

From Strategic Plan to Program Plan and Back Again

March 21, 2007

Web Conference Proceedings

at the Centre for Health Promotion
University of Toronto

Core Content & Participant Questions	Facilitators' Advice/Comments (Robb MacDonald/ Nancy Dubois of THCU)	Participant Comments	Examples of related work done or in process / Recommended Resources
Different Types of Planning			
<p>What is planning?</p>	<p>Planning is a series of decisions,</p> <ul style="list-style-type: none"> • from general strategic decisions (e.g., identifying long-term changes), • to specific operational details (e.g., program implementation timelines & costs), • based on the collection and analysis of a wide range of information. 	<p>More than half of participants were currently involved in strategic planning.</p> <p>Two had hired external consultants.</p> <p>One was in the very early days of getting started, another had just completed a community consultation, and another had completed the plan itself and was in the process of communicating and implementing it.</p> <p>All identified steps consistent with those presented in the Webinar.</p>	<p>Simcoe Muskoka Health Unit has just completed a Strategic Plan through the involvement of an external consultant team.</p> <p>Sandy Hill Community Health Centre (Ottawa) has just completed community consultations as part of a strategic planning process and have used internal resources.</p> <p>Those not currently involved in strategic planning anticipated that they would be shortly, most often in the role of supporting others.</p>
<p>Clarification of other related terms</p>	<p>Accepted definitions may vary.</p> <p>The most important point is that all those working to develop the same plan (i.e., in one organization, a coalition, in a community, etc.) all use the same terms, the same way.</p> <p>A Program Plan summarizes the purpose, objectives, outcomes and general activities planned to accomplish the stated objectives.</p> <p>Typically a program plan is established once in a</p>	<p>It is well worth the time and investment to do a strategic plan well and thoroughly up front.</p> <p>It need not be done all that often, but it needs to be done well.</p> <p>The difference between a program plan and operational/workplan was the area of greatest confusion across participants.</p>	<p>Alliance for Non-profit Management (http://www.allianceonline.org/)</p> <p>Charity Village has an entire section devoted to articles and resources on strategic planning - http://www.charityvillage.com/cv/research/rstrat.html</p>

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	<p>program cycle (most often a year).</p> <p>An operational plan provides the details associated with who will do what, when, and with what resources.</p> <p>An operational plan is re-visited much more frequently, perhaps daily.</p> <p>A Mission can be developed right after the Vision, especially when a new group is forming and sorting out their fundamental purpose or mandate.</p> <p>The mission might also be developed or revised after agreement on strategies. In this way the mission can be shaped to reflect the types of work the group will be doing.</p>		
<p>Q: Many of us have to submit yearly “operational” plans to our funders with budgets, goals and targets for the next year. Would these be called business plans?</p>	<p>Different from program plans:</p> <p>A business plan typically includes a justification or rationale component.</p> <p>A business plan generally contains less detail, focusing instead on a broad concept or approach.</p> <p>A business plan often addresses the full scope of an organization’s business and not just one specific program.</p>		
<p>How does a Vision differ from a</p>	<p>A Vision is a description of the preferred future relative to your work.</p>		

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Mission?	<p>It may be shared by many organizations that all contribute in some way to that endpoint.</p> <p>A Mission is distinct to each group working towards the Vision. It describes their mandate or purpose.</p>		
When should indicators be included in a plan?	<p>Indicators are most commonly used when an evaluation will be attached to the plan.</p> <p>Indicators show “what will it look like when we succeed” or “how we will know we are making progress”.</p> <p>Indicators should be attached to specific short- and long-term objectives.</p>		
Strategic and Program Planning			
Where does strategic planning stop and program planning begin?	<p>A typical strategic plan addresses the Vision, Mission, Values (or Principles or Beliefs), Long-term Goals and Strategies of an organization.</p> <p>It is usually covers a 3-5 year term.</p> <p>It addresses the overall business of an organization.</p> <p>It may identify several programs within each strategy.</p>		<p>The Ottawa Charter for Health Promotion is an example of a framework with five strategies included in it. (http://www.phac-aspc.gc.ca/ph-sp/phdd/docs/charter/)</p> <p>THCU's Program Planning Process has six steps http://www.thcu.ca/infoandresources/publications/Planning_wkbk.content.apr01.format.oct06.pdf</p>

