



Board Bits

Strategic Planning

September 11, 2025



Your Facilitator

Desiree Tirk Trainer/Resource Developer - Leadership

- 25 years working in community development in the nonprofit and government sectors
- Experience in facilitation and training, program development, board governance, and research
- Bachelor of Indian Social Work and Bachelor of Arts in Native Studies
- Started with SARC in 2020





Who is SARC?

SARC is a nonprofit association that has over five decades of experience in supporting nonprofits in the areas of training, consulting, services, and leadership. With a membership of approximately 100 community-based organizations, we are committed to providing quality services and training opportunities to our membership and beyond.



What is SARC Learning Central?

SARC Learning Central is the hub for SARC's training and education initiatives. Programs offered through SARC Learning Central focus on strengthening an organization and the quality of services they provide.



SARC Learning Central





Treaty Acknowledgement

SARC and SARCAN Recycling would like to acknowledge that the land on which we operate our business is on Treaty 2, Treaty 4, Treaty 6, and Treaty 10 Territory.

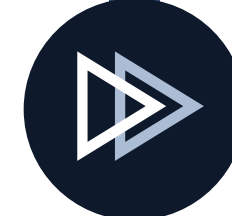


Strategic Planning

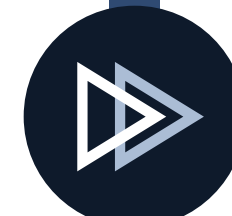


Strategic Planning

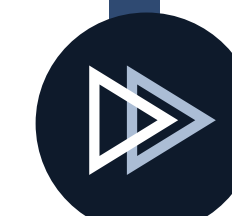
“Nonprofits with written strategic plans are:



More likely to collaborate with other nonprofits



More likely to have boards that are open to taking calculated risks



More likely to have a formal process for measuring leadership effectiveness across the organization

Yet despite this, 49% of nonprofits don't have a written strategic plan.”



- Funding for Good



What is Strategic Planning?



“An hour of planning can save you 10 hours of doing.”

- Dale Carnegie



What is Strategic Planning?



*“Strategic planning is an **ongoing process** of bringing an organization’s stakeholders together to **identify current strengths, weaknesses, opportunities, resources available, anticipate trends,** and create a plan for its future.”*

- BetterUp.com



What is Strategic Planning?



What is Strategic Planning?



Strategic Plan

- Why the organization exists
- What the organization is trying to accomplish
- Strategies to achieve goals



Operational Plan (annual plan or work plan)

- Outlines timeline, tasks, events
- Assigns responsibilities



Business Plan

- Used to test the viability of an idea
- Used to secure funding



Why Strategic Planning Matters

1. Strategic planning helps to confirm the organization's shared mission and vision
2. It creates alignment throughout the organization



Why Strategic Planning Matters

“Strategic planning enables an organization to function from a proactive place rather than a reactive one. It does this by helping us hone in on an organization’s core strategy and mission. In a time of major uncertainty, it’s more important than ever to focus on your mission and make thoughtful decisions on what efforts to prioritize.”



- BoardSource



Why Strategic Planning Matters

1. Strategic planning helps to confirm the organization's shared mission and vision
2. It creates alignment throughout the organization
3. It assures funders, donors, and volunteers that the organization is a worthy, reputable organization
4. It is an accountability tool that provides a framework for decision making



The Strategic Planning Process



Planning to plan



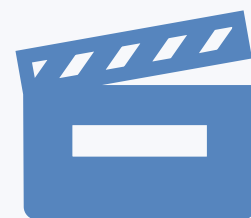
Understanding the
current landscape



Strategic visioning



Setting goals and
priorities



Creating action plans



Creating the written
document



Implementing and
monitoring progress



The Strategic Planning Process

1. Planning to Plan

- Is our organization ready for strategic planning?
- Do we have a Strategic Planning Policy?
- Who will lead the process?
- Who will be involved?
- What resources do we need?
- When is the best time to host a strategic planning session?



The Strategic Planning Process

1. Planning to Plan
2. Understanding the current landscape
 - Scan internal and external environments
 - SWOT
 - Surveys
 - Allow ample time



The Strategic Planning Process

1. Planning to Plan
2. Understanding the current landscape
3. Strategic Visioning
 - Where do we want to go?
 - What will we need?
 - Challenge the status quo



The Strategic Planning Process

1. Planning to Plan
2. Understanding the current landscape
3. Strategic Visioning
4. Setting goals and priorities
 - Setting SMART goals
 - Prioritize goals



The Strategic Planning Process

1. Planning to Plan
2. Understanding the current landscape
3. Strategic Visioning
4. Setting goals and priorities
5. Create action plans
 - Who will take the lead?
 - What resources are needed?
 - What is the timeline?
 - How will we know we are successful?



The Strategic Planning Process

1. Planning to Plan
2. Understanding the current landscape
3. Strategic Visioning
4. Setting goals and priorities
5. Create action plans
6. Creating the written strategic plan document
 - Two versions of the plan
 - Communicating the plan



The Strategic Planning Process

1. Planning to Plan
2. Understanding the current landscape
3. Strategic Visioning
4. Setting goals and priorities
5. Create action plans
6. Creating the written strategic plan document
7. Implement and monitor the progress of the plan
 - A strategic plan is only as good as its implementation



The Strategic Planning Process



“Are we referring back to the strategic plan in less formal ways, such as during board meetings, staff meetings, committee meetings, and individual performance reviews?”

- BoardSource



The Strategic Planning Process

Questions to consider:

-  Is our organization on course?
-  Are we engaging in discussion about strategic priorities?
-  Are the strategies still relevant?
-  Are there new opportunities on the horizon?
-  Is it time to develop an entirely new 3–5 year strategic plan?



Wrap Up



Any questions?

Thank you for joining us

Please complete the evaluation in the chat

We will email you the resource document(s) after the session

www.sarclearningcentral.ca