



LARIDAE
COMMUNICATIONS INC.



PAFN

Strategic Planning Innovation

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February 27, 2014

Agenda (1 hour)

- Welcome & Introductions
- Why Organizations Plan?
- What is a Strategic Plan?
- Plan the Planning
- Define Roles
- Planning Tools and Processes
- Establish a Mandate for change
- Two Deep Dives
- **Four Innovations** in Planning for NPs
- Wrap-up & next steps

Laridae Communications Inc.

Who we are

Laridae Communications Inc. helps mission-driven leaders who are passionate about their work and have a strong desire to plan, brand, and communicate more effectively and improve their organization's results.

Located in Peterborough, Laridae's team has proven success in managing and communicating change, crafting organizational stories that resonate, developing new brand identities, shaping marketing and business strategies that work, and helping organizations to create inspiring, transformational plans.

What we do

Laridae works with organizations of all sizes in urban and rural communities across Ontario. Our clients are in healthcare, social services, education, government, the arts and economic development. They range from small charities, to national membership-based organizations, to agencies. www.laridaecommunications.com

Recent Projects

Laridae Communications has recently led the following organizations through strategic planning initiatives:

- Peterborough County-City Health Unit
- East Kawartha Chamber of Commerce
- Peterborough Family Resource Centre
- Brock Community Health Centre
- Community Counselling and Resource Centre
- YWCA Peterborough, Victoria & Haliburton
- Kawartha Sexual Assault Centre (in progress)
- Trent Centre for Community-Based Education (in progress)



Why do organizations plan*?

- For readiness
- For relationships
- To rationalize

What is a strategic plan?

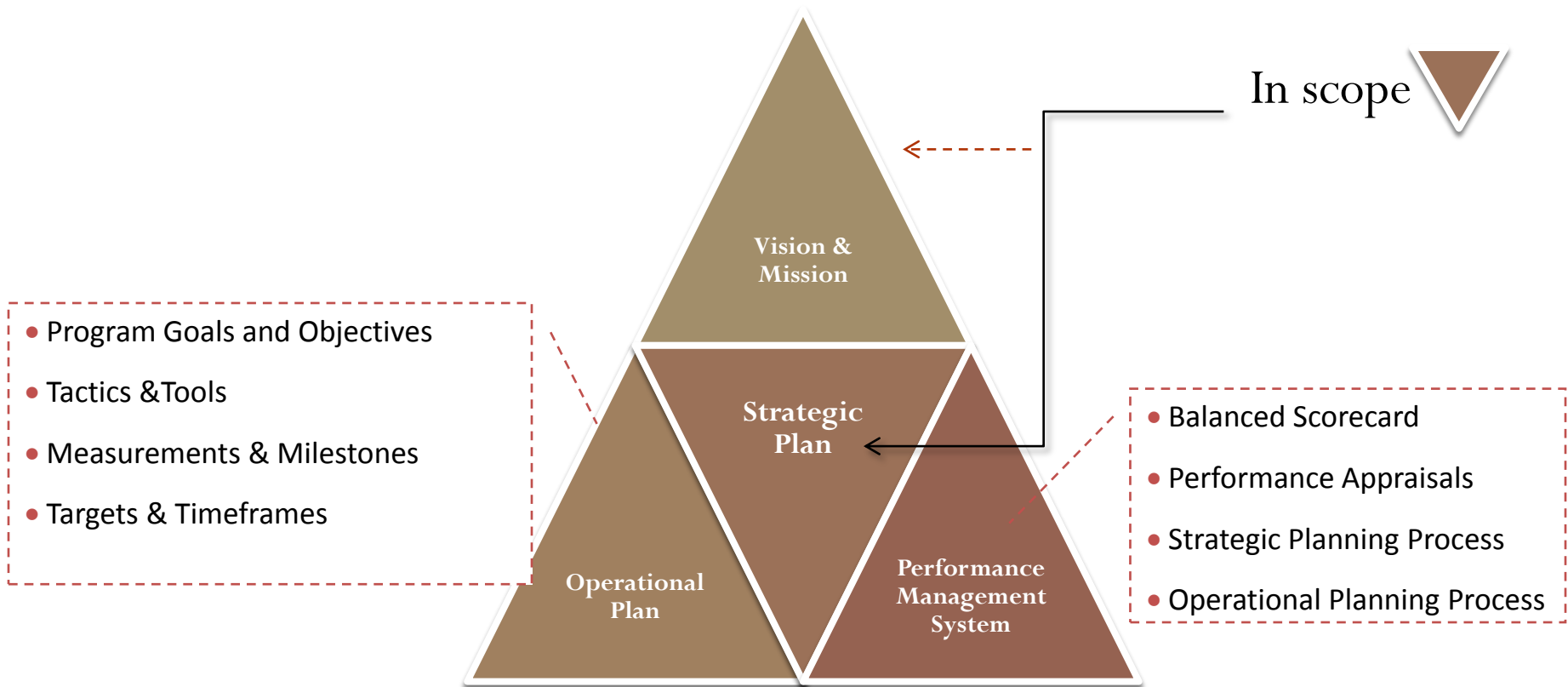
A strategic plan is...	A strategic plan is not...
A chance to define and describe a desired future	A description of the current state
A road map for the organization to realize that future	An actionable to-do list
An approved document to guide decision-making on priority fronts to pursue the mission & vision	A complete reference for the organization (exclusive of bylaws, collective agreements, legislative obligations, management practice, policies)
Oftentimes change – it enables the movement of money, people and resources	Written within the context of what an organization can achieve today
Driven by an operational plan	An annual operational plan, or ED's goals
Owned by the board	Owned by the staff
Multi-year direction (three to five)	Time-limited direction (i.e. not applicable beyond the current year)