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	<p>In a program plan, each program is addressed in more detail.</p> <p>It typically covers a shorter time period, often a one-year period.</p> <p>Once a strategic plan is developed, approved by the governing body, then communicated to all the internal and external stakeholders, a series of program plans are developed to describe the components within it.</p>		<p>The Middlesex-London Health Unit's Planning Cycle diagram (in Webinar slides) is a great example of integrating plan development for the future with current implementation and reflection on the previous year.</p>
<p>Are there templates or supports to develop a strategic plan on our own?</p>			<p>Strategic Plan template example: http://www2.fhs.usyd.edu.au/arow/o/m05/pp05.htm</p> <p>Excellence in Strategic Planning – a workbook and on-line template for government agencies at: http://www.exec.gov.nl.ca/exec/cabinet/transacc/pdf/MasterTempStrategicPlan.pdf This is a clear language, easy to follow process that is consistent with the information presented today.</p>
The Planning Process			
<p>How do I know how to approach the planning process – what type of process is best to use? How</p>	<p>There are three basic types of planning processes, each with its own strengths and challenges.</p> <p>A good facilitator can determine, in advance, or during a session, which is best suited to the circumstances.</p>		<p>Peter Schwartz, The Art of the Long View: Planning for the Future in an Uncertain World. Toronto: Currency Doubleday, 1996. – He looks at the benefits of identifying or including</p>

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do you keep it realistic?	<ol style="list-style-type: none"> 1. Goal based planning <ul style="list-style-type: none"> - start your thinking around where you want to be; the outcomes that you want, the goals your organization has - then back up to identify how you will get there, what actions, milestones, strategies are required 2. Issue based planning <ul style="list-style-type: none"> - start by reflecting on an environmental scan, - identify the key issues facing your organization - then write goals for each issue - This is often the preferred approach when a realistic plan is needed – rather than “shooting for the moon”. 3. Organic strategic planning: <ul style="list-style-type: none"> - This process has very little structure. It moves where the group wants to go. - It can mean “jumping” between topics such as vision, mission, actions. - When really tight for time or there are people involved who don't want to think about intermediate things like goals or objectives, this can be effective. Others may find it frustrating. 		<p>scenarios into your planning process and then going through a stepped process to identify which scenario would be most advantageous to you. This scenario approach typically requires more time in a strategic planning process.</p>
Who should be involved in the planning process?	<p>This engagement of stakeholders is one of five THCU recommended Project Management components to planning. These are:</p> <ol style="list-style-type: none"> 1. meaningful participation of key stakeholders; 2. time; 		<p>Project Management aspect of Program Planning in THCU workbook (p. 9).</p> <p>Stakeholder Participation Wheel (ibid) – p.15</p>

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	<p>3. money and other resources; 4. data-gathering and interpretation; and 5. decision-making.</p> <p>THCU's Stakeholder Participation Wheel can assist you in determining who should be on the Core planning team, who should be Involved, who should be Informed, and who is on the Periphery.</p> <p>There are generally four key groups or individuals that end up being involved in the strategic planning process:</p> <ol style="list-style-type: none"> 1. Overall planning team 2. Process planning committee 3. Stakeholders 4. Consultant/facilitator. <p>Most experts would agree that this should be done as a team to help ensure buy-in for the process as well as the planning results.</p> <p>Involving many people is positive because it means the inclusion of many points of view. However, too many makes decision-making very cumbersome.</p> <p>The ideal number for a planning group is between 8-15 people. Some of those people should be dedicated to shepherding the process.</p> <p>There should also be a blend of people with a long-term planning perspective with others who are more operational and practical.</p>		

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	This may mean a balance of volunteers, staff, and community partners.		
<p>Q: Sometimes the organization doesn't take as much ownership in the process when they hire a consultant. They expect the consultant to produce the plan.</p>		<p>The greatest benefit of working with consultants is objectivity.</p> <p>Also, they are able to do a lot of the leg work, including interviews and environmental scans that would have taken a lot of time internally to complete.</p>	
<p>Q: Are there ways to speed up the process and this stage quicker?</p>	<p>Let people know ahead of time what questions will be asked so they have time to think about it or gather research.</p> <p>Have a clearly defined purpose/goal for each meeting.</p> <p>Limit the time frame for discussion on certain topics.</p>		
<p>Q: Must a strategic plan cover and relate to all programs and services in the organization or is it possible that we do a number of things that are not related?</p>	<p>All initiatives (strategies, programs, and activities) should all directly relate to the Mission and Vision of the organization. If not, either the initiatives should be stopped as they represent "Mission Creep" or the Mission needs to be adjusted to accommodate for new activities.</p> <p>Meetings are not the only way to get information. You should have an alternative way for people to submit ideas (email, surveys) outside of the meetings. People may want to be anonymous, so a blog may not be the best way. You want to</p>		<p>Survey Monkey Zoomerang</p>

