



The expertise to do it right.  
The passion to see it through.



## Strategic Planning

December 6, 2016

## Objectives:

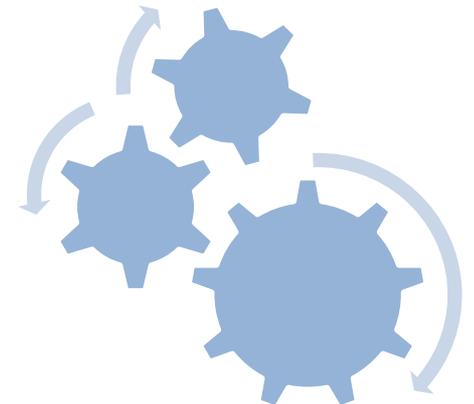
- Discuss the value of strategic planning, and key considerations before getting started
- Learn how to develop a thoughtful, authentic, and actionable strategic plan from start to finish
- Discover tips for taking your plan into implementation with an eye toward augmenting your strategy over time
- Discuss the practical application of today's content through case examples



# Strategic Planning Overview

## Common Motivators for Strategic Planning

- Change in senior leadership
- Desire for greater community impact
- Desire to shift away from a broad focus to a more targeted strategy and cohesive story
- Resource constraints – "do more with less"
- Major organizational change such as mergers/acquisitions, splits, layoffs, etc.
- Desire to strengthen competitive advantage
- Geographic expansion



# Why Plan?



## Preparing to Plan

- Affirm commitment/buy-in from upper management
- Examine your company's assets
- Leverage insights and learnings from best practices and peers
- Don't be afraid to terminate existing initiatives/operations that fall short on meeting identified needs or objectives
- Recognize that the strategic planning process takes time and flexibility.
- Involve "rising stars" within your company, or individuals from various functions



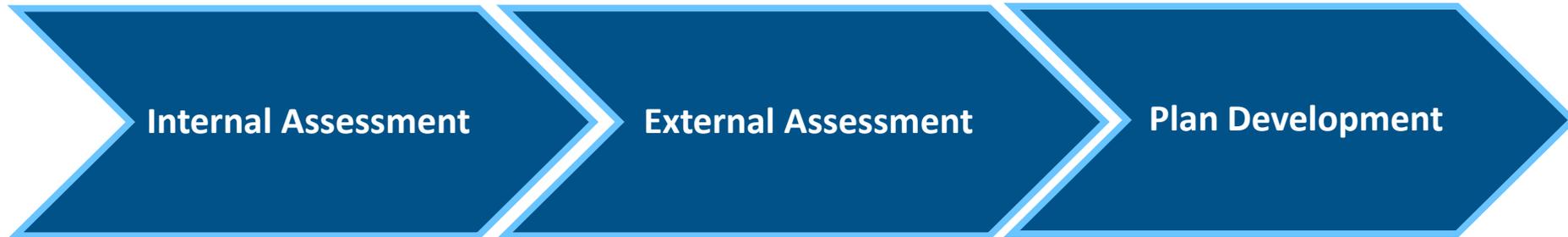
# Strategic Planning Process

## Finding the Sweet Spot

**Goal:** To create a strategic community involvement initiative that aligns with organizational priorities, meets community needs, and reflects stakeholder/employee interests.



# Strategic Planning Process



## To keep in mind throughout the process:

- Each step is essential; don't short change your efforts
- Ensure you have access to the internal and external gatekeepers and decision makers who will play an important role in helping you design and implement your plan
- This is a great opportunity for team building



# Internal Assessment

# Internal Assessment



## WHAT

A review of the company's current and historic programming, processes and policies, gleaning of stakeholders' desires for the company's community involvement efforts, and determination of business and social goals to be achieved through community involvement initiatives.

## WHY

Build a solid foundation for your strategic plan based on internal knowledge, needs, and assets, and create buy-in for a new or enhanced strategy at the onset.

## HOW

- Internal Audit
- Stakeholder interviews
- Surveys/focus groups

# Internal Audit



A thorough assessment of **company values** and **business objectives**, and **current community involvement efforts** in relation to:

## Company Information

- Business strategy and core objectives
- Culture and values
- Future vision

## Community Involvement

- Grantmaking portfolio
- Employee engagement efforts  
Policies and procedures
- Allocation of assets (cash, in-kind, employee hours)
- Results/Impact

## Tools/Resources

- Measurement tools
- Communications tools
- Staffing and operations
- Budget

# Stakeholder Interviews



Glean participants' **perspectives** and identify **opportunities**. Address key topics such as:

## Business

- Business **priorities and strategies** over the coming years
- **Challenges or opportunities** in changing community priorities/activities or adopting new ones

## Programs /Strategy

- **Affinity** toward the company's existing programs and focus areas, or **preferences** for new programs and focus areas
- **Positive or negative experiences** with current programming

