

Strategic and Business Planning Workshop

June 3, 2023

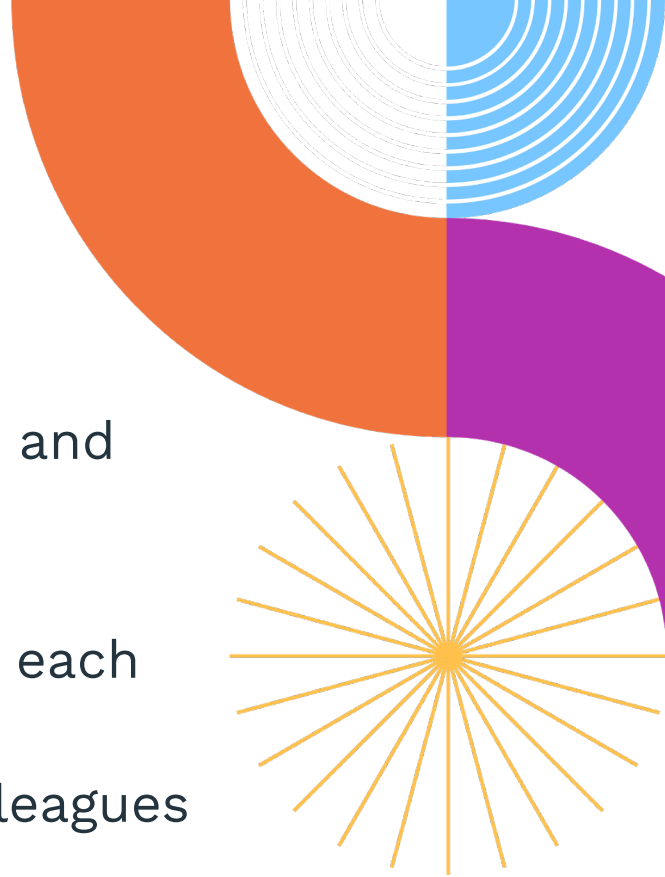


Agenda

10:00 - 10:20	Welcome & Introductions
10:20 - 10:35	Who, What, When
10:35 - 10:55	Foundational Statements
10:55 - 11:40	Building a Road Map
11:40 - 11:55	Break/Grab Lunch
11:55 - 12:30	Building a Runway
12:30 - 12:50	Q&A
12:50 - 1:00	Wrap & Closing Reflection

Objectives

- Clarity around the purpose of strategic and business planning
- Basic understanding of the process for each
- Meet and learn with and from your colleagues



Group Norms

- Take space, make space
- Stay present
- Be curious – there are no silly questions!
- Confidentiality





Strategic Planning

What is our desired future and how will we get there?

When:

- Set or affirm organization's purpose
- Clarity on how to operationalize purpose

What:

- Foundation statements (mission, vision, theory of change)
- Key goals and strategies for advancing your mission
- Roadmap for implementation

Who:

- Staff and board
- Community members
- Ongoing engagement



Business Planning

What structures, processes, and resources do I need to make an idea a reality?

When:

- New program or organization

What:

- Participant-centered design
- Mapping of how things will work

Who:

- Entrepreneur / creator
- Partners, supporters, colleagues on an ad hoc basis

Strategic v Business Planning

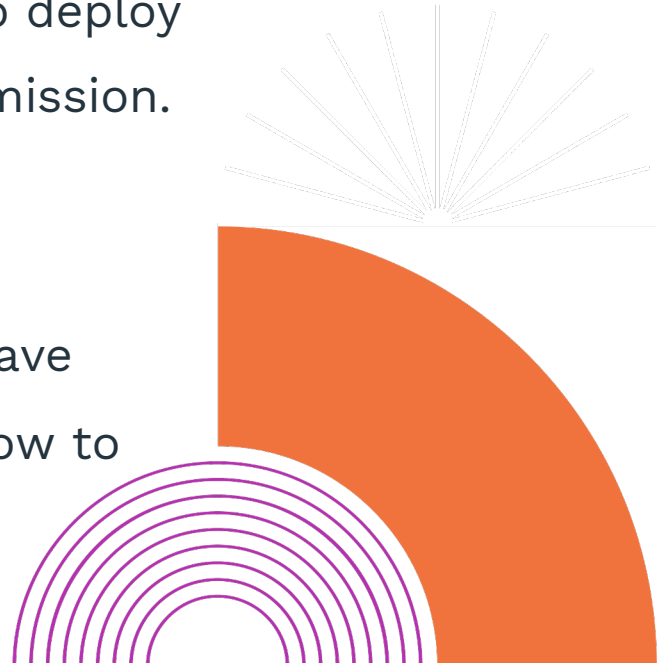
	Business Plan	Strategic Plan
Similarities	What am I trying to accomplish? What is my goal?	
Differences	What is my idea? Who is my audience? How might I best serve my audience? How might I reach my audience? What will my idea cost and how will I finance it?	What is my current reality? What are my goals and what do I need to do to achieve them? Who does what, and by when to reach my goals?

