

FARMERS' MARKET STRATEGIC PLANNING

LEADER (FACILITATOR) WORKBOOK

Presented by

Alberta Farmers' Market Association

and

Alberta Agriculture and Rural Development

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**Government
of Alberta** ■

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HOW TO USE THIS WORKBOOK

This workbook was created to provide Alberta Approved Farmers' Markets with a guide and resources for developing strategic plans. Recognizing that organizations each have varying capacity, and ***not all organizations will need to use the entire workbook***, it has been divided into the following easy-to-reference sections:

SECTION I: PLANNING PROCESS

An overview of the planning process and worksheets for conducting self-facilitated planning sessions. Includes chapters on the benefits of planning, preparing to plan, and the components of a plan (assessing your environment, values, mission, vision, goals and strategies, actions, and performance measures).

SECTION II: FACILITATING YOUR GROUP

Practical tips and ideas for helping your group to dialogue and achieve a shared understanding of your intended directions.

Section I is intended to provide a quick look at the planning process from start to finish, and how the different components of planning fit together. Worksheets and examples are included for use before and during planning sessions or guided discussions. These can be printed and used by individuals to aid in reflection and preparation, or by groups to assist with self-facilitated planning sessions or group discussions.

It is also understood that while groups all have their own preferred methods of working through their conversations to reach consensus, undertaking a task as complex as planning can seem daunting at times. To provide further assistance, **Section II** contains suggestions for leading your group towards consensus.

SECTION I – PLANNING PROCESS OVERVIEW

THE BENEFITS OF PLANNING

At its most basic, strategic planning is simply a governance tool to help an organization improve by focusing energy and resources on shared goals. The process of planning is an organized group effort showing strong leadership and resulting in shared decisions and actions about the organization's reason for existence, what it does and why it does it, in response to changing surroundings and situations, and with an eye on the future.

Good planning:

- Creates a clear direction for your organization;
- Helps board, executive and staff have a shared understanding and common language;
- Can improve morale as leaders communicate their intentions for meeting their mandate to staff and volunteers and as people's efforts are recognized as contributing to the common good;
- Can be used to communicate your focus and your needs with a variety of stakeholders;
- Can measure progress and success, especially on long-term projects;
- Can assist in eliminating the need for having to make repetitive decisions;
- Is part of a cycle, taking into account busy times, funding periods, seasonal requirements, community needs, etc.
- Involves all identified stakeholders and provides them with opportunities to "own" and support the initiatives.
- Takes the capacity of the organization into consideration so that people are working within their means;
- Reflects the needs and desires of the community, and the community's realities and uniqueness; and
- Aligns with legislated or funded mandates and shows how your organization contributes to the bigger picture.

THE COMPONENTS OF STRATEGIC PLANNING

Strategic planning can be divided into the following components:

- Preparing to Plan
- Assessing your Environment
- Determining Shared Values
- Confirming Mission
- Developing A Vision
- Setting Goals and Objectives
- Establishing Actions and Setting Performance Measures
- Implementing Your Plan and Evaluating Your Progress

Each part provides the foundation for determining the next component. Completed in order, they give participants an opportunity to carefully analyze their organization and current situation before making detailed plans and using unnecessary efforts and resources. Combined, they provide an ideal means of focusing the efforts of organization members and of communicating the organization's direction to stakeholders. It is helpful to think of strategic planning as a cycle that is being continuously repeated and modified to stay up to date with changing circumstances.

PLANNING DEFINITIONS

VALUES

Values are:

- Standards or qualities that represent core beliefs or convictions.
- Used to establish priorities for decision-making and action.
- Broad statements that outline what your organization stands for.
- Phrases that mean something to your organization.
- Descriptions of how the organization goes about doing its job.
- Guides for the decisions that the organization makes.

MISSION

A mission statement:

- Describes your organization's purpose and reason for existence.
- Describes what is unique about the organization.
- Describes what you do and for whom you do it.
- Describes the value that you add to your members and to the community.
- Must be clear, concise, and easy to understand.
- Describes the function of the organization.
- Answers the question: "What business are you in?"

VISION

A vision statement is:

- A declaration of the most desired future for your organization.
- A picture that you want to create for the people you serve.
- Concrete and specific.
- Consistent with your values.
- Attainable and realistic.
- Challenging and bold – it makes you stretch!
- Not a plan.

GOALS

A goal:

- Describes what you want to accomplish.
- Can be written as an **outcome** statement (describes the product or result of the achievement of the goal).
- Defines areas of emphasis and is more specific than your vision.
- Can be internal (how you do your business) or external (what you accomplish for your member, client or customer).
- Must be tangible, measurable, and achievable.
- Is a set of aims that set the long-range direction for your organization.

Objectives:

- Break your goal or strategy into smaller, achievable units.
- Are specific and measurable levels of achievement.
- Are made within identified timeframes.

STRATEGIES AND OBJECTIVES

A strategy:

- Is your plan for achieving a goal.
- Takes your strengths and weaknesses into account and allows you to react to new opportunities.
- Is a plan for dealing with challenges faced by your organization.

