

Ministry of Agriculture, Food and Rural Affairs

# Facilitating Strategic Planning for your Ag Society

**OAAS Convention**  
February 22, 2024

# Today's Presenters



**Carolyn Puterbough**

Economic & Business Advisor  
Community Economic Development  
Ontario Ministry of Agriculture Food and Rural Affairs



**Stephen Morris**

Team Lead  
Community Economic Development  
Ontario Ministry of Agriculture Food and Rural Affairs

# A Strategic Plan...

- Is a formally written document that **guides a group's decision-making process toward achieving desired goals**
- **Helps in allocating energy and resources and prioritizing actions.**
- **Is referred to for operational decisions**





slido

Join at  
**slido.com**  
**#OAAS24**





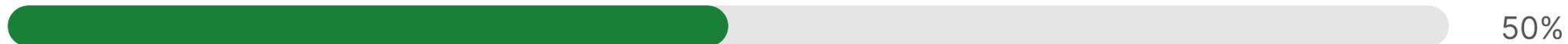
## Do you have a current strategic plan?

Multiple Choice Poll 30 votes 30 participants

Yes - 6 votes



No - 15 votes



Maybe - 9 votes



slido

Ontario

# Identifying the Need

- It is important that the group **establishes the reason for moving forward with the strategic planning process**, by answering the following questions:
  1. Why does your group need to do strategic planning? Why now?
  2. Is there commitment/approval from the Board or governing body for the planning process?
  3. Are there any issues that may affect the planning process?

# What are the Benefits?



Establish a **shared vision, mission and goals.**



Establish **clear, realistic goals and objectives** that match the group's mission and vision



Clarify or redefine your **group's role** and your target group(s)



Help board, staff and volunteers have **a shared understanding and common language**



**Gain commitment** and bring your group together to work on **common goals**



Effectively **communicate your focus and needs** with various stakeholders

# Strategic Plan vs. Constitution

## Constitution:

- ✓ Defines how you govern as a board, e.g. run meetings, set quorum, structure, by-laws, changes to same, etc.
- ✓ Applies over long-term, rarely changes.

## Strategic Plan:

- ✓ Higher level
- ✓ Plans for a specific time frame
- ✓ Sets priorities for action
- ✓ Helps to direct decision-making
- ✓ Identifies goals to achieve through an action plan
- ✓ A living document that is renewed when goals are achieved or term is up.

# Strategic Planning Framework

(as per OMAFRA's Resource guide)

- Each stage provides the foundation for the next.
- Combined, they provide a means of focusing group efforts and of communicating the group's direction.
- It is helpful to think of strategic planning as a cycle that is continuously reviewed to keep relevant in a changing environment.



# Stage I: Preparation



# Assessing the Need

## Strategic planning may be for you if your group is:

- ✓ Operating smoothly but wonders if it will continue to do so in 3 to 5 years.
- ✓ Lacks community appeal or is struggling to maintain viability.
- ✓ Has an opportunity that it is considering.
- ✓ Was originally formed to respond to a major issue which has now been addressed.
- ✓ Your group lacks a clear purpose.

## Strategic planning may NOT be appropriate if:

- ✗ There is a lack of leadership, training or skills.
- ✗ There is a lack of commitment to the process.
- ✗ The 'old guard belief' that nothing can help and nothing ever changes
- ✗ There is little likelihood of the strategic plan being used.

# Getting Ready

- Identify the Need
- Understanding the Roles
- Engagement
- Information
- Budget
- Timing

**Appendix A – Preparation Worksheet**

This worksheet is designed to assist your group in preparing for strategic planning. The first sheet is a series of questions that you can use to guide your board discussions and decision-making.