Strategic v Business Planning

	Business Plan	Strategic Plan
Similarities	Executive summary Mission, vision, theory of change Metrics / Milestones Resource needs	
Differences	Marketing channels Operating plan Staffing / Management plan High-level action plan Critical risks Statements of needs	SWOT analysis Priorities Strategies and tactics Detailed action plan

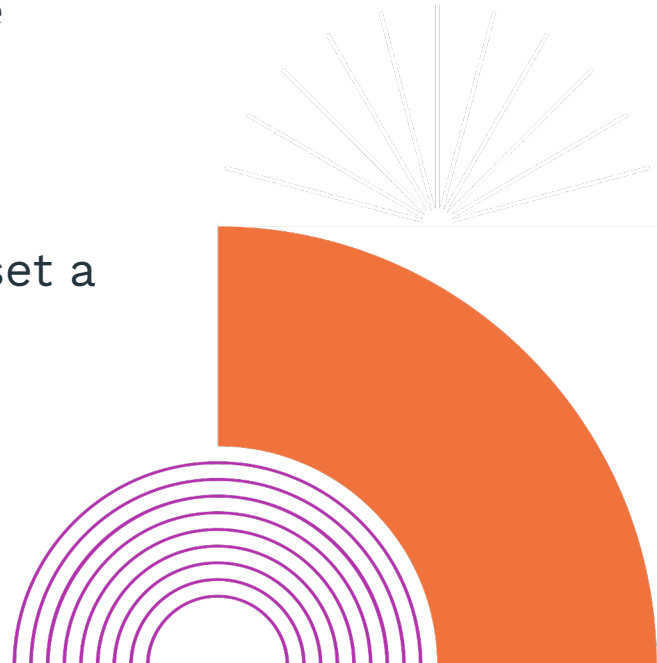
Which process?

1. Your organization has just received a large influx of funding. You're considering the best ways to deploy the money to help you operationalize your mission.
2. Your organization sees a gap in the Jewish education market and wants to fill it. You have designed a program and now want to see how to bring it to your constituents.



Which process?

1. Your organization wants to develop and integrate a revenue-generating endeavor into their core business model.
2. You're a new executive director seeking to set a new path for the organization.



Foundational Statements

- **Vision:** Desired future or end-state
- **Mission:** Unique value proposition for how we will reach the desired future
- **Theory of Change:** Visual representation / conceptual mapping of your hypothesis for reaching the desired future

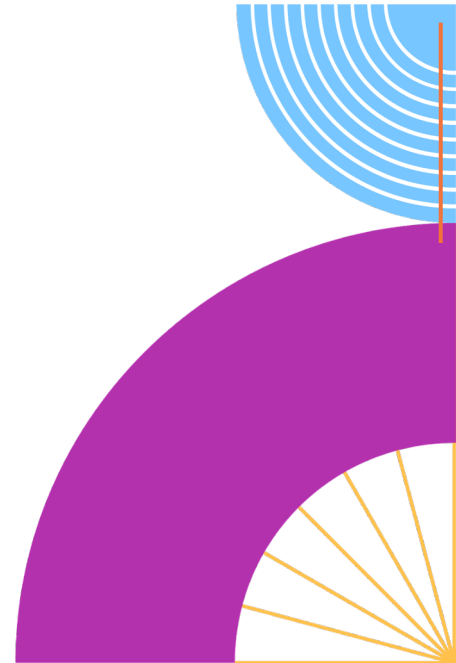


Example

Reconstructing Judaism

Vision: Diverse, connected, and engaged Judaism that meaningfully contributes to a just and compassionate world.