Plan your Planning

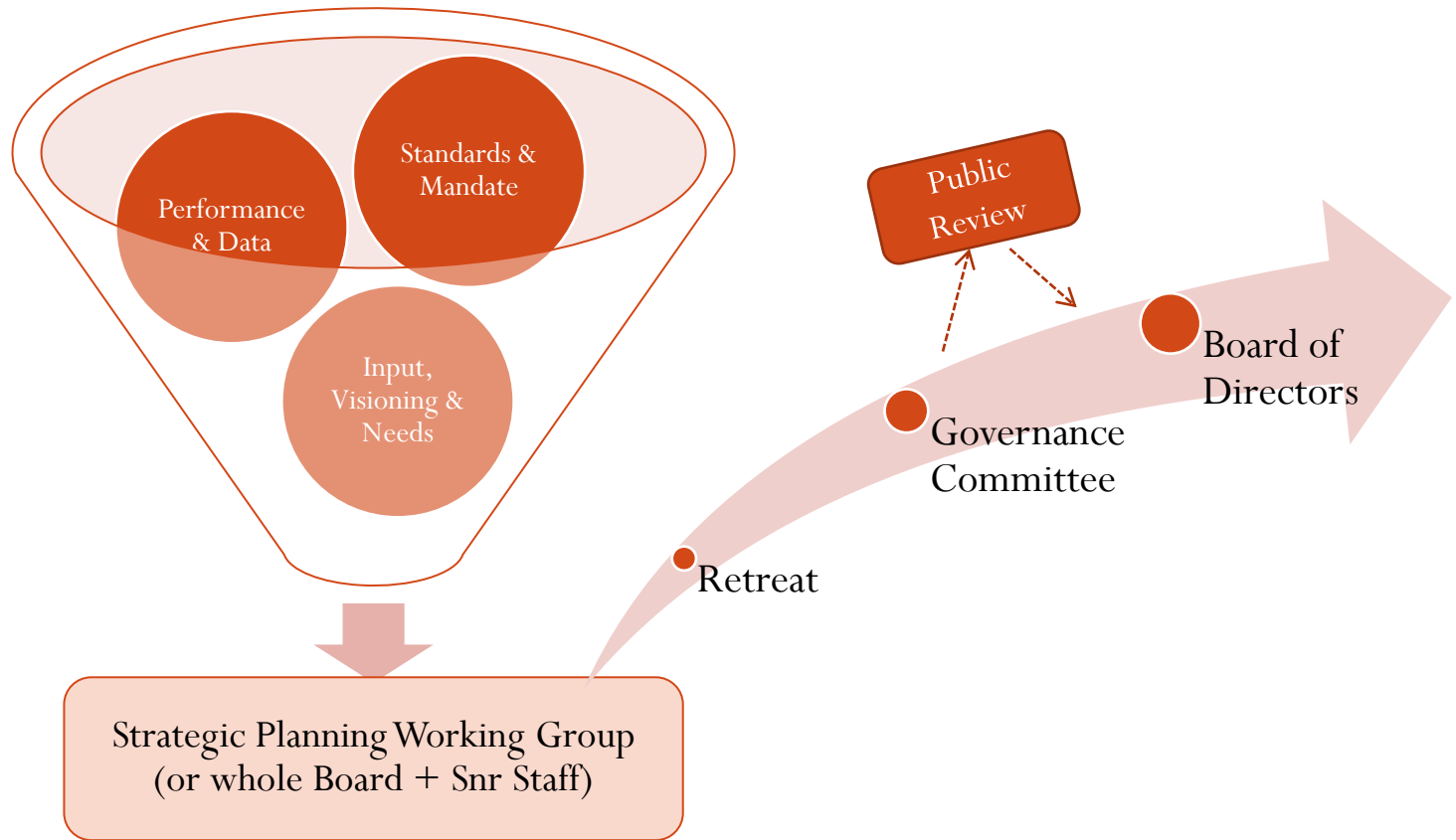
- Begin at the end. Ask, what should be the legacy (or legacies) of your planning process?
- Decide what is in scope & out of scope. Write it down.
- Write down a clear, simple goal statement for the planning process.
- Define the tangible objectives of your process. Write it down.