<b>PROCESS:</b> <ul style="list-style-type: none"><li>• Review and answer the following questions before you start.</li><li>• As a group, record your responses in the appropriate spot on the template.</li><li>• Refer to the worksheet on an ongoing basis to track your progress as you go through your strategic planning process.</li></ul>	<b>TIME REQUIRED:</b> Approximately 30 minutes
---	---

**QUESTIONS:**

**Identifying Need**

- Why does your group need to do strategic planning? Why now?
- Is there commitment/approval from the board or governing body for the planning process?
- Are there any issues that may affect the planning process?

**Roles**

- How many staff, board members or engaged community members will be involved on the strategic planning steering committee?
- Who will be part of the strategic planning steering committee? Do the recommended participants have the time to commit to the process?
- What is the role of each group member?
- How will you share the information from the planning sessions?
- What external support is required to help the group with the process (e.g. consultant or facilitator)?

**Stakeholder Engagement**

- Who else should be involved (e.g. sponsors, partners, clients, volunteers, community members, etc.)?
- In what way(s) do you plan to engage them as part of the process?
- Are there going to be open sessions for the broader community?
- Will there be a need to hold a session with a target audience?

**Budget**

- What is the budget for the planning process (e.g. facilitator, travel, refreshments, meeting room, supplies, and printing)?
- Do you have the required budget, or do you need to seek external funding?