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	<p>hear the good, the bad, and the ugly. You also want to hear the faults of the organizations too, and people may not be comfortable doing this in front of others.</p>		
<p>Q: In the decision-making process, I find that people often miss the conversation on what the criteria will be for how they will make decisions. Will it be based on efficiencies, effectiveness, impact, etc?</p>	<p>If criteria does not exist, the Value statements established early on (usually with the Vision and Mission Statements) may help with this. They tend to be grounded in what is important to the group and reflects their philosophy.</p> <p>Ideally, the group would have gone through the 5 aspects of Project Management (see above) in which case who and how decisions would be made would already have been covered.</p>	<p>I find that there is a greater and greater expectation that evidence of effectiveness will be provided when we put forth a plan. It is tough to always find the outcomes for what we are doing.</p>	
<p>Who should actually write the plan?</p>	<p>Although the input to the plan should come from a large number of people, and the decision-making will be done by the designated people, it is recommended that a small group of 3-4 people (if done internally as opposed to by an external consultant) be appointed to actually write the plan.</p>		
<p>Q: How do you keep the Strategic Plan from getting too operational?</p>	<p>From the outset determine the elements that you see including in the Strategic Plan.</p> <p>Also, consider who has the power for making decisions.</p> <p>When something becomes the responsibility of a program manager and not the Board, for example, you have likely left the strategic domain.</p> <p>Or, when decisions being made do not affect the whole</p>		

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	organization, but rather only one or a few departments or programs, you have likely left the strategic planning domain.		
Q: What will decrease the likelihood that a strategic plan will sit on a shelf and not be used?			Carter McNamara's 13 tips in slides (note: the first 4 points on one slides are out of order with the other two slides): http://managementhelp.org/plan_dec/str_plan/str_plan.htm
Q: In terms of moving the strategic plan into action, are there models or tools that would help with implementation, especially in a multi-service agency?	<p>The Balanced Scorecard may be one approach worth considering.</p> <p>A Logic Model will help to build the case for what actions are necessary in order to accomplish the planned outcomes.</p> <p>There is a strong connection between the acceptance and understanding of the organizational strategic plan and the implementation. Only with widespread acceptance and understanding can new priorities be set and put into action as intended.</p> <p>A detailed operational plan template used across an organization that clearly identifies the required resources to accomplish the strategic plan is recommended.</p>		<p>www.balancedscorecard.org</p> <p>THCU Logic Model Workbook - http://www.thcu.ca/infoandresources/publications/logicmodel.wkbk.v6.1.full.aug27.pdf</p>

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Planning Models			
Q: How do you keep the plan realistic?	<p>The model used to guide the planning process can affect how realistic the plan is.</p> <p>For instance, the Needs Impact-based Planning Model, developed in Ontario and used by the Ministry of Health when setting the 1997 Mandatory Programs and Services Guidelines for Public Health, encourages decisions to be made based on four filters:</p> <ol style="list-style-type: none"> 1. What will address the greatest <u>need</u>? 2. What will have the greatest <u>impact</u>? 3. What is within our <u>mandate</u> to address? 4. What do we have the <u>resources</u> to address? 		<p>Needs Impact-based Planning Model (from THCU Program Planning Workbook) (include URL)</p> <p>Jossey-Bass - http://www.josseybass.com/WileyCDA/Section/id-303084.html?queryText=strategic+planning&subject=Nonprofit+Management+%26+Leadership&subjectId=131483 – This source carries the John Bryson resources on Strategic Planning which are considered by many to be the “industry standard”</p>
Miscellaneous Content			
Q: - Often I get told that everyone should be able to see their work in our strategic plan and visa versa. However, we have such a huge breadth of responsibility that this is pretty hard to do.	<p>The key word is “priorities”. A strategic plan that addresses priorities means that there are some areas that have been designated as more important than others but not necessarily instead of others. It is important to denote whether the Strategic Plan is about priorities or about all that you do.</p> <p>It is important to ensure that “all the oars be rowing in the same direction”. Therefore, even if an activity or program is not part of the established priorities, it at the very least should not be working at cross-purposes to those priorities.</p>		