Strategic Planning Train-the-Trainer Program
In Partnership with the
Ontario Business Area Improvement Association
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Session Speakers

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**Earl Taylor - Chair**
St. Thomas Downtown Development Board
Agenda

Introductions
Overview of Strategic Planning Train-the-Trainer Program
Strategic Planning Framework
How the program works
  • Earl Taylor, Chair
    • St Thomas Downtown Development Board
  • Linda Amour Grant, President
    • Shelburne BIA
Wrap-up
What is Strategic Planning

...a process

...a desired future

...shared goals
A Process

- Input from many individuals and many levels of the organization
- Opportunity to incorporate new ideas and approaches

*It is only as good as the creative and thoughtful insight and meaningful conversations on the participants involved.*
Strategic Plan

It is a formally written document that guides a group’s decision making process toward achieving desired goals that align with their mission and vision statements.

It also helps in allocating resources (volunteer, staff, monetary, infrastructure, etc.) and prioritizing actions.

A strategic plan is referred to for operational decisions and is updated regularly.
Train-the-Trainer Program Goals

BIAs will build their organization and community capacity by:

- Increasing the number of volunteers trained to do strategic planning
- Increasing the knowledge and leadership skills of their volunteers
- Increasing collaboration with Community Partners
- Developing a network for support
Train-the-Trainer Program Activities

Each BIA will have:

- experienced a strategic planning process
- a completed strategic plan
- Trained volunteers (Core Team) to lead and maintain the strategic plan process
Strategic Planning Framework

Stage I: Preparation

Stage II: Develop a Vision and Mission

Stage III: Collect and Analyze Information

Stage IV: Develop Goals and Action Plans

Stage V: Implement and Monitor
You can download the Strategic Planning Resource
http://www.omafra.gov.on.ca/english/rural/edr/sp/index.html
Using Data

- Informed decisions
- Competitive advantage
- Building on current information (studies, reports, research)
- Local intelligence to ground-proof the data, key stakeholder interviews
Criteria for Participation in the Train-the-Trainer Program

- Must have 5 people to take the training
- BIA must not be in a ‘crisis’
- Must have approval of BIA board
- Be prepared to engage in the strategic planning process
Core Team
Facilitators of the Strategic Planning process
Provides leadership about how the process will be delivered
Coordinates activities throughout the process

Strategic Planning Committee
A group of key stakeholders, board directors, and community partners that will provide input, develop the strategic plan and support implementation.

This group will be selected with input from the Core Team and your board.

Community Partners
Businesses and Economic development organizations, industry stakeholders who can provide information and ideas for the plan.

Your BIA
Has overarching responsibility for the process, through to the approval of the final strategic plan.

OMAFRA
Provides training and support for Core Teams and your organization through the process.
Core Team

- Prepare for training sessions
- Attend 4 training sessions (webex)
- Facilitate the strategic planning process with your Strategic Planning Committee
- Coordinate logistics for process: setting meeting dates/locations, meeting invitations/notifications, meeting notes
- Manage expectations of the process
- Ensure that it is an ‘inclusive’ process
Strategic Planning Committee

- Include representatives from businesses, industry, economic development organizations, etc.
- People who have the time, knowledge, experience
- People who will provide thoughtful and creative input into the conversations of the strategic planning process
- Make recommendations on what the strategic plan might include
- Selected with input from the Core Team and the Board
- Consider people who represent the interests of the community
- Select a Chair or Co-Chairs for the Committee
- Assign note-taker
- Determine communications strategy
Your BIA

- Board of Directors, Committees, Volunteers, Staff, Members
- **Approval** of final strategic plan
- Provide **leadership** through participation in Core Team and Strategic Planning Committee
- Provide **administrative support** (note-taker, communications, etc.)
- Provide **resources** for project (meeting space, refreshments, supplies, etc.)
- Responsible for **co-ordinating the implementation** of the plan (may continue working with the Core Team and / or Strategic Planning Committee)
Community Partners

- People representing business, industry, economic development organizations, other interested parties
- May be members of the Strategic Planning Committee, may participate in stakeholder meetings, or may provide input in other ways
- Key informants of economic development opportunities, challenges and ideas
- Will be instrumental in providing input into your strategic plan
Stakeholder Engagement

Who should be involved
• Members, funders, partners, clients, volunteers, community members
• broader community
• target audience

How to engage them
• surveys, focus groups, key informant interviews
OMAFRA

- Provide **training and resources** for Core Teams
- Provide **support** for Core Team activities
How the Train-the-Trainer Program Works

We’ll work through each Stage of the Strategic Planning process

Training Session

“Homework”

Training Session

“Homework”

Training Session

“Homework”

Training Session

“Homework”

“Homework”

After each session, each Core Team will go back to their SP Committee to facilitate the process and share the information they have worked through.

The Core Team will get input from the SP Committee and Stakeholders to build ownership.

The Core Team will also gather information and input for the next phase.
<table>
<thead>
<tr>
<th>Date</th>
<th>Project Activities</th>
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<tbody>
<tr>
<td>January 16</td>
<td>Core Team Training</td>
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<tr>
<td>3 weeks</td>
<td>Establish Strategic Planning Committees</td>
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<td>Stage I: Preparation for process</td>
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<td>February 6</td>
<td>Core Team Training</td>
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<tr>
<td>3 weeks</td>
<td>Stage II: Develop a Vision and Mission</td>
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<td>Facilitation Tips and Tricks</td>
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<tr>
<td>February 27</td>
<td>Core Team Training</td>
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<tr>
<td>3 weeks</td>
<td>Stage III: Collect &amp; Analyze Information</td>
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<td>Conducting an Environmental Scan, key stakeholder meetings</td>
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<td>Stage IV: Develop Goals and Performance Measures</td>
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<tr>
<td>March 20</td>
<td>Core Team Training</td>
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<tr>
<td>3 weeks</td>
<td>Stage IV: Develop Action Plans, finalize strategic plan</td>
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<td>Stage V: Implement and Monitor, celebrate success, start implementation</td>
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Success of our Core Team

• Teamed up with Board Executive and Board Advisors – started with 5 members.
• Met 1 hour before each webinar for dinner
• Team bought into the desire to make it work
• Each member knew the right people to setup our Strategy Planning Committee
Community Engagement & Input into the Strategic Plan

• Setup an amazing who’s who Strategic Planning Committee
• Personal request to join and help
• Met at 8 am in City Hall - sense of importance
• Email requests for reports – we are now the depository of reports
• Members freely offered input after meetings
No one is an Island unto himself
Collaboration in Action
Questions or Comments
THANK YOU!
Strategic Planning Train-the-Trainer
For More Information

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