ACTIONS

Actions are detailed plans and activities that will help you attain your objectives and clearly answer the following:

- What are the timeframes and deadlines associated with the strategy / objective?
- Who will champion the cause? Who is accountable for the successful completion of the strategy? Where does the buck stop?
- What human resources are needed?
- What financial resources will be allotted for the successful completion of the strategy / objective?
- Who will be involved (stakeholders, partners, assistants, outside experts or consultants, contracted parties)?
- Who will you report to? Who monitors your progress?
- How will you measure the accomplishment of the goal? How will you know you've succeeded? How will you prove what you did?



The Strategic Planning Cycle

PREPARING TO PLAN

Preparing to plan is the first crucial step and ensures that planning goes smoothly, the right people are involved, and that participants are able to make informed decisions along the way. Groups need to determine what their planning needs are first so that they can choose the required level of formality and time needed to complete the plan. This can be done by thoughtfully answering the following questions:

Why does our organization need to do planning? What are our planning requirements?

Organizations that have detailed funding requirements may need planning processes that will meet their funder's criteria. Other organizations may need to involve larger groups of stakeholders or complete preliminary work to make informed choices. Yet others may need to re-evaluate their intended plans as a result of radical changes. A short discussion at the beginning of the planning process ensures that the right amount of time is scheduled to complete the work and that participant's expectations are aligned with the organization's requirements.

Initial discussions should also include an assessment of who should be involved and their appropriate roles. Members, stakeholders and staff can be included in the process, or depending on resources an organization may choose to form a planning team who presents a draft to the Board for approval. It is important to clearly define the roles and level of participation of everyone involved to create realistic expectations and ensure that those important to the process have the opportunity to be involved.

Once planning needs and roles are identified, decide on the timing and scheduling of your strategic planning cycle. Take into account events that are critical to your organization, such as funding cycles and leadership cycles (elections). Peak work times and holiday times also need to be considered when determining appropriate scheduling to ensure participant availability. Some groups work well when they devote a full day to the planning process; other find it difficult to commit a full day, or would rather break up the session into evening work that fits better with personal schedules. All participants should be given ample time to prepare for the session and to clear their schedules.

Planning Roles & Responsibilities

ROLES

- **Board of Directors or Advisory Committee along with Sponsor**
Has overarching responsibility for planning, including the development of the process, the creation and ratification of the plan, ensuring that appropriate resources are available to achieve the plan, and communicating the plan to staff, volunteers, stakeholders, etc. Provides top-down communication, and external communication. May be responsible for enacting some of the operational components of the plan.
- **Market Manager**
Is the link between the board and staff / volunteers. Provides reports, data and insights on the operation of the market to the board so that they can make informed decisions. Provides insights on the impact of the planning directions and on available or needed resources for achieving the plan. Is responsible for enacting some of the operational components of the plan. Provides top-down and bottom-up communications.
- **Other Staff (Paid and Volunteers)**
Provide insights, when asked, regarding the current situation of the market (internally) and on client / customer feedback (externally), if that information is available. Responsible for carrying out operational components of the plan under the direction of the Market Manager. Provides bottom-up communication when asked.
- **Clients / Customers / Users of your services**
Provide input when requested through surveys, conversations, focus groups, etc.
- **Stakeholders**
Provide input when requested through surveys, conversations, focus groups, etc.
- **Facilitator**
May be asked to assist with the development and design of the planning process, and of workshop sessions aimed at completing a strategic plan. Provides process (rather than content) expertise.
- **Writing Team**
May be formed to assist the board with the development of workshop session raw data into a final, completed, easy-to-read and understand document. Must honour the group's contributions by reflecting the consensus accurately.

ROLES & RESPONSIBILITIES

When determining the best planning process for your organization, you must consider the roles of the people who will be involved in the process. Generally speaking, in Not-For-Profit or Voluntary Sector organizations, it is the Board of Directors, as stewards of the organization, who are charged with setting the framework for strategic planning, and for ratifying and evaluating the plan. In policy governing organizations, it is the Executive Director and staff (paid or volunteer) who implement the Board's policies and manage the day-to-day business of the organization. In administrative governing organizations, the Board itself may implement some of the policies and plans.

Boards of Directors often ask for staff input in contributing to or evaluating certain aspects of the strategic plan. Still other organizations may have a committee or outside contractor or facilitator to assist them with the process. If you are involving others outside the Board in your planning process or are only using a part of your Board to determine the strategic plan, be especially careful to ensure that the roles of **ALL** members in the planning process are clearly understood by all parties prior to their involvement, especially when this relates to decision-making and allocating resources.

1: PRE-PLANNING CHECKLIST AND WORKSHEET (continued)

OUR PLANNING PROCESS

PLANNING LEAD

PLANNING TEAM

WRITING TEAM

RECORDER

#	TASK	LEAD / PEOPLE INVOLVED	DATE / TIME / LOCATION	STATUS <small>Choose Complete, In Progress, Incomplete</small>
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