Planning Scope

Each element supports a high functioning organization



Tools Plus Process = Rigor

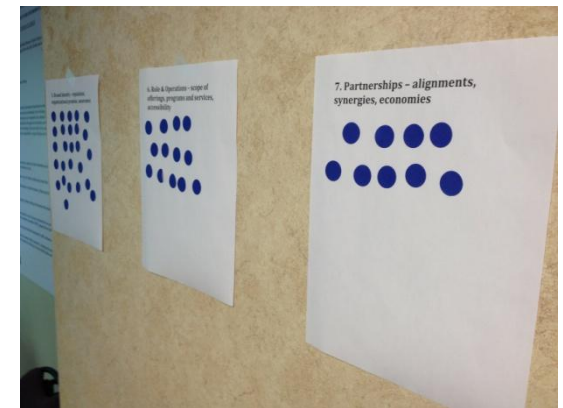


Establish a Change Mandate

- Know your organization's appetite for change.
 - Board
 - ED / CEO
 - Staff
- Where is your organization in the change cycle?
- Planning enables change. Check back in.

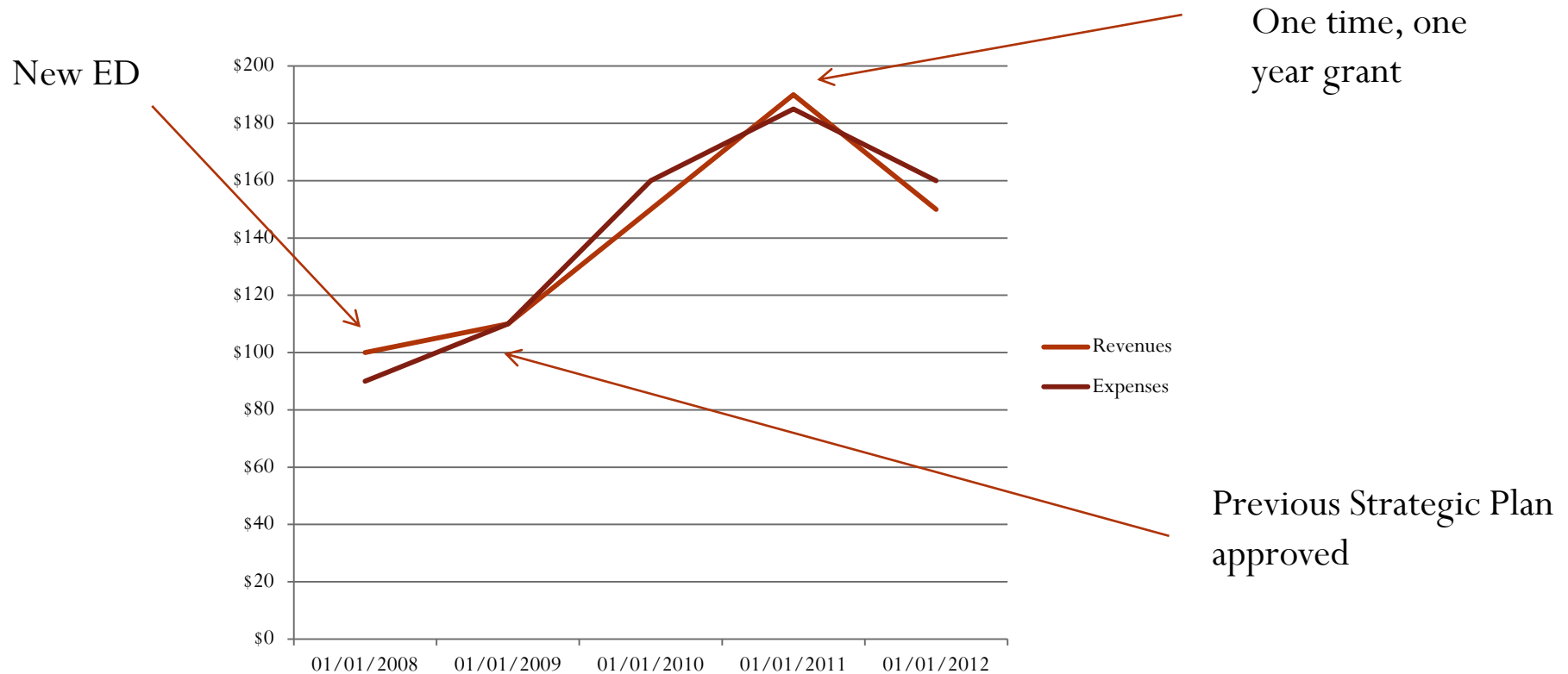
Deep Dive #1: Stakeholder Engagement

- Online surveys?
- In person? Groups? Individuals?
- Existing data, or gather new?
- Third party assistance
- Feedback loop



Deep Dive #2: Performance Review

- Know your own history. Be able to tell the story.