Mission: Reconstructing Judaism cultivates, provokes, and inspires a deeply rooted, boldly relevant, and co-created Judaism that provides individuals and communities with tools to lead lives of meaning and joy.

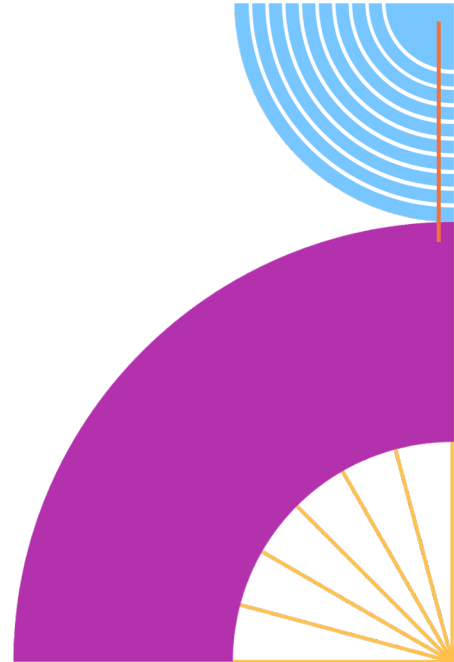


Example

Reconstructing Judaism

Vision: The diversity and vibrancy of the contemporary Jewish experience contributes to a more empathetic world.

Mission: The CJM welcomes all to explore the evolving, dynamic Jewish life of today through art, culture, and dialogue.



Strategic Planning



What is our desired future?

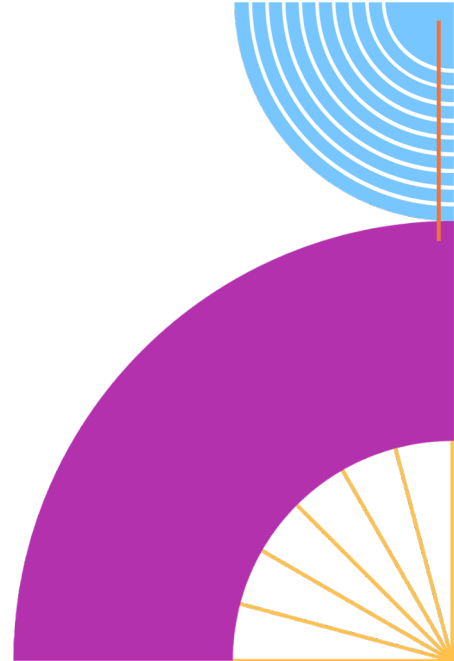
How will we bridge the gap?

What is our current state?

Goals

Key objectives you will prioritize over the course of the strategic plan timeline to advance your vision.

Three years from now, what would you hope to point to as evidence that your organization has made progress toward its vision? What do you aim to achieve as a result of your strategic plan.