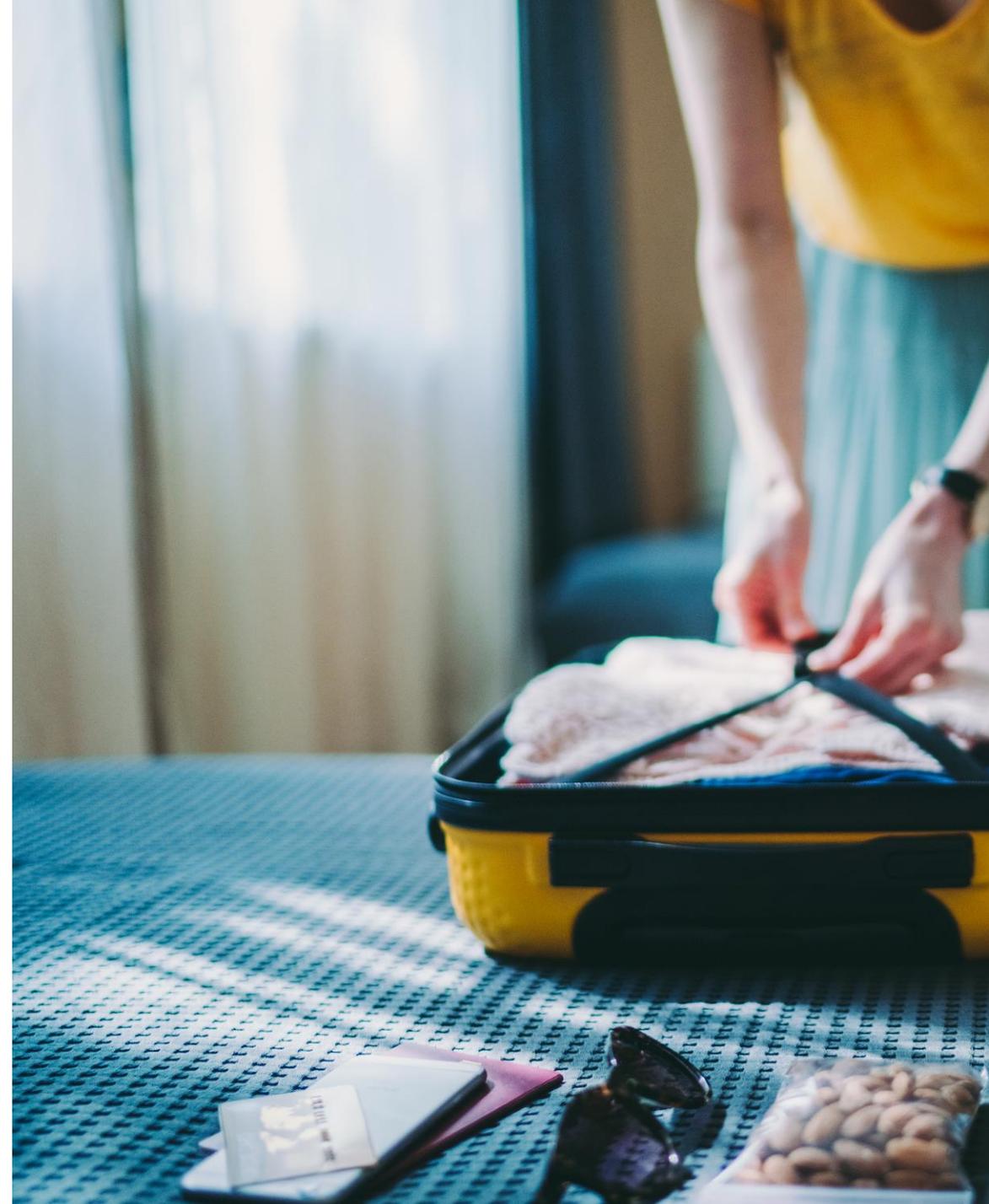
**Information**

- What information or data is available or needed to inform your planning process?

**Timing**

- How will the process be structured (e.g. a series of sessions or all day retreat)?
- How many planning meetings are needed?
- Are there any major events/activities that you need to work around (e.g. fair, AGM, election, etc.)?