Five Reasons Plans Fail

1. You articulate the status quo

Five Reasons Plans Fail

2. Right plan, wrong team

Five Reasons Plans Fail

3. Too operational: stale date, NIFO.

Five Reasons Plans Fail



4. Fail to make it “live”

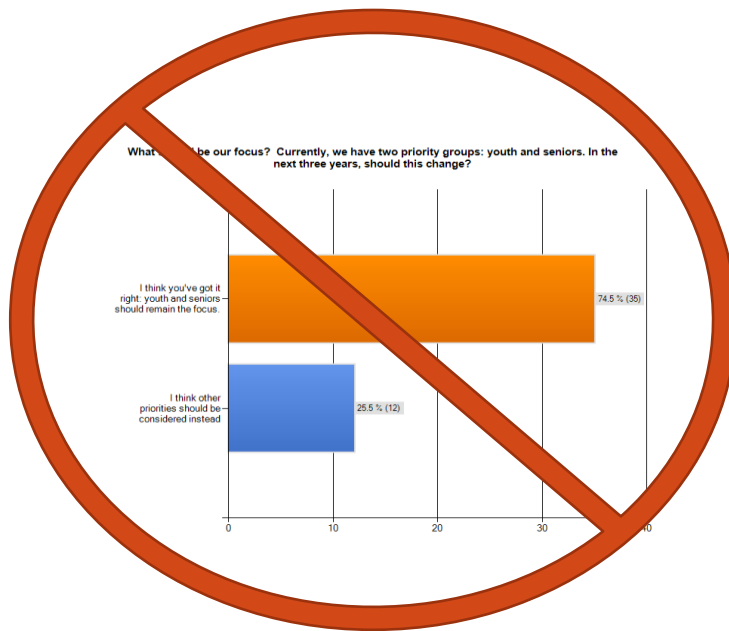
Balanced Scorecard

<MONTH, YEAR>

Objective	Progress Status	Performance Indicators	Result Status	Months at Current Status	Target	Actions in next 3 months
Excellence in Rural Primary Health Care						
1.						
2.						
3. To complete the new facility, on time and on budget	●	Progress on milestones on high focused priorities: <ul style="list-style-type: none"> task one task two 	▲	1		<ul style="list-style-type: none"> action one action two action three
4. To meet deliverables and volumes in CE LHM accountability Agreement	●	<ul style="list-style-type: none"> Increase in total revenues compared to previous years (as of Q2) % increase of total primary care clinic visits (as of Q 2) 	+3.5%	1	+5%	<ul style="list-style-type: none"> Define objectives, milestones and minimum targets for each activity. Decide on which medium/ emerging priorities should be reported on scorecard
Partnerships and Integrations						
5.		# and status of planned improvement projects	◆	4		
Communications						

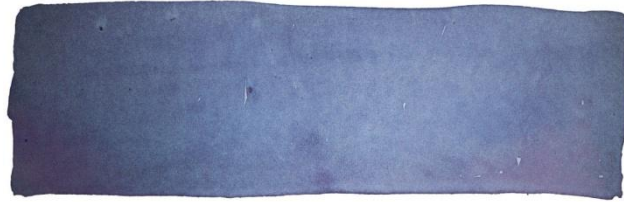
Five Reasons Plans Fail

5. Wrong Plan: Bad assumptions, confirmation bias, no data

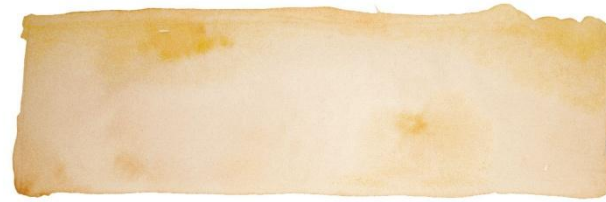


Strategic Planning Innovation

- **Courage** – to have really difficult discussions, to listen to all voices, to own past mistakes or results or performance, because if not during planning, then when?
- **Invention** – if “today” isn’t good enough, or right, or it’s just plain bad, then design a new tomorrow.
- **Honesty** – when the truth is spoken, it feels better. Honesty leads to vulnerability, which leads to creativity.
- **Commitment** – disagree, then decide. Then join, or leave.



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Thank you!

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