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Strategic planning for nonprofit organizations canada

Home » Toolbox Organization: Centre for Professional Excellence Strategic Planning is a systematic approach to developing long-term plans to lead the organization for a certain period of time. The time period can be one to several years. Comprehensive strategic planning takes more time, money, and expertise than most nonprofit boards have at their disposal. The essential concepts in strategic planning can be applied over time to realize strategic planning without the need for large resources applied in a short period of time. Strategic thinking is essentially taking the main concepts and activities involved in strategic planning and incorporating them into regular board meetings. One of these main activities is the adoption of an interrogation approach to change that links the entire decision-making process to the main roles, responsibilities, duties and operational objectives of the Board of Directors. These are listed in the chart below: This direct guide guides nonprofits through the strategic planning process from vision to goals. It contains an commented reference list, which is a great starting point for deepening the ideas contained in this short guide. Download pdf categories: Conceptual Frameworks & Approaches Planning and Evaluation OUR PROCESS BRINGS TOGETHER THE BOARD & STAFF. The key to creating a large (actually usable!) The plan is to involve all the main stakeholders: Board, Staff (and perhaps some other key stakeholders who have strong relationships with you). We make the process engaging and powerful for everyone in the room and promise that your participants will have fun while strengthening their ties as a team. TWO-DATE PROCESS. Advice for nonprofits (mainly governance boards) asks whether they should involve staff in the creation of their strategic plan. A resounding Yes! You need their experience in advance and their buy-in later. In our process the Board & Staff all work together in small and large groups on the FIRST day to identify the overall priorities and strategies of 3 years. The second day involves a smaller group of key staff to dive further into the injections to dig up the actual activities year by year that will achieve concrete goals. (Note: For large organizations, we divide the first day into two or more shorter sessions.) WE CREATE A LIVING DOCUMENT THAT YOU CAN ACTUALLY USE. You can update/delete/edit content in minutes. We'd like to show you the color-coded and graphically pleasing model and describe it in a phone call of 20 Organize this call with David by email: david@nonprofithelp.ca Stratford Family Health Team I have been making strategic plans with organizations for over 20