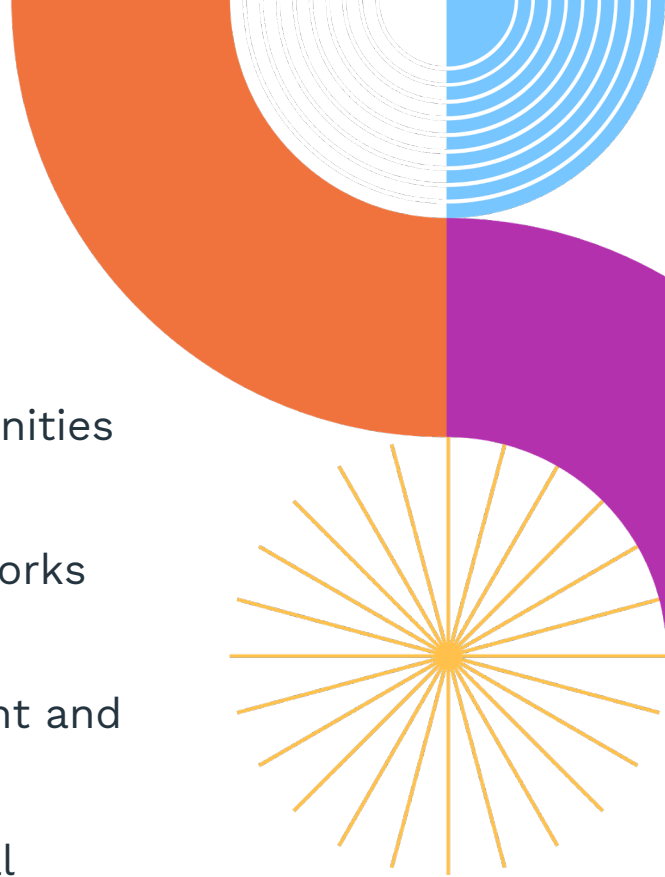
Effective Goals

Build on the organization's strengths and opportunities and address weakness or threats

Take into account the landscape the organization works within

Prioritizes addressing factors that are both important and urgent

Typically include both programmatic and operational needs





Strategies and Tactics

Strategies

The main approach the organization will take to achieve its goals

Tactics

Concrete, specific actions the organization will take, within each strategy

Example: Third Plateau

Goal 1: Become an increasingly diverse, equitable, and inclusive place to work.

Strategy 1: Diversity our team composition.

Tactic 1: Partner with an external recruitment firm to target gaps in team composition.

Strategy 2: Ensure all members of our team have a deep sense of belonging.

Tactic 1: Update our organizational values to ensure alignment with our evolving team and work.

Tactic 2: Create and execute a culture plan that clearly defines our desired culture and how we will foster this culture within a remote work environment and throughout an employee's lifecycle.





Independent Reflection



What are your organization's highest-priority goals for the immediate future?

Three years from now, what would you hope to point to as evidence that your organization has made progress toward its vision?



Breakout Groups

Introduce yourselves!

What is one three-year goal you currently have for your organization? What is one strategy you might take to get there?

What questions or challenges are you encountering as you think through how to deliver on your goal?



Avoid Collecting Dust

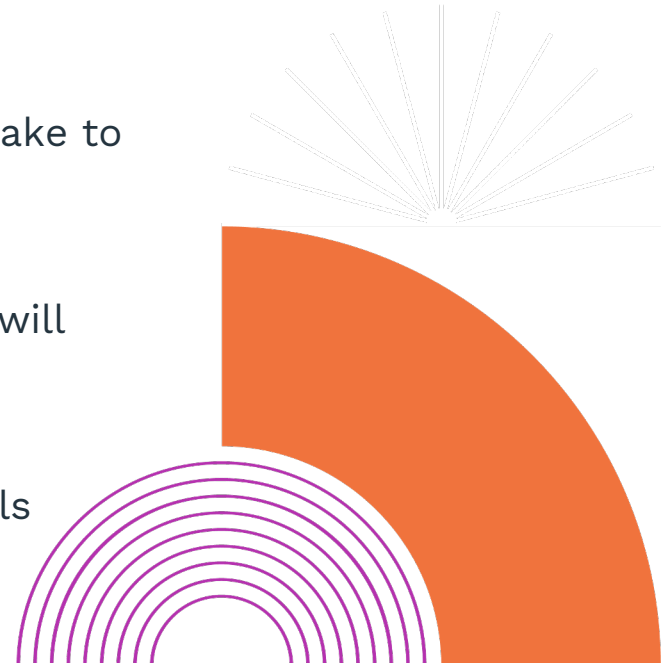
Implementation Planning

- When will we focus on or achieve each strategy?
- Who will be responsible for the work?
- What are the milestones I want to achieve in each year of my plan?
- What metrics will I use to help me track progress?
- What do I need to fulfill the strategic plan?