COMPLETION DATE

OUR PLANNING PROCESS - Timmons Ag Society

PLANNING LEAD

George Brick - President

PLANNING TEAM

George, Heather, John, Janet

WRITING TEAM

Heather, Janet & Mary

RECORDER

Mary – alternate is Heather

#	TASK	LEAD / PEOPLE INVOLVED	DATE / TIME / LOCATION	STATUS
				<small>Choose Complete, In Progress, Incomplete</small>
1	Initial Meeting: determine dates/invitation list/process	mtg Board and Executive	August 4, 7-9 pm/ Timmons Ag Hall	Complete
2	Community Input Session	Program Coordinator / Everyone & community invited	July 31 / 7 – 9 / Timmons Ag Hall	Complete
3	Mtg. for values/vision/mission	Board/Ex	August 12, 7-9 pm- Timmons Hall	Complete
4	Mtg. to develop goals	Board/Ex	August 23, 10-2 pm Timmons hall	Complete
5	Mtg. to develop action plans	Board/Ex	Aug 27 7-9 Timmons Hall	In Progress
6	Mtg. to develop perf measures	Board/Ex	Sept. 3 7-9 Timmons Hall	Incomplete
7	Work on final copy of plan	Writing team	Sept. 3 7-9 Timmons Hall	Incomplete
8	Plan ratified by Board.			Incomplete
9	Public mtg. to show & get feedback to plan	Everyone & community invited	Sept. 23 7-9 pm Timmons	Incomplete

COMPLETION DATE

OCTOBER 31

ASSESSING YOUR ENVIRONMENT

An organization's environment and outside influences have an impact on creating strategies, and understanding current issues and upcoming trends will help avoid conjecture and speculation. Some plans may not be realistic or achievable, and may even be beyond the capability of an organization to complete. Completing an appropriate assessment and allowing time for strategic thinking and dialogue will help in the strategic planning process. It also provides many insights and often participants find these group discussions enjoyable and motivating.

There are many types of assessment processes to choose from. Finding the right one for your organization may include a review of previous plans, or partially completed planning materials, or it may require new assessments. Some types of assessments are historical scans, appraisal of organizational reports and statistics, trend analysis, environmental scan, SWOT analysis, PESTO Scan, operational scan etc. Once assessments are completed, participants will find that they are ready to make decisions regarding future directions and that reaching consensus about strategic choices is easier.

The following pages contain additional information and a variety of worksheets that can be used in assessing your environment.

10 WAYS TO ASSESS YOUR ENVIRONMENT

- 1. Ask around!**
Become involved in your community and talk to people about your programs and activities.
- 2. Ask your customers!**
Talk to people as they're attending your events or activities, or have them fill out a survey.
- 3. Ask an expert!**
Different government departments or other not-for-profit groups often have speakers that can address a certain subject. Ask them to come and speak to your planning group about community demographics, trends in your region, or up-and-coming advancements in technology or other topic areas.
- 4. Go back in time!**
Do a Historical Scan. See if there's someone that can write a short history of some of the highlights of your organization or community that can be shared with you planning team and others.
- 5. Take time to complete an Environmental Scan!**
Try this with staff and volunteers as well as with board members (perhaps in separate sessions). Compare the results. There's no substitute for thoughtful and meaningful discussion – build in some time to do this well.
- 6. Ask your volunteers and staff!**
See what things are like from the pointy end of the pencil. The view is different – and perhaps there are valuable insights that will help you to make meaningful decisions.
- 7. Conduct a Focus Group!**
Invite a few people over for coffee – and ask them for their viewpoints on certain issues. The business sector is going to see things differently than the volunteer sector. Young people will see things differently than seniors.
- 8. Go to your partners!**
They're already on your side! Talk to them about their perspectives.
- 9. Use your community groups and agencies!**
Chances are there's already someone in your community that has done an assessment, analysis, scan, survey, or needs assessment. They might be happy to share their results. Collaborate and share costs to do things on a community-wide level.
- 10. Read all about it!**
Your local library has vast resources, and librarians are happy to help you find what you're looking for. They often have access to internet, or interlibrary loans, and can access sophisticated studies from university libraries or search engines. Check out the Internet for additional resources. StatsCan, Community Links and Alberta Municipal Affairs' Municipal Profiles are just three examples of online links to information.

2: PESTO SCAN WORKSHEET

HOW TO USE THE WORKSHEET

This worksheet is designed to assist your group in analyzing your environment. This tool is used so you can chat about what might be affecting your community and organization in the future and how that will impact what you plan to do now.

- **Prior to the session** use the sheet to prepare by reviewing the categories and consider their responses.
- During the session, review the worksheet with your group and allow participants an opportunity to collect their thoughts (5 – 7 items).
- Then divide participants into small groups to brainstorm their responses (10 – 15 items). Use flipcharts if you wish to track ideas.
- Reconvene back into the large group to report back and further discuss the responses if required.

Approximate Time to Complete: 1 hour (please allow yourself more time if you feel the topic areas will generate a great deal of discussion).

**In the following areas, what trends are you noticing?
What issues or challenges do you see?
What advantages or opportunities are there?
What impact might these have on your organization?**

P Political

Municipal, provincial, national, international. Political climate, shifts in thinking, changes to programs or grants, changes in administration or leadership, etc.

E Environmental

Environment, economy, education, changes in funding or spending patterns, the general economic state of the region, educational needs of staff, volunteers, stakeholders, environmental trends or potential impacts, etc.

S Social

Social trends, changing demographics, cultural trends, ways of interacting, etc.

T Technological

Trends in technology and communication, applications of technology in medicine, agriculture, communications, food processing, livestock tracing, etc.

O Other

Agriculture, media, youth, other trends.

