

## Case Study #1:

### Strategic Planning: Townshippers' Association Experience



#### A. The Issue

As Townshippers' Association (TA) continued to support the English-speaking population it served, the need to provide more services and support was also increasing. The Eastern Townships Community was also developing new needs and priorities as it evolved. The TA was dedicated to helping and meeting all these emerging needs and requests of the community. However, board, committee, and staff members were becoming overwhelmed, and felt a need to re-focus their energies and resources.

In addition to re-focusing the mandate and resources of TA to more effectively meet the needs of the community, external factors were also forcing the organisation to re-align resources and planning processes in a more strategic and results-based way. For example, some Government funders were looking for greater accountability in how organisations plan, assess, and document changes in achieving a long-term desired vision.

"We were taking on a lot of things, we needed a process that would help us be more focused ... a process that would allow us to have a broader impact, yet not overload staff and board...we needed to re-visit what we were doing, re-look at our resources, and help us re-align our efforts towards common long-term goals and objectives."

(Erin Mallory, Past Executive Director, TA)

"One needs to be reassured that the efforts put forward are making a difference, if not, it is easy to lose interest. We were looking for something that would help us plan and measure to see the difference we were making." (Peter Quilliams, Past President, TA)

#### B. The Process...strategic planning for long-term results

##### 1.0 Pre-planning: confirming the issue and adopting the plan:

The TA began to define a strategic planning process that would best help both board members and staff to become more focused and results-based in working to carry out a shared mission. In doing so, they sought advice and support from outside experts to act

as guides to the process. Two employees from the Holland Centre in Québec City donated their time to facilitate the strategic planning process.

A core group of TA board and staff spent time pre-planning prior to jumping right into a strategic plan. This time was dedicated to re-confirming the issues and reasons for engaging in strategic planning, and developing a long-term plan that would involve all board and staff members in the process.

Principal results stemming from the pre-planning included:

- A clearly defined plan that identified a long-term commitment to strategic planning (a commitment lasting well beyond a single planning day).
- Establishment of a strategic planning team that would ensure ongoing planning and execution of the plan.
- A need to gather a deeper knowledge-base that would identify the realities and perceptions facing them and the organisation.

"I felt the pre-planning was a very important step. Not only did the organisation identify champions to lead the process, they organized themselves and engaged the rest of the board and staff in a real meaningful and purposeful way."  
(Richard Walling, volunteer consultant)

## 2.0 Delivering the plan:

After pre-planning, the strategic planning committee moved forward in executing a longer-term planning process which consisted of the following steps:

- 2.1 Delivery of an analysis questionnaire to board/staff on perceptions and realities.
- 2.2 Design of a 2-day retreat covering the following topics:
  - 2.2.1 Introduction to strategic planning and validation overall plan.
  - 2.2.2 Presentation and confirmation of questionnaire results.
  - 2.2.3 Development of priorities based on results.
  - 2.2.4 Confirmation of strategic planning team.
  - 2.2.5 Implementation of post-retreat satisfaction questionnaire.
- 2.3 Implementing an Activity Analysis (which consisted of key staff members identifying each of the Association's activities, and analysing the financial and human resources each activity required, as well as its impact and relationship to the Association's mission.
- 2.4 Reviewing the resumé of activities in light of the Association's mission and re-defining the organisation's vision and mission.

2.5 Re-formulating goals, objectives, organisational structure, and activities to support the revised mission and vision.

The strategic planning process involved approximately 30 people, consisting of board and staff members. With support from the outside consultants, the TA strategic planning committee was responsible for developing each step, validating the process with board and staff, implementing the recommendations, and evaluating the effectiveness of their work along the way.