Recap

1. Goals: key objects you will prioritize over the course of the strategic plan
2. Strategies: the main approach the organization will take to reach its goal
3. Tactics: concrete, specific actions the organizations will take within each strategy
4. Implementation plan: actional plan for achieving goals



Break / Grab Lunch



Business Planning

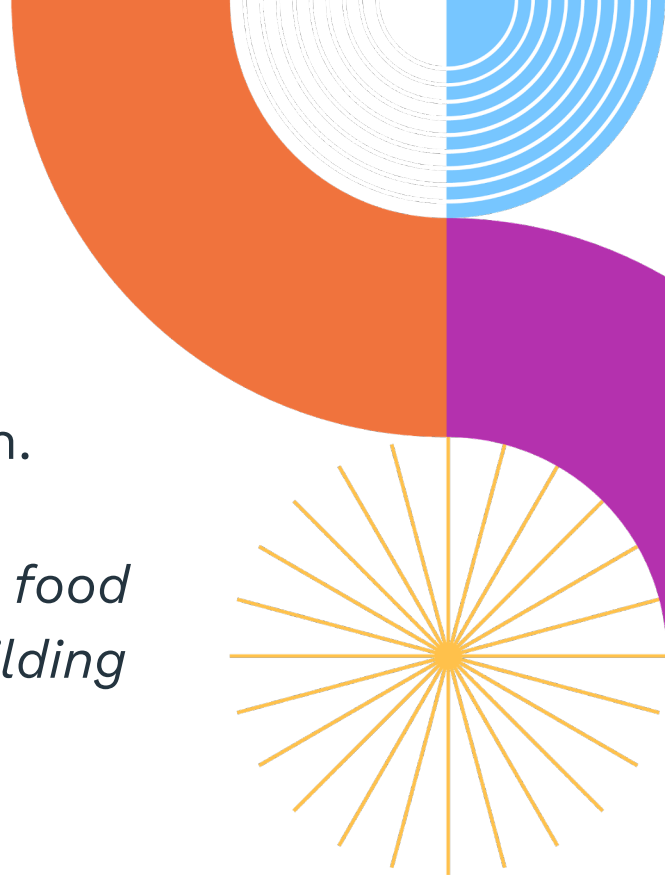
You have a dream to open Jonny K's, a sandwich shop for social good. You are figuring out how what you need to make your dream a reality.

What questions do you need to explore to help figure out if this is a good idea, and if it is, how to bring it to life?

How might we...

Turns a challenge into a solvable question.

How might we provide raise awareness of food insecurity in the community while also building revenue?



Process

Start with the problem

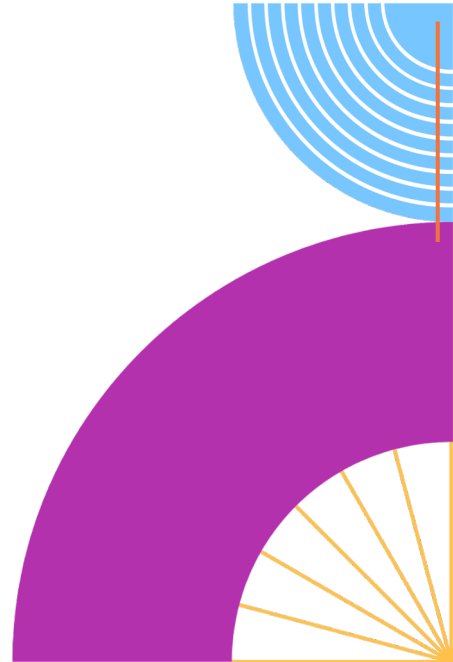
Anchor in your user / audience

Identify a solution

Learn

Ideate

Design



Breakout Groups

Problem statement: There are a lack of individuals opting to join the Jewish communal work force.

- *Who is your audience?*
- *What is your “how might we” question?*
- *What is one potential solution to solving this challenge?*
- *What would you need to know about your audience and/or the broader landscape to design the project?*
- *How will you center your user/audience in your design?*



Recap

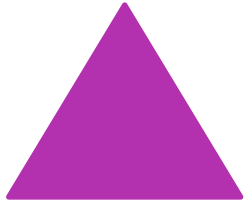
1. Understand the problem
2. Center your audience
3. Do your homework
4. Be flexible



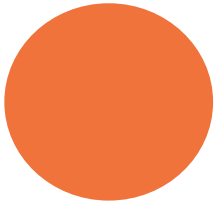


Q&A

Reflection



What are three ideas or learnings you are walking away with today?



What is circling around your head? What are you still considering?



What feels square away for you? What feels really clear?