- What is the target date for completion of a written plan?

A group and facilitator's resource manual



# Factors Leading to Success

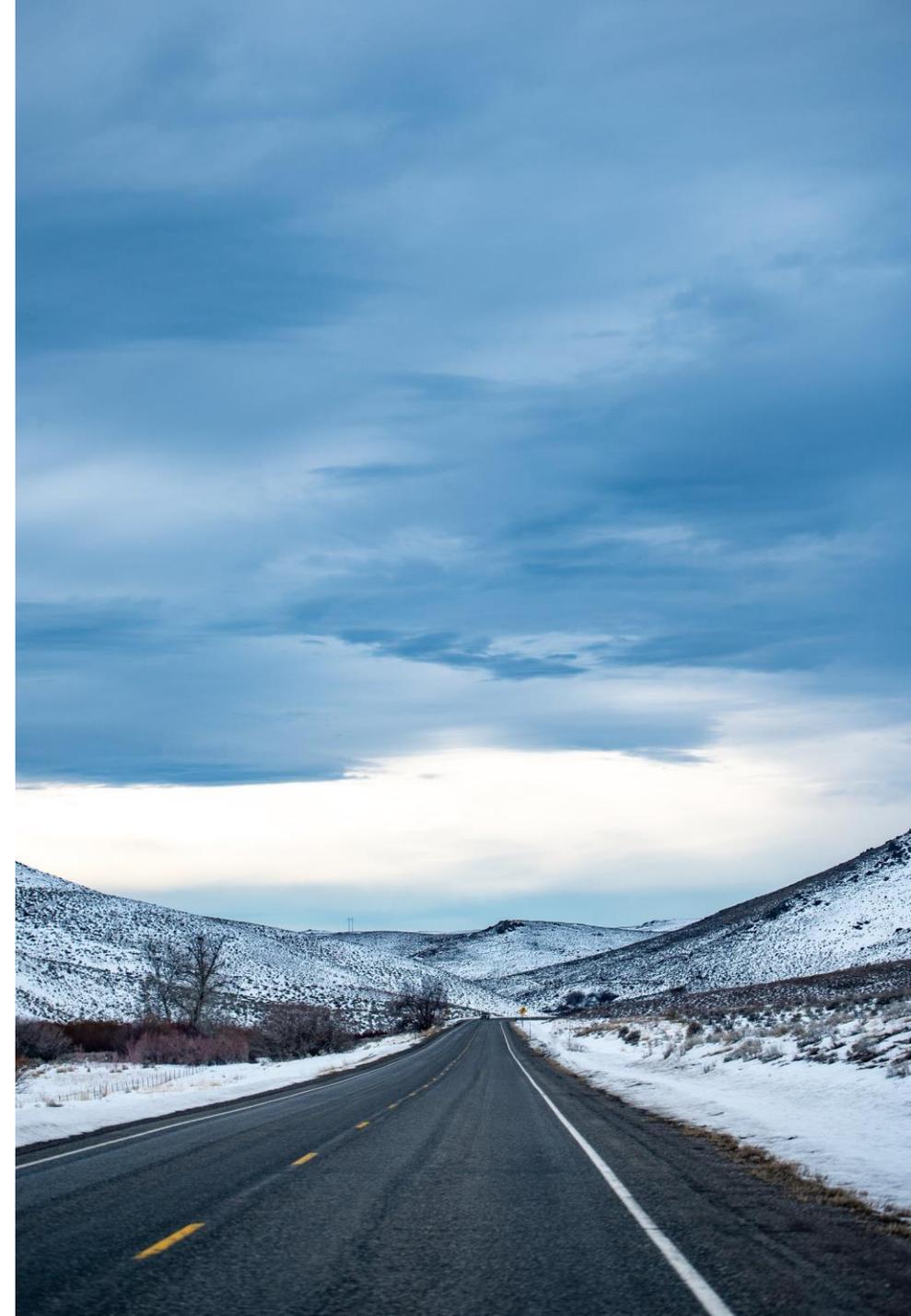
- Ensure commitment
- Strong and effective leadership
- Bottom-up approach
- Develop consistent framework and terminology