years in 2 countries and this is the best process I have ever gone through. It's fast, kinetic, it's highly engaging, and your weighted scoring process to achieve priorities is excellent. Claudia Mior, Executive Director Association of Fundraising Professionals (Canada) David is an engagement master. In a he helped a well-opinioned group with a wide range of experiences and perspectives to coalesce around a plan and priorities that everyone felt proud and invested in. Ken Mayhew, President & CEO William Osler Health System Foundation Invasive Species Centre David's energy, knowledge and skill have helped our nonprofit board, ex-officios, and staff work together to generate and refine great ideas that will be at the heart of our updated and exciting strategic plan. It was a hilarious and action-packed experience! If your board or organization needs a catalyst for change you will be amazed at what it can do! Kandyd Szuba, PhD, RPF, Canadian Council President Interagency Forest Fire Centre It was everything I expected and more. Kim Connors, executive director. [Quote from a participant: As a stranger you asked questions that no one else would ask, it forced us to look at things from a different perspective. It went very well, the group responded well, they appreciated the way it was driven, that you all kept Brian Wiens, Director of Operations and Planning, Natural Resources Canada on duty.] First Step Women's Shelter I had the privilege of being part of a strategic planning and board training session led by David Hartley. Over the years I have participated in a number of similar sessions. This was by far the best! The materials were relevant, practical and colorful. David's style and presentation kept me fully engaged over the course of a day and a half. Most importantly, our organization ended up with very practical documents and action plans that we will actually be able to implement. I recommend to any non-profit organization of any size. Andreas Asmus, General Manager – Legal Aid Ontario, Northwest District (and Vice-Chair of First Step Women's Shelter, Sioux Lookout, ON) Immigration Consultants of Canada Regulatory Council Very positive comments from both [our] SMT & Staff. Everyone was grateful to be included in the process, but they really reset the opportunity to meet and get to know the Council - and achieve genuine buy-in! ... I also made a point of eating with the staff today and received a lot of positive, positive and unseeded comments - from all accounts... productive, engaging, fun and valuable team building day [process]. Stephen Ashworth, President & CEO Discovery Childrens Centre Thank you for bringing your energy, humor and skill to our strategic planning day. The staff, board and management team enjoyed the time immensely. We laughed, challenged each other, dreamed, which led to great results including a more cohesive team. Ron Blatz, Executive of the Winnipeg St. Marys Memorial Hospital Foundation Phenomenal, fun, tied up [for all our stakeholders involved] and educational. Krista Linklater, Executive Director REBOUND (Youth Centre) Thank you very much David!! [The final document of the strategic plan] It all looks FABULOUS!! Carrie McEachran, Executive Director of the Canadian Council for Continuing Training at Sarnia-Lambton Sarnia-Lambton Our strategic planning sessions have been phenomenal. David was very practical, kept us motivated and energized the whole time. We have created a plan that is not only visionary, but achievable. Our previous plans always required an almost immediate review. This is much more focused and strategic. Barbara Thomas, Chairman of the Board of Directors (and Chairman of the Newfoundland and Labrador Pharmacy Provincial Council) Harrow Family Health Team I am incredibly pleased with your recent facilitation of the Strategic Planning Session of the Harrow Family Health Team. You are energetic and made the session fun but productive and focused. Your ability to relax the group and motivate everyone to participate fully was impressive. I have participated in a number of strategic planning sessions over the years and your efforts on our behalf have exceeded all expectations. You did a stellar job! Merrill Baker, Board Chairman, (Windsor Ontario Attorney with Sorensen Baker Professional Corporation) St. John Ambulance – York Region Branch Thank you so much for your work with us. We welcome our strategic plan. Our key volunteers appreciated the contribution and will be more invested in helping us achieve our goals, and our staff took their great suggestions and ideas and shaped them into achievable goals. We have a smart direction for our next five years and look forward to the trip! I hope to work with you again in the future. Lynn McLarron, Executive Director Canadian ADHD Resource Alliance CADDRA now has a new strategic plan that encompasses the Council's vision and objectives and provides a practical framework for their achievement. David's guidance was invaluable. Not only did it create a safe space for the board and staff to share their ideas, but it also ensured that the whole process was a fantastic and fun learning experience. Niamh McGarry, Executive Director Taddle Creek Family Health Team David helped us understand what's important to us in our strategic plan. It facilitated an inclusive, energetic and meaningful strategic planning process in which 96% of staff [over 40] and doctors were rated good for great use of their time. He has the ability to engage a group in a warm but direct way by instilling humor to keep everyone alert and engaged. He is very professional, knowledgeable and reliable. We look forward to implementing our plan immediately. [And with regard to the final document of the Strategic Plan] I love the images and the one page-a-year approach. Sherry Kennedy, Executive Director, (Bay/Bloor Streets), Toronto 2) TWO DAYS - MORE DETAILS Let's create together the first or 3rd or 20th strategic plan of your Non-profit together!3b) OUR FEES 2020: FOR ORGANIZATIONS WITH MORE THAN 40 DAYS OF PARTICIPANTS: Option C - The process (and the hours we need) changes in some way based on the complexity and size of the organization. The commission will depend on several factors, please send an email to David to set up a phone call. 3c) ADDITIONAL COSTS Extended travel: if your location is greater than 4 4 travel time (there and back) from our location (near Pickering, Ontario) and/or requires an overnight stay, we increase our rate based on actual travel time. To date, David has worked with organizations in over 170 Canadian cities. [Note: If there are travel delays (e.g. due to adverse weather conditions) we do not add to this supplement, so you know that your fee will not change]. The costs of HST/GST & Travel are also: David has assisted nonprofits/charities in over 170 Canadian cities since 2007 in each province, yukon and n.w.t. option a with Back-to-back 2 Days: We really only suggest this if travel costs are an obstacle to the breakdown of the 2 dates. Due to the intensity of the work we have to complete in the evening between the two back-to-back days we charge a \$500 surcharge. Option A or C with Split Days: There are some organizations that can't close their offices for Day One, so we have to hold two half-day sessions on that day (half the group in each). Due to the additional work this creates for step 2 we have a \$750 surcharge. Unique situations: There are organizations, which because of their complexity, or because it is a last-minute planning process, that we will charge more than the above fees. High-budget charities & health facilities (over \$5 million in annual expenses) and government/municipal and for-profit organizations: we have personalized rates that will be higher than our normal rates listed above. We customize the preparation and content according to your needs. Needs.

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