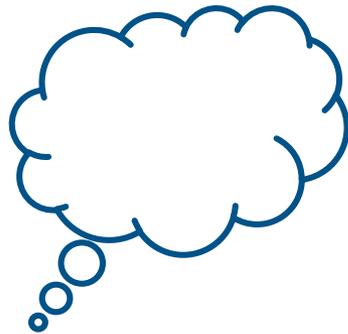
## Opinions

- **Expectations and desires** regarding programming, and social and business impact
- **Perceptions** of the company's role and responsibility as a corporate citizen
- Opinions on **peer and best-in-class** corporate community involvement efforts

## Employee Surveys/Focus Groups



Capture **feedback from employees** across different business units, divisions and geographies as well as within various positions and tenure. Uncover:



Affinity for certain **cause areas**

**Behaviors** and **preferences**

**Activities of interest**



# External Assessment

# External Assessment



## WHAT

An analysis of peer and/or best-in-class community involvement initiatives relevant to your company, as well as in-depth research into the specific needs and expectations in key operating or target communities, and cause areas where the company is best suited to have a social and business impact.

## WHY

Understand the external landscape in which your company operates to ensure your community involvement program meets the needs and expectations of the community and business objectives, and is differentiated from peers.

## HOW

- Benchmarking/Best practice research
- Community needs research
- Cause area research

## Benchmarking/Best Practice Research



**Assess how peer companies** or organizations of similar size, business model or geography **approach community involvement.** **Examine best practices** in your industry or amongst companies of similar size and/or strategic focus.

- Research:** Review peers' publicly available information and industry reports
- Interview:** Host discussions with managers of community involvement programs at peer/best-in-class companies

# Community Needs



Conduct research into **social needs and opportunities** in your company's key identified communities.

- 1 Define your community
- 2 Identify community stakeholders
- 3 Conduct research and host interviews
- 4 Narrow your focus and uncover gaps in funding

## Cause Area Research



Conduct research into targeted cause areas that **align to stakeholder interests** (internal and external) and represent the greatest opportunity for the company to **meet its business and social goals**.

Identify for each cause:

- ✓ Current trends in funding
- ✓ Gaps in support
- ✓ Intervention strategies
- ✓ Corporate funders and their roles
- ✓ Niche areas where there is differentiation
- ✓ Major nonprofits



# Plan Development

# Plan Development



## WHAT

Leverage internal and external research to design the structure of your community involvement strategy – from goals development through program design and logistical implementation.

## WHY

A necessary step in gathering all research to inform a research-driven, custom, strategic program that yields identified business and social goals.

## HOW

- Mission, objectives and outcomes
- Program/Investment design
- Potential partner identification
- Budget and operations

# Mission, Objectives and Outcomes



At the forefront of your company's community involvement is the **overarching mission** that guides activities. This is a statement that **ties together your selected cause with company objectives and assets**. When defining your mission, ask yourself:

- **WHAT** are the community needs that we wish to address?
- **WHY** are we focusing on this cause? What are the guiding values and objectives we wish to focus on?
- **HOW** will we measure success? What are the outcomes our potential partners seek to achieve?

# Program/Investment Design



Decide **where and how to invest your assets** through your community involvement strategy.

## Monetary Giving

- Grantmaking – local, national or both
- Sponsorships

## Employee Engagement

- Volunteerism (including skills-based and pro bono)
- Dollars for Doers
- Workplace giving (matching gifts, fundraising campaigns)
- Board service

## In-Kind Donations

- Products and services
- Additional assets

## Potential Partner Identification



Selecting the right nonprofit partners can be an **in-depth process** that generally is solidified during implementation of strategy, however it is helpful to begin looking at options early. Keep a record of relevant organizations uncovered throughout planning with the following information:

- Organizational mission
- Geographic reach
- Annual budget
- Target population
- Description of major programs
- Measurable outcomes
- Major corporate funders
- Volunteer opportunities
- Thought Leadership opportunities
- Marketing and communications assets

# Budget and Operations



Once decisions on strategy and focus are made, **sketch the logistics** for how your program will be implemented.

