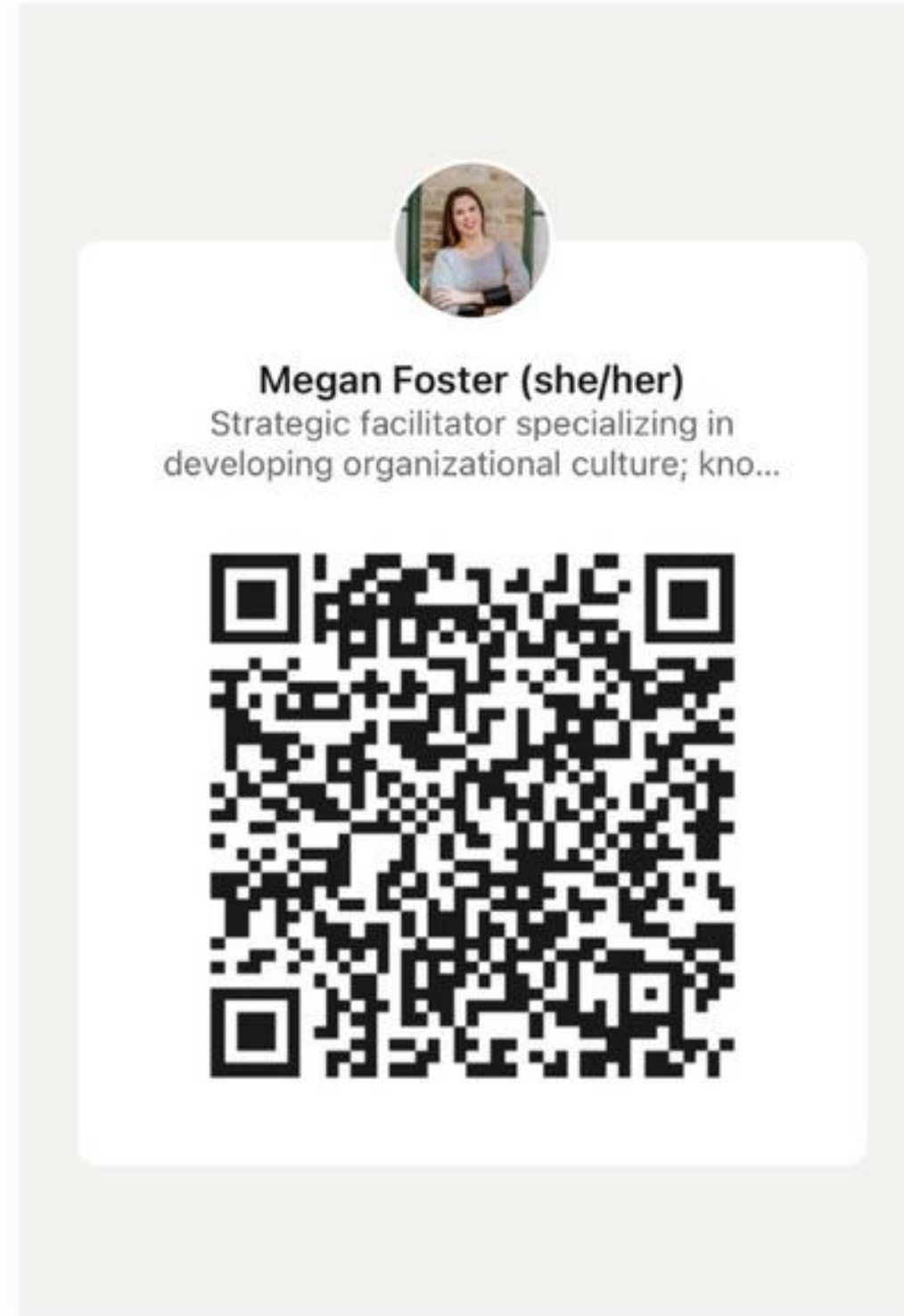
Find more information about these and other support we can offer at

mosaicengagement.ca/services

QUESTIONS?



Connect With Me



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THANK YOU

