



St. Regis Mohawk Tribe

Tribal Meeting

Strategic Planning Presentation

December 5, 2015

Definition of Strategic Planning

- A *systematic* process through which an organization agrees on - and *builds commitment* among key stakeholders to - *priorities* that are essential to its mission and *responsive to the environment*. Strategic planning *guides the acquisition and allocation of resources* to achieve these priorities.



What Strategic Planning is Not

- Does not predict the future
 - Over time an organization must monitor changes in the environment and assess whether its assumptions remain essentially valid
- Not a substitute for judgment of leadership
 - The data analysis and decision making tools of strategic planning only support the intuition, reasoning skills and judgment of the people involved
- Rarely a smooth, predictable, linear process
 - It is a creative process that requires flexibility as you work through its various phases



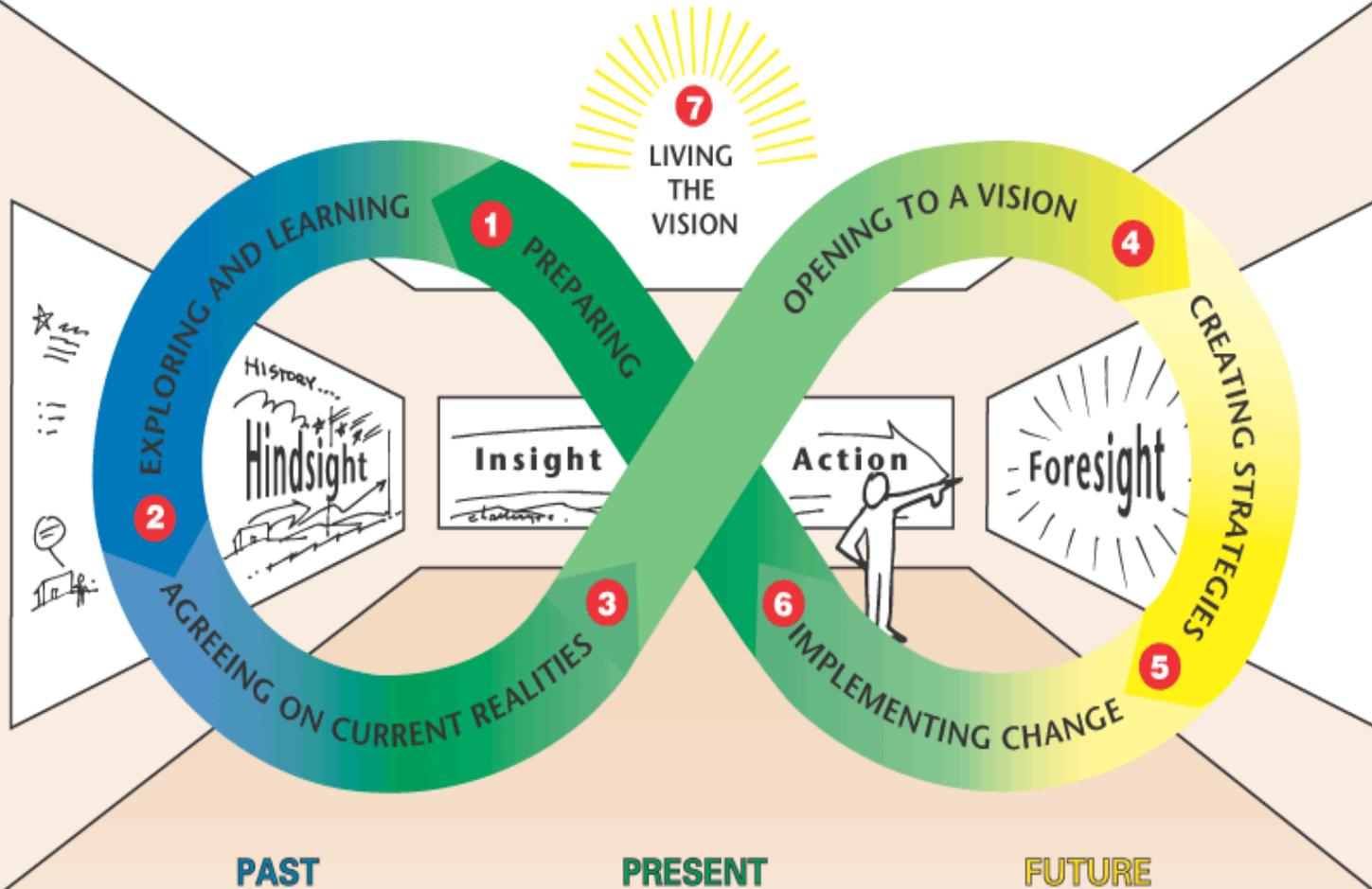


Lessons Learned

- Focus on the most important issues:
 - If you don't have any really important choices to make about your organizations future, you don't need strategic planning
- Strategic vs. Operational vs. Crisis
- Be willing to question both the 'status quo' and 'sacred cows':
 - Don't allow 'new ideas' to be characterized as inherent criticisms of the past
- Have multiple tools at the ready
- Produce a document:
 - It is a symbol of accomplishment, a guide for internal operations and a marketing tool
- Make sure its translated into annual operating plans (often described as a tactical plan)