Remember to look not only at the local picture, but to think about things on a regional, provincial, national or global level as well.

DETERMINING SHARED VALUES

Values are overarching statements of belief by which people can determine if the vision, mission, goals, actions and outcomes are right for the organization. They are beliefs, traits and / or characteristics that guide individual or group behaviours and having an understanding of the group's values is important because they are used as a set of criteria for making decisions in an organization. Values are not just ideals – they are the foundation of your organization and the reason you and others joined the organization. They can be used to develop a set of standards to which your organization adheres. While you may sometimes fall short of these standards, they encourage you to continually try harder.

3: ORGANIZATIONAL VALUES WORKSHEETS

HOW TO USE THE WORKSHEET

These worksheets are designed to assist your group in reviewing the internal workings of your organization.

- **Prior to the session** participants can use the sheet to prepare by reviewing the questions and considering their responses.
- During the session, follow the instructions below for self-facilitating a conversation about values.

This worksheet can also be used as a questionnaire with board, staff, or members to gather input on their perspectives.

Approximate Time to Complete: 1 - 2 hours

INDIVIDUAL WORK: HOW CAN I DETERMINE MY VALUES?

Please reflect on the following questions:

- Think of examples where you've seen positive standards or values in action. What impressed you about this?
- Think of times when you may have been in a situation where actions by a member of an organization did not measure up to your standards. How did you feel? What would you have changed?
- What expectations do you have of this organization?
- What expectations do you have of individuals that will volunteer or work for this organization?
- What values do you believe are important or basic to the organization? Why are these important to you?
- Which values do you feel are most important?
- How will you put these values into action?

MY VALUES:

Individual attitudes, values and beliefs:

- Become shared beliefs
- Convey organizational culture over time
- Guide individual behaviour
- Guide group behaviour
- Create understanding
- Are foundations for organizational actions
- Guide the vision of the organization

3: ORGANIZATIONAL VALUES WORKSHEETS (continued)

GROUP WORK: DEVELOPING OUR ORGANIZATION'S VALUES

STEP ONE: SHARING INDIVIDUAL VALUES

Each participant shares their list of values with the group. As participants name their values, post them on a flipchart. If there are repeats or similar values, only list them once but put a checkmark next to them each time they are mentioned to show where the group has similar thinking.

STEP TWO: DETERMINING SHARED VALUES

As a group, answer the following questions:

1. Where did we find similarities?
2. Which values do we find most meaningful for our organization? Why are they important to us? Circle the values the group finds the most meaningful.

STEP THREE: DECIDING OUR ORGANIZATION'S VALUES

As a group, answer the following question:

1. Of the circled values (the ones as a group we find most meaningful), which do we feel are the most important and will need to be developed into value statements that represent our organization?

STEP FOUR: DEVELOPING VALUE STATEMENTS

Develop your values into value statements. You can do this by writing the statements as a large group or by dividing participants into small groups and assigning each small group one or more of the statements to develop, and then sharing the results.

FORMAT: Value: We believe that....

EXAMPLES: PEOPLE: We believe that people are our most important resource.

COLLABORATION: Our organization believes in collaborating with the community and with established community groups to reach shared goals.

SUPPORTING OUR COMMUNITY: We believe in supporting our community by buying locally and promoting local organizations, services and businesses.

STEP FIVE: PUTTING VALUES INTO ACTION:

As a group, answer the following questions:

1. What exists in our organization that will support putting these values into action?
2. Where are we not implementing our values? What do we need to do differently?
3. In the daily work of our organization, how can we demonstrate that we are putting our values into action?

STEP SIX: PUTTING VALUES INTO USE

Your work with values doesn't end with the development of statements. Your values must be communicated to your staff, volunteers, members, partners, and your community. They must be put into practice. When planning, use your value statements as you develop your mission, vision, goals, and actions by asking yourselves:

1. How does what we have chosen to do support our values?

When writing your other statements, you can ask yourselves:

2. Does this statement support the values we've adopted?

DEVELOPING A VISION

A vision statement is a clear, compelling and achievable picture of the market's preferred future. It creates a longer-term, bigger picture for the organization and is typically written with a view three to five years into the future. Concrete and specific, it must be realistic, attainable, and consistent with the values of your organization. It is this view of the future that serves to give the planning its direction and inspires and motivates the people of your organization to achieve your highest potential.

4: DEVELOPING A VISION WORKSHEET

HOW TO USE THE WORKSHEET

This worksheet will help assist your group in developing a vision statement.

- Prior to the session, participants can use this worksheet to reflect on the direction that they feel is important for the organization to take.
- At a group meeting elements of the vision statement will be determined with other members of your organization.
- A final vision statement may then be completed by the group or a writing team and ratified by the Board.

This worksheet can also be used as a questionnaire with board, staff, or members to gather input on their perspectives.

Approximate Time to Complete: 1 hour or more.

INDIVIDUAL WORK: VISION QUESTIONS

Please reflect on the following questions (jot down notes on the back of the page for your convenience):

- How will the world around us be different in three to five years?
- What will be different in our world in three to five years because we exist?
- What role will our organization play in making this difference?
- How will we be recognized by others (stakeholders, funders, clients, etc.) for making a difference?
- What is the recognizable condition we hope to have in place in three to five years?