## Budget

- Current budget?
- Necessary budget?
- Case for support

## Staffing

- Current capacity?
- Necessary capacity?
- Interns/rotation of responsibilities

## Communications

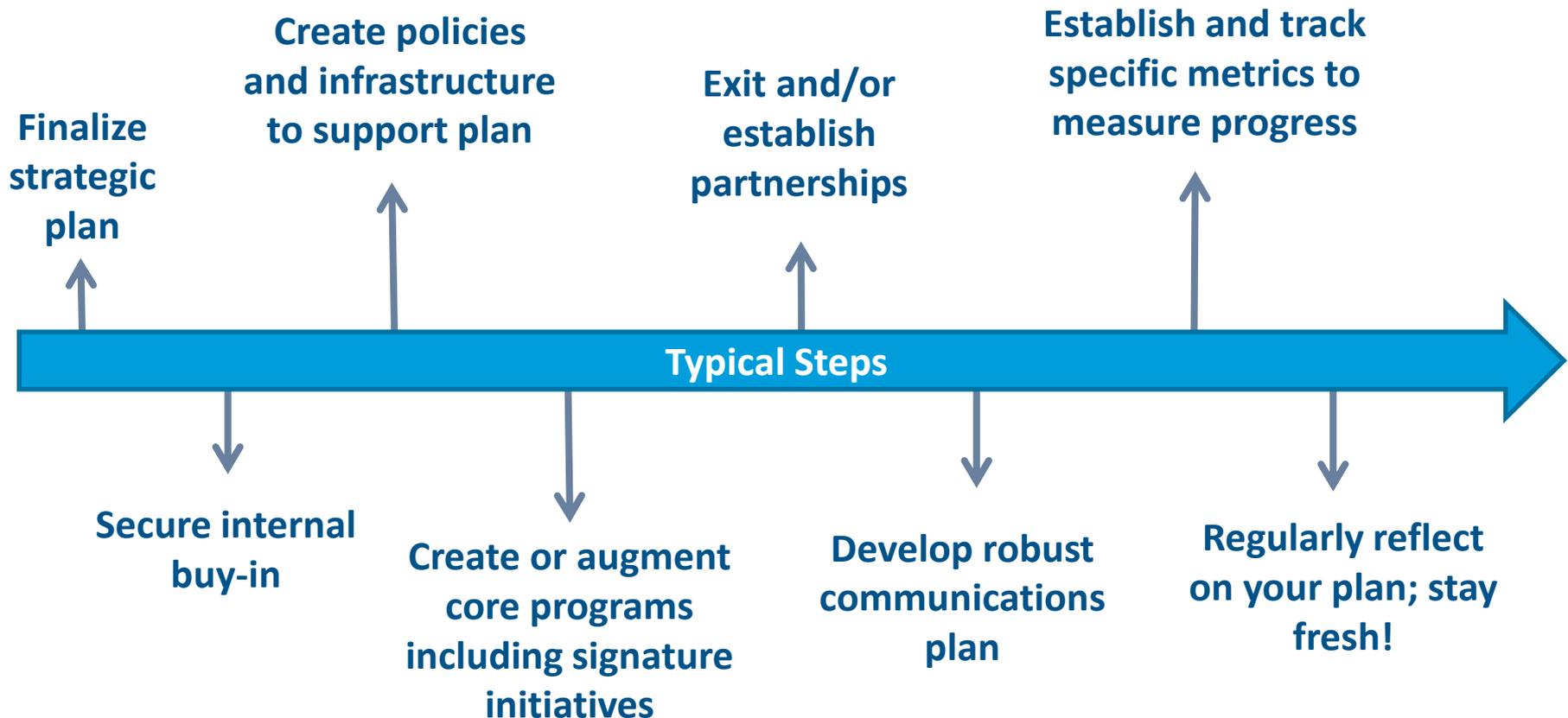
- Strategize for internal and external
- Involve communications, marketing and public relations teams



# Beyond Planning: Next Steps

## Implementation Roadmap

Executing a community involvement strategy is a journey. It may take several months or even years of implementation to achieve the goals and objectives outlined.





# Case Study

# CONOCOPHILLIPS



## BACKGROUND

- New leadership
- New headquarters
- Company split
- Low philanthropic visibility
- Desire for local and global reach

## OUR WORK

- Philanthropic audit
- Local and global signature philanthropic program design
- Partner research and selection
- Communications plan development
- Tracking and measurement

# CONOCOPHILLIPS



## HOUSTON SIGNATURE PROGRAM

### MATH EDUCATION

#### INVESTMENT STRATEGIES

##### Teachers

Professional development opportunities for Houston teachers

##### Students

Math tutoring and supplemental instruction opportunities for Houston youth



## GLOBAL SIGNATURE PROGRAM

### WATER & BIODIVERSITY STEWARDSHIP

#### INVESTMENT STRATEGIES

##### Conservation

Preserve and manage habitats in greatest need of conservation and most important to ConocoPhillips' business and communities

##### Skills Building

Strengthen individuals' and organizations' ability to manage water and biodiversity needs

##### Access to Technology

Improve research on key environmental challenges and inform effective solutions.



ConocoPhillips-Rice Model Lab



Math Teacher Of The Month



Summer M.A.T.H. Camp & Fall Tutoring Program



Smithsonian

CONSERVATION INTERNATIONAL



# ARIZONA PUBLIC SERVICE



## BACKGROUND

- Existing focus areas did not tell a clear story about the APS commitment to the community
- APS was not getting desired level of recognition for efforts
- Areas such as “Civic & Community” and “Human Service” were not easily distinguishable to stakeholders
- The number of focus areas were difficult to communicate and remember
- The strategy for the Foundation was not distinct from the strategy for Corporate Giving

# ARIZONA PUBLIC SERVICE

## APS Foundation

**STEM Programs for  
Students & Teachers**

**Historical educational