"I think board and staff were happy to know that there was a group of individuals who were taking action on their input. A lot of scepticism existed as some people had experienced a past retreat with no follow-up...this was different, and I think that helped in developing buy-in to participate fully in the process." (Jennifer Johnson, volunteer consultant)

### C. The Results..making it a part of our way of life!

The strategic planning process allowed for a re-defining of staff and board functions according to a revised set of objectives and committee mandates. Furthermore, a list of working principles were also developed which assisted committees and staff to work in a more evidence-based manner, and to plan actions in a more results-based way. For example, the working principles required both staff and volunteers to base their decisions on research about the community, to ensure that initiatives address Association objectives, and evaluate results of actions in the context of their objectives.

Committee structure and planning processes were also re-organized as a result of the revised long-term goals and objectives. The strategic planning committee was able to design an annual planning timeline organized around major events and funding deadlines. Meetings were also developed around this timeline, giving more purpose and organisation to each meeting. New committees were developed that better aligned activities to achieving long-term goals and objectives. For example, a knowledge-base committee was created to ensure that both the formal and informal evidence was collected and reviewed prior to deciding on new initiatives.

"I remember one time we were unsure whether to invest a great deal of time and effort in a proposed initiative. Referring to our principle to base initiatives on research, we first carried out a small pilot project which involved only 100 phone calls. This told us that, yes, the resources needed to make the 1000 other phone calls would be well invested."  
(Rachel Garber, Executive Director, TA)

Above all, the strategic planning session allowed TA to establish a results-based action plan which provides the framework for the Association's endeavours. Below is a brief description of that framework:

### ***Townshippers' Association Action Plan***

#### **Mission, Townshippers' Association**

1. To promote the interests of the English-speaking community in the historical Eastern Townships;
2. To strengthen the cultural identity of this community; and
3. To encourage the full participation of the English-speaking population in the community at large.

#### **Goals, Townshippers' Association**

1. Further the long-term survival of the English-speaking community, retain existing community members and attract new English-speaking individuals and families to the region;
2. Ensure that the needs of the English-speaking community are adequately met;
3. Foster community development, so that existing and future resources within the English-speaking community are maximized;
4. Ensure that the English-speaking community of the Eastern Townships continues to feel it is a valued and accepted part of the greater French-speaking community; and
5. Encourage the greater French-speaking community to value the contributions of the English-speaking community.

#### **Principles, Townshippers' Association**

1. Decisions will be based on community information obtained through needs assessments, demographic analyses, focus groups, and a variety of other knowledge gathering techniques.
2. Initiatives to be undertaken by the organisation are analysed to ensure that they address the objectives of the organisation.
3. Results of initiatives are evaluated in the context of their objectives.

#### **Five-year Objectives (2002-2006)**

1. Maintain an accurate knowledge-base of the English-speaking community in the Eastern Townships.
2. Support and showcase the English-speaking community and its heritage and culture.
3. Achieve a rate of out-migration of English-speaking young people that is equal to or less than that of French-speaking young people.
4. Act as an information and referral broker.

## **D. The Lessons Learned**

Numerous lessons were learned along the way and a few are described below:

- ✓ The strategic planning process is not always a linear process, but rather a process that integrates fundamental steps such as vision, mission, building a knowledge-base, assessing and re-orienting structure, resources, and activities.
- ✓ It is important to realize the time and support people need to accept and go through a process of change such as strategic planning.
- ✓ Having a strategic planning team to act as champions to lead the process was critical.
- ✓ Outside consultants can provide technical expertise and provide neutral support in assisting an organisation move forward in the strategic planning process.
- ✓ Become an expert about the community. Gather an in-depth understanding of data, information, resources on the community you serve and your own organisation.

- ✓ Involvement of staff is integral to ensuring commitment and participation in executing future plans.
- ✓ Have some champions that are dedicated to keep the strategic planning process going on an annual basis.
- ✓ Preparation ahead of board retreat made the session much more productive.

For more information on the Townships' Strategic Planning Process, you can contact Rachel Garber at (819)-566-5717 (toll free 1-866-566-5717) or [exedir@townshippers.qc.ca](mailto:exedir@townshippers.qc.ca).

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