GROUP WORK: VISION ELEMENTS

Please answer the questions above as a group and discuss participant responses. Record all contributions on a flipchart. To reach consensus, answer the following question by dividing participants into small groups (2 – 4 people) and have them record their answers on cards that can be posted on a wall and sorted by similar response. Use the responses to create a draft vision statement as a group, or assign a writing team to put together a version that can be reviewed and approved by the board.

- What elements do I want to include in my organization's vision statement?

VISION CHECKLIST

- Does your statement motivate people?
- Is it easily understood and memorable?
- Does it inspire you?
- Does it make you reach?

Vision without action is called dreaming.
Action without vision is called passing time.
Vision with action can change the world.
Joel Barker, from the video: Power Of Vision

5: NEW MISSION STATEMENT CHECKLIST AND WORKSHEET

HOW TO USE THE WORKSHEET

This worksheet is designed to assist your group in writing and evaluating a new mission statement. If you have an existing mission statement, please use the previous worksheet.

- Prior to the session participants can use the sheet to prepare by reviewing the questions and considering their responses.
- During the group session, follow the instructions below for self-facilitating a conversation about values.

This worksheet can also be used as a questionnaire with board, staff, or members to gather input on their perspectives.

Approximate Time to Complete: Half an hour.

A MISSION STATEMENT SHOULD ANSWER THESE QUESTIONS:

FOR WHOM is the organization in business?

- This can describe the direct and indirect clients of the organization.
- Is your organization confined by a specific demographic or geographic location?

WHAT is the business of the organization?

- Often described in functional terms related to the needs that the organization is trying to meet.
- Describes your organization's purpose and reason for existence.

HOW does the organization fulfill its function?

- Emphasize the uniqueness and distinctiveness of this organization compared to similar organizations.
- May address in broad, overarching terms, the programs of your organization.

INDIVIDUAL WORK:

- Please reflect on the questions above and be prepared to share your answers with the other participants.

GROUP WORK:

- As a group, share your answers to the questions above and record the results on a flipchart (a bulleted list). Discuss each of the contributions and achieve consensus regarding the answers you feel are essential to your organization and will be included in your mission statement draft. Circle or check these answers.
- Using the circled answers, draft your mission statement as a group, or assign a writing team to create a draft and then bring it back to the group for ratification. If you are using a writing team, they must honour the group's contribution and reflect the shared understanding of the group. Use the checklist below (in the box) when reviewing and ratifying your final draft.

SAMPLE:

"To encourage (for whom) older adults to (what) live active lives by (how) providing a location, programs and services."
From a community social services agency

Is your mission statement simple and clear?

Does it describe: What? For whom? How?

Is it realistic?

Does it describe the uniqueness of the organization?

Does it embrace all members of the organization?

Does it provide options for growth and development?

Is it succinct?

Does it align with your objectives and bylaws?

SETTING GOALS AND OBJECTIVES

Setting goals and creating strategies go hand in hand. Goals describe what your organization wants to accomplish, and refer to the desired end results (or outcomes) that an organization wants to achieve in fulfilling its mission and moving towards its vision. Complex or long-term goals may need to be broken down into more manageable objectives. More specific than your vision, goals describe areas of emphasis and should be tangible, measurable and achievable. They can be internal (focused on how an organization does its business) or external (focused on the members, clients or customers). Think of goals as broad statements that will begin to focus your actions towards clearly defined purposes. They can answer the question, “**What** does your market want to achieve?”

6: DETERMINING GOALS WORKSHEETS

HOW TO USE THE WORKSHEET

This worksheet will help you prepare for the section on determining goals.

- Prior to the session, participants can use this worksheet to reflect on the direction that they feel is important for the organization to take.
- Break into small groups and share responses and then brainstorm
- Record results, sort into similar ideas, and decide what the overarching goal is.
- Reconvene into the large group and share results
- Write goal statements

Approximate Time to Complete: 1 hour or more, 45 minutes for small group brainstorming ideas, recording them on cards, posting and sorting them.

INDIVIDUAL WORK: GOAL QUESTIONS

Please reflect on the following questions:

- What do I think this market needs to achieve in fulfilling its mission and moving towards the vision (list these on the back of the page)?
- Of the items listed, which do I feel are essential or critical to the organization (need to have)? To my way of thinking, which are lower in priority (nice to have)?

GROUP WORK: SETTING GOALS

Because people see goals in different ways (some more practical, other more lofty or in more general terms) it is suggested that people first share the results of their individual work, and then answer the following focus question by working in small groups (2 – 4 people) to do initial brainstorming. Record the results on cards (one idea per card, written large so it can be seen when it is posted on the wall – see Section III, Facilitating Your Group). Read aloud and post the cards and then sort by similar ideas. Once the ideas are grouped together in clusters or columns decide together what is the overarching goal.

- **What does our market need to do over the next one to three years to ensure our success, fulfill our mission and move towards our vision?**

Remember, these are **ACHIEVEMENTS**, not strategies or actions. If you are focused on actions (things to do), ask yourself what the result, outcome or impact of achieving that action would be.

PROMPTING QUESTIONS:

- What change in state or condition do we want to see over the next three years? What will we see? What tangible outcome will be evident?
- What are the key areas that our society needs to focus on over the next three years to help us achieve our vision?
- Please refer to your previous assessment work for ideas.