# Stage II: Develop a Vision and Mission



# Vision Statement

- A vision statement provides **direction to the group**.
- It should provide a **clear and compelling picture of the future** if the group is successful in implementing their plan.
- It can be a **desired end state** that makes sense to work toward.





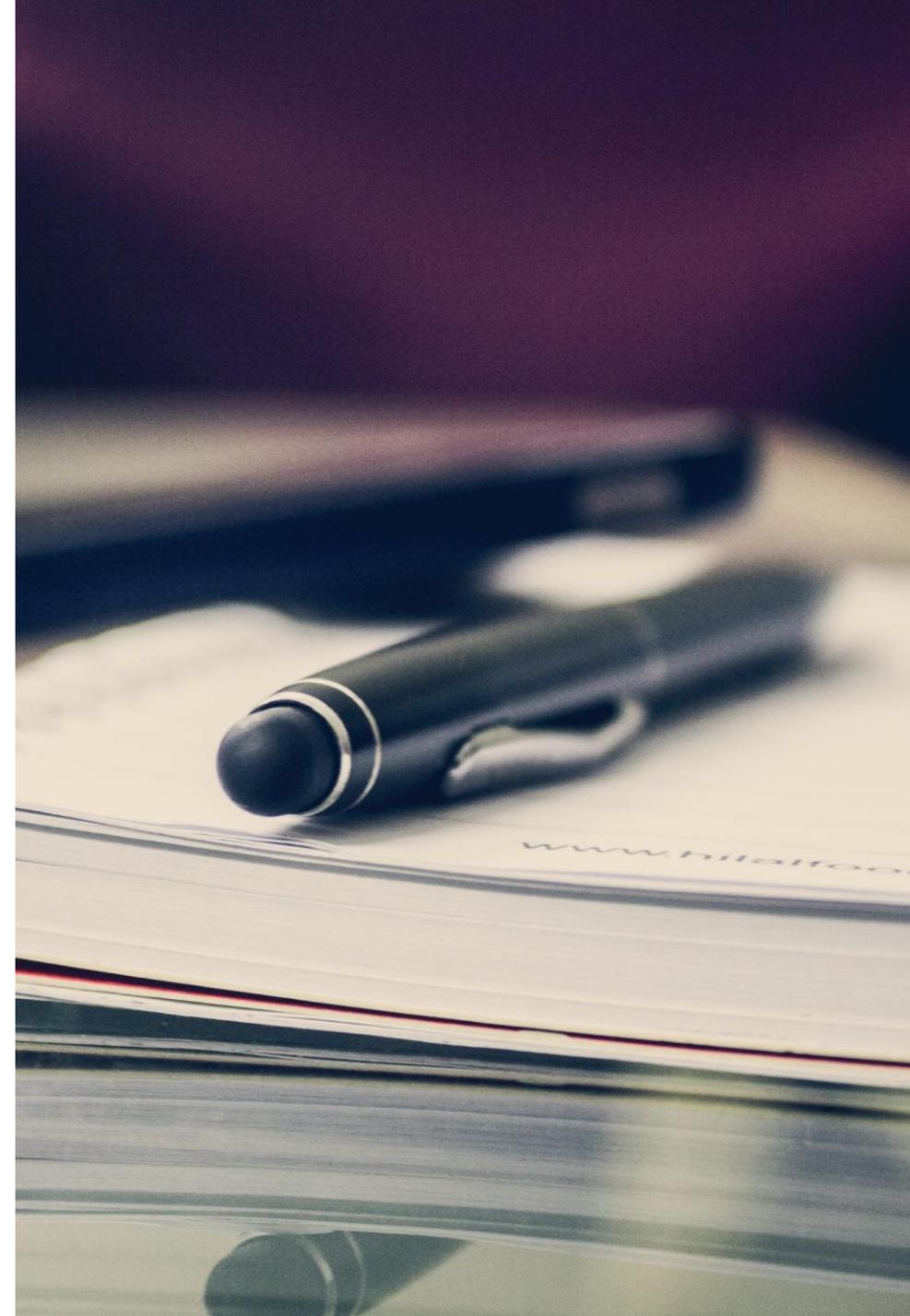
Imagine your Ag Society in 5 years. Your strategic plan has been successfully implemented. What two words would the President use in their AGM speech to describe the organization?

Wordcloud Poll  25 responses 20 participants



# Mission Statement

- A mission statement describes:
  - What the group does, and its **purpose for existence**
  - Who the group serves (i.e. membership, clients, geographic area)
  - The **function of the group**
- An effective mission statement is:
  - **Clear, concise**, and easy to understand
  - **Realistic**, and describes the uniqueness of the group



# SickKids Hospital

## Our Vision

Healthier Children. A better World.

## Our Mission

As leaders in child health, we partner locally and globally to improve the health of children through the integration of care, research, and education.

**SickKids<sup>®</sup>**

# Stage III: Collect and Analyze Information





# Name one type of data you would collect for an Ag Society Strategic Plan?

Wordcloud Poll 37 responses 24 participants



# Fergus Agricultural Society issues fall fair survey as it prepares strategic plan

Advertiser Staff | January 20, 2022 @ 8:52 am | News, Rural

Updated On January 25, 2022 @ 2:48 pm



# Conduct an Environmental Scan

**S** **Strengths** are positive internal aspects to the group that can contribute to achieving the group's vision.  
Example: We have hard working volunteers.

**W** **Weaknesses** are negative internal aspects that can hinder the group from meeting its vision.  
Example: The board is slow in making critical decisions.

**O** **Opportunities** are positive aspects, circumstances or trends external to the group with the potential to contribute to successful achievement of the vision. Example: There is a new organization that we could build a partnership with.

**T** **Threats** are negative aspects, circumstances or trends external to the group with the potential to hinder the successful realization of the vision. Examples: Aging population/declining attendance at community events.



# What is a STRENGTH for your Ag Society?

Wordcloud Poll  27 responses  15 participants



# Stage IV: Develop Goals and Action Plans



# Stage IV: Develop Goals and Action Plans



***1. Developing  
Goals and  
Objectives***



***2. Identifying  
Actions***



***3. Identifying  
Performance  
Measures***

## *What is the “CHANGE” you want to make?*

### **Example**

#### **Goal:**

Improve agricultural education opportunities for youth

#### **Objectives:**

Develop a new program by June 2025, for youth aged 12 to 18 years to learn about agriculture and local food.

Establish a partnership with a youth organization (ie/ AgScape or 4-H) by June 2026, and incorporate their programs into the new educational opportunity.

# Why Measure?

Without performance measurements there is no way to confirm whether a group is meeting their goals or if they are being effective and efficient.



# Example of Performance Measures

**Goal:** Increase the profitability of the fair event

**Objective:** Develop a sponsorship program that will attract and retain local business support

## Activities

- Develop sponsorship kit
- Develop targeted sponsorship campaign plan
- Test the package with focus group

- Produce professional quality sponsorship kit
- Deliver sponsorship campaign to target audience
- Develop a formal board-sponsor relationship policy

- Develop a recognition program
- Recognize sponsors at annual meeting
- Evaluate program effectiveness

## Performance Measures

## Methodology

## Target

Increase the number of new sponsors

Count the number of new sponsors

10 new sponsors by 2025

Increase the value of sponsorship contributions

Using the current year as a baseline, annually calculate the average sponsorship contribution.

Average sponsorship contribution increases by 15% annually.

Improve the relationship between sponsors and the organization

Survey sponsors annually to determine level of satisfaction

90% of sponsors are satisfied with their relationship with the organization

Count number of sponsors attending the annual meeting

80% of sponsors attend the annual meeting to be formally 'recognized'

# Stage V: Implement and Monitor



# Implement Your Plan

- Implementation **moves your strategic plan from a document that sits on a shelf or in a file, to actions that drive a group forward to achieve its vision.**
- Strategic plan implementation is at the heart of **how to make change happen within a group.**



# Keys to Implementation Success

- Select actions/activities that are appropriate for YOUR organization
- Set strategic goals and prioritize
- Develop realistic and attainable action plans
- Identify champions
- Allocate resources appropriately
- Monitor progress
- Adjust as necessary



# Facilitating Strategic Planning Training for Not-for-Profit Organizations

These free virtual interactive train-the-trainer sessions provide organizations with valuable skills and tools to facilitate their own strategic planning. Sessions are based on the Ministry of Agriculture, Food and Rural Affairs' **Strategic Planning Resource** manual.

## To participate organizations should:

- be willing to participate in the strategic planning process
- have commitment from the Board of Directors
- have a minimum of 3 active volunteers to commit to being trained
- not be in a crisis

## At the completion of the program, each organization will have:

- experience in facilitating the strategic planning process and volunteers trained to maintain it
- access to a support network for continued organizational development
- volunteers that have developed leadership skills

## Register Here:



For more information, contact [ag.info.omafra@ontario.ca](mailto:ag.info.omafra@ontario.ca) or call 1-877-424-1300  
In partnership between OBIAA and OMAFRA

### Session Date/Times

**Session 1 – Feb 22**  
10am-11:30am

**Session 2 – March 7**  
10am-11:30am

**Session 3 – March 21**  
10am-11:30am

**Session 4 – April 4**  
10am-11:30am

# Introduction to Strategic Planning



## Resource Manual



**Questions?**

DOWNLOAD THE OAAS



# CONVENTION APP

## Install on your mobile device:

1. On your smartphone, visit <https://my.yapp.us/JVT4AN> or use the QR code below
2. Follow the instruction on screen. (it's a quick two step process)

## Already have the Yapp App installed?

1. Tap "download existing app" or the green "+" button (top right)
2. When asked for the Yapp ID, enter **JVT4AN**
3. Press the device keyboard's enter button, or tap "Add" at top right.

<https://my.yapp.us/JVT4AN>