Strategic Visioning™ Process



CURRENT SCOPE OF WORK

- Responds to the RFP ask:
 - Reflects governance, operational and community perspectives
 - Produces a unifying document that provides a solid plan for improvement and growth
 - Addresses key priorities within a 3, 5 and 10 year time frames
 - Provides a plan:
 - Aligned, attainable and measurable
 - Includes goals, objectives, strategies, actions plans and key performance indicators
 - Emphasizes and supports implementation

SCOPE OF WORK

- Work with the process/structures identified in RFP
 - Planning group
 - Division Directors
 - Others to be identified: Community, Staff
- Process designed to:
 - Build on the previous strategic planning efforts;
 - Update information to reflect the current context;
 - Focus on ensuring understanding of the relevance of the strategic planning process to ongoing work;
 - Seek input on the content of the resulting documents;
 - Enable a continuous focus on implementation; and
 - Create a sense of ownership over the results.

SCOPE OF WORK

1. Initial meetings on the process and draft overall outcomes memo to guide drafting and engagement process
2. Prepare an early draft based on the previous strategic planning materials and initial meetings (mid-December)
3. Meet to present, get input, provide training on SP implementation, on the scope of action plans for the key priority items identified in the RFP
5. Review of revised 2nd draft strategic plan (mid-January)
6. Solicit Akwesasne community input (mid-February)
7. Meet to present, edit, draft summary for public and finalize
8. Submit final document to council for approval (February/March)

Available Previous 'Tribal' Plans

Key Results Areas 2005	CCD Plan 2009
<ol style="list-style-type: none">1. Expanded/Improved Services to Community2. Model Government of Integrity3. Economic Development4. Create a Safe & Clean Environment5. Establish Sovereignty6. Community Healing & Development7. Staff Growth and Development8. Create a Strong Infrastructure9. Improve (Internal/External) Communications10. Land Claims	<ol style="list-style-type: none">1. Education2. Housing3. Employment4. Language and Culture5. Health and Social6. Governance7. Justice8. Economy9. Land Use and Environment10. Youth11. Our Elders

Writing the Strategic Plan

- Length depends on the intensity of the planning process itself (average of 3 to 40 pages).
- A strategic plan contains a combination of these elements:
 - An introduction (planning process, why doing strategic planning, how to use report)
 - Executive summary
 - Organization's profile/history (who/what you are)
 - Vision/Mission statements (where your going and why; How you'll get there)
 - Critical Strategic issues (the specific issues or choices facing the organization that need to be addressed)
 - Core Strategies/Strategic Directions (main directions, emphasis)
 - Program and Management goals and objectives (how this will be done in next 3-5 years)
 - Conclusion (thanks, what's next)



PRELIMINARY OUTLINE OF THE STRATEGIC PLAN

- Key areas of focus suggested by previous tribal strategic planning efforts and the RFP include:
 - Governance:
 - Role clarification; Governance processes; and Sovereignty.
 - Organizational Development:
 - Role clarification; Tribal system development; and Policies and procedures.
 - Program and Services improvement:
 - Goals and objectives to provide guidance for the 12+ divisions, 85 plus program areas and 700 staff.
 - Engagement and Input:
 - Community engagement; Communications strategy; and Internal input including training in strategic planning and the use of data to measure performance.
 - Sustainability:
 - Revenue generation; Economic sustainability; and Energy efficiency.

BOLD STEPS

VISION

ENABLING A
200%
EDUCATION

EFFICIENT
DEVELOPMENT
OF OUR
HUMAN
RESOURCES

FLEXIBLE
SUPPORT TO
ECONOMIC
PROSPERITY

SUPPORT
COMMUNITY
WELLNESS

MISSION

Building a Better
Tomorrow

BEST USE OF
OUR LAND
RESOURCES

6. Clarifying Roles and
addressing relationship issues

5. Strengthening Tribal systems,
policies and procedures

4. Improving community engagement

3. Focus on developing resource revenues

2. Providing quality services (e.g. housing, culture)

1. Institute Planning processes that have an impact

BOLD STEPS

SUPPORTS

CHALLENGES

VALUES

IMPLEMENTATION PLAN

- Guide to the choices for how to align with the organization's annual operating plan and budget process
- Helps identify the activities that best fit with the strategic plan and ensure successful adaptation both within the planning time frame and between each cycle of strategic planning (3, 5 and 10 years)
- Quarterly and annual monitoring and evaluation to ensure that the assumptions remain accurate, the organization still supports the strategic directions, and that that Strategic Plan is being incorporated into the day to day activities of the organization
- An implementation plan will assist with more effectively cascading goals throughout the organization
- Focus training aspects on implementation and results indicators

Involvement of Community

- To be targeted as described in the RFP (front line staff, community members, etc.)
- Utilize facilitation techniques to create more of a focus group environment and support more effective dialogue
- Focus on providing information on development of strategic plan, secure input into critical (strategic) issues, identify priorities and generate awareness/potential support of resulting strategic plan

Thank You

**Harold Tarbell – Facilitator
Tarbell Facilitation Network**

#2260 – 1959 Marine Drive

North Vancouver, BC V7P 3G1

(604) 787 – 8638

harold@tarbell.ca

www.tarbell.ca