6: DETERMINING GOALS WORKSHEETS (continued)

GROUP WORK: WRITING GOAL STATEMENTS

When goals are being named and drafted, the group may find it helpful to use the following format:

1. Review a cluster or column and identify key words or phrases.
2. Ask “What overarching achievement do these ideas point to?”
3. Identify if it is a shorter or longer term achievement (e.g.: next year, in 2 – 3 years, beyond 3 years, etc.).
4. Use the following format suggestions to prompt the writing:
 - The ABC Farmers’ Market has....which will result in.....
 - The ABC Farmers’ Market has achieved.....which has had this impact.....
 - By the year 20XX, our Farmers’ Market will have accomplished..... towards.....
5. EXAMPLES:
 - The XYZ Farmers’ Market has bylaws which align with our vision and mission.
 - The XYZ Farmers’ Market has enforceable market rules that meet the needs of all stakeholders.
 - The community is aware of and values the XYZ Farmers’ Market contributions.
 - The XYZ Farmers’ Market has increased the number of vendors in TINYTOWN and area.
 - Young people are engaged in the XYZ Farmers’ Market.
 - By 2010, the XYZ Farmers’ Market will have a full complement of board directors and committee members in order to ensure strong leadership and equitable distribution of market work.
 - Staff Development at the XYZ Farmers’ Market provides us with competent workers who provide exceptional services.

THE SMART FORMULA

S SIMPLE

Is this goal easy to understand and to communicate to others?

M MEASURABLE

Can we somehow measure our achievement? Will we know if we’re progressing or if we’ve reached our target?

A ACHIEVABLE

Is this something we’re capable of doing? Do we have the capacity to achieve this?

R REALISTIC

In light of the day-to-day work of our organization and other goals we may have identified, is it realistic to expect that we can accomplish this?

T TIMELY

Have we identified a timeframe or deadline for achieving this?

6: DETERMINING GOALS WORKSHEETS (continued)

GROUP WORK: ASSESSING YOUR GOAL STATEMENTS

Use this table to assess the quality of your goal statements, and make changes to the goal statements where required.

YES	NO	CRITERIA
		Is the goal compatible with the values and behaviours of the organization?
		Will the goal assist the organization in moving towards its vision?
		Will the work required to achieve the goal fit within our mission?
		Is the goal acceptable and understandable to the people of the organization?
		Will this goal link our present reality to the future of the organization?
		Is the goal written as an outcomes statement?

ESTABLISHING ACTIONS

Each goal must also include actions which are the detailed plans and activities for achieving the goals. Action plans need timeframes with dates set for reporting and task completion. A lead person or “champion” needs to be assigned to take responsibility for making sure actions agreed on are completed. Ensure that appropriate financial and human resources (money, manpower and time) are available to carry out the actions. Without the appropriate resources, the organization will not have the capacity to achieve the goals, and then they become mere wish-lists.

7: Action Planning Worksheet

HOW TO USE THE WORKSHEET

This worksheet and the template on the following page are designed to assist you in developing your strategies into actions.

- For each strategy, work through the questions on the worksheet below.
- Groups often find that their energy levels can be a bit low at this time, especially if participants are going through the entire planning process in one day or during a weekend retreat. Therefore, two options are given:
 - 1) Participants can discuss actions for each strategy as a group or;
 - 2) They can assign a lead person or “champion” and at least one other board member to each strategy, give them a week or so to find time to complete the template / exercise together, and then bring the results back to the board for approval.
- Insert the answers into Worksheet #11 Action Planning Template.

Approximate Time to Complete: 20 minutes per strategy

GROUP WORK: BRAINSTORMING AND PRIORITIZING YOUR GOALS

- For each goal, break down the work into smaller components or tasks.
- For each task, choose a champion who will lead the task and assume the responsibility for its completion.
- When will this task be completed? What is the deadline date?
- What human resources will be required for completion of this task?
- What financial resources will be required?
- Will other resources, such as a location, hosting requirements, etc., be required?
- How will we report this back to the larger group / committee / or board?
- Does this task fit within the reporting measures we have determined?

SETTING PERFORMANCE MEASURES

Care should be taken to ensure that accomplishment of the actions and progress towards the goal is monitored and evaluated. Good plans will include a reporting structure so that the board is kept informed of the progress and can modify the work or celebrate the success. Performance measures indicate the degree of success that an organization has in achieving its goals and actions. Typically, these measures are quantitative (that is, they can be counted or measured in terms of numbers or percentages) or qualitative (that is, they determine a change in quality or impact).

Not everything that counts can be counted. Not everything that can be counted counts.

#8: GOALS, STRATEGIES, ACTIONS AND PERFORMANCE MEASURES TEMPLATE

GOAL / OBJECTIVE:

PERFORMANCE MEASURES (Targeted)	YEAR 1	YEAR 2	YEAR 3

#	ACTIONS	TIME FRAMES	RESOURCES	CHAMPION / OTHERS WHO ARE INVOLVED	REPORTING STATUS
	Please insert your actions for this strategy here. ▼	What is your timeframe?	What resources (human, financial, other) will you need to have in place to ensure this can be accomplished?	Who is taking the lead on this initiative? Are there partners or stakeholders that need to be involved?	Choose Complete, In Progress or Incomplete
1					
2					
3					
4					
5					

GOALS, STRATEGIES, ACTIONS AND PERFORMANCE MEASURES SAMPLE

GOAL / OBJECTIVE: By 2012, the XYZ Agricultural Society will provide our community with an affordable gathering place for large events, meetings, and activities.

PERFORMANCE MEASURES (Targeted)	YEAR 1	YEAR 2	YEAR 3
Qualitative – We have more new members involved in the Ag Society due to extensive fundraising projects and because we have formed partnerships within the community to build the facility			
Quantitative: We have a new facility; We have reached our fundraising goals of 2 million dollars to complete our portion of the facility; We have received 3 grants from 3 corporations for specific parts of the project			

#	ACTIONS	TIME FRAMES	RESOURCES	CHAMPION / OTHERS WHO ARE INVOLVED	REPORTING STATUS
	Please insert your actions for this strategy here. ▼	What is your timeframe?	What resources (human, financial, other) will you need to have in place to ensure this can be accomplished?	Who is taking the lead on this initiative? Are there partners or stakeholders that need to be involved?	Choose Complete, In Progress or Incomplete
1	Get list of architects that build our type of building	By December 15, 2008	Check the internet, use staff to find reliable list, time	Staff (if available or Building Chairperson)	Complete
2	Develop terms of reference for hiring architect	By February 20, 2009	Staff/Building Committee	Building Committee Chairperson	In Progress
3	Determine Budget Costs to hire architect	By March 30, 2009	Staff/Building Committee/Finance Chairperson....time	Building Committee Chairperson	In Progress
4	Apply for funding through CIP to hire architect to develop plans	By April 1, 2009	Staff or Building Committee/Finance Chairperson....time	Building Committee/Finance Chairperson (treasurer) Will need Ag Society Chairman/Treasurer to sign forms	Incomplete
5					

MAKING IT WORK

PUTTING IT TOGETHER

Once all the components of planning are completed, the plan needs to be compiled and distributed within the organization and to key external stakeholders. Putting all the relevant points into an easy-to-read document helps planners to communicate new directions and changes, and to show ways that these changes will be accomplished. Section II includes more tips and ideas on putting your planning components together into a unified document.

THE WRITE STUFF!

Strategic plans should be presented in a form suitable for communication and distribution. They should be written in a simple style, with clear intent, so they can be easily understood and followed.

Members of the Board, Executive, and staff (paid or volunteer) should all receive copies of the plan as they are involved in making it work. To allow for easy reference, the plan may be kept in a handbook or binder at a place in the office where it can be accessed by all.

Members outside the organization (stakeholder, etc.) can be sent the plan if the Board feels it is applicable. A shorter, more concise version (perhaps a one-pager) can be drafted for use in communications with those outside your organizations, such as funders, partners, other community organizations, civic and political leaders, etc. The shorter document can also be used when you recruit new leaders, committee members or volunteers, or when you orientate new board or staff. The document can also be used as a reference when drafting marketing materials or dealing with the media.

Following are some hints when compiling your planning document:

- Having each component (mission, vision, etc.) on a separate page facilitates changes and updates to future documents, and makes it easier to photocopy sections.
- Assign a reference number to each section rather than each page in case adjustments need to be made later.
- Color coding sections may make them easier to find.
- Include a Table of Contents and a Glossary to facilitate use.

As well as the planning content, your final document may include the following, as needed:

- Signature Page – Note the date and meeting when the plan was ratified by the Board.
- Executive Summary – A BRIEF summary of the document.
- Acknowledgement or credits – don't forget to include any partners who may have assisted with printing costs, hosting input sessions, etc.
- Distribution List – A list of people who will receive a copy of the document.
- Organizational Overview – A brief overview of your organization, including location and address, names and contact information of key organization members, such as board, executive, etc., a brief history, etc.
- An appendix for budget documents, organizational charts, brochures, etc.
- Review date.

IMPLEMENTING YOUR PLAN AND EVALUATING YOUR PROGRESS

Finally, strategic plans must be implemented and continually evaluated. Many cases where plans have failed can be attributed simply to the work not being done. Often this is because the plan was unrealistic to begin with or planners did not assign tasks or provide appropriate resources. Strategic plans are “living” documents. This means they should be constantly monitored, evaluated and updated to respond to organizational or situational changes. Strategic planning does not stop once the document is completed – it continues throughout the complete cycle and then begins anew as organizations celebrate their successes, prepare for planning again, and re-assess their environment in light of their achievements and new challenges.

Monitoring and Evaluating your Progress

1. Have your monthly report at your meetings connected to your goals. Have champions or leads provide a progress report on their initiative.
2. Review your plan every 2-3 months so you have a status report of where things are at, and what may need to be revised or changed.
3. Assign tasks to people to have completed by a certain date. Follow-up on the tasks at the appropriate time. Remind people of approaching deadlines.
4. Have the board review the plan each year and identify priorities for the year based upon what was completed previously, and the resources available to you at that time.
5. Once your plan is done and you have a few moments for reflection with your executive and planning team, here are some questions you may wish to use to define where you are now, your next steps, and where you have come from. You could flip chart these.
 - Think back to what we did during this planning process, we did a lot. What did we do?
 - What worked well for you? What parts of the planning process was successful in your mind? What do you like about what we have come up with?
 - What did not work well for you? What were some of the challenges? What concerns or troubles you (either about the process or what you came up with)?
 - How will the work we have done here over the last few months help us to do a better job towards improving our organization or our community? What impact will it have?
 - What do we still have to do to ensure the process was successful or to ensure the successful implementation of our plan?

Why Plans Fail

- Successes are not celebrated.
- Not based on concrete, workable goals.
- Failure to anticipate obstacles and develop strategies.
- Lack of systematic monitoring and evaluation system.
- Lack of commitment.
- Activities treated as additions or enrichment, not as core work.
- Ongoing or operating work not included in the plan resulting in inadequate resources, poor morale, or exhausted staff or volunteers.
- Inflexible plan breaks down under stress of changing circumstances.
- Poor leadership.
- Resistance to change.

SECTION II – TIPS FOR DISCUSSION LEADERS AND FACILITATORS

- Have a set of ground rules or guiding principles to set the tone of the meeting, such as: “Everyone has wisdom; everyone will hear and be heard; there are no absolutely right or wrong answers; let’s use everyone’s wisdom to create the best results; let’s have some fun!”
- Create a welcoming environment: candies on the tables, comfortable temperature of the room, perhaps some quiet toys on the table (stress balls) so people that like to move have something to keep their attention while thinking (nothing distracting to other participants).
- Have snacks, juice, water, coffee available. Remember to make time for a “comfort break” during the meetings (smokers, washrooms, parents needing to call sitters).
- Give an overview of the process before taking the group through the detailed instructions.
- Encourage people to offer their opinions as you need everyone’s contributions.
- Make sure people feel comfortable about participating and provide them with opportunities to participate and contribute to the discussion
- Help everyone understand that brainstorming is basically trying to come up with as many ideas as possible, either individually or as a group, without making any comments on them, judging them or expanding in detail on them.
- Encourage people to be prepared! NO EXCUSES! The dog did NOT eat your homework!



- Make sure you have pens, masking tape or goop if you are using flip charts or index cards on the wall. Ask people to print large, 5-8 words per card, one idea per card, so that cards can be seen, understood and grouped.
- To discourage one person from monopolizing the conversation, you can go around the room and have each person give one idea at a time. Encourage everyone to participate.
- If emotions are high or you anticipate contention, choose a process that is more neutral (e.g.: a card process versus a dialogue).
- Check with your recorder from time to time to make sure they have the information they need and that they are able to keep up with the dialogue.
- Ensure that people have been introduced to one another. Remember to introduce special guests or facilitators. If people don’t know each other well, provide tent cards for names.
- Provide the appropriate handouts and session materials, such as reports, background information, etc.
- Remember that this is a new experience for some people. Walk them through the process ahead of time if they’re uncomfortable.
- Remember that people are spending a lot of time sitting. Build in some time for movement, or use some energy-generating activities.
- And most important, don’t forget to say.....THANKS!

Experiencing A Time Crunch?

The best thing you can do for your group is to book adequate time for your events. Even when you do, there are times groups will find themselves with too much to do and too little time. Following are a few hints for what you can do to deal with a time crunch:

- **Start on time!**
- **For groups that like to socialize, schedule a “gathering time” in advance of the session for members to catch up with one another.**
- **If you’re serving food, book time into the agenda for dishing up and cleaning up.**
- **Schedule ample time for breaks. Schedule in some “fudge” time, which is an extra minute or two on agenda items in case someone goes over the allotted time.**
- **Plan your session dates well in advance to ensure that all participants can clear their calendar for the session.**
- **If you’re putting people into small groups and shuffling them around, arrange time in the agenda to accommodate that movement.**
- **Use technology! Send out worksheets by email and allow people to share their results online or by using the “Reply to All” feature on their email. This also gives session leaders or facilitators a chance to gauge potential responses and hot spots.**
- **Form small teams of 2 – 3 people for such activities as action-planning, so that it will be easier for them to find compatible dates to meet. Teams must honour the input of the group, and should understand that they are writing drafts that can later be ratified by the group.**
- **Ensure that everyone has their preparatory materials, such as reports, agendas, and handouts well in advance of the session so they can review prior to the session and save time.**
- **Form writing groups that will put the data together to save yourself labour-intensive word-smithing.**
- **Have a flipchart reserved as a “parking lot” for issues that come up but may derail you from the agenda.**
- **Limit long-winded speakers or ask people to contribute their information in bulleted reports (preferably in advance).**



Brainstorming Process

1. Collect as many ideas as possible from all participants on a flip chart with no criticisms or judgments made while ideas are being generated.
2. All ideas are welcome, no matter how silly or far out they seem. Be creative. The more ideas the better, because at this point you don't know what might work. Go for quantity, not quality!
3. No discussion takes place during the brainstorming activity. Talking about ideas will take place once you are done.
4. Do not criticize or judge. Don't even groan, frown or laugh. All ideas are valid at this stage.
5. Build on other people's ideas.
6. Write them on a flipchart or board so the whole group can easily see them.
7. Sometimes you can ask people to brainstorm on their own first on a piece of paper if you have time, then gather them and record.
8. Set a time limit. Don't overlook the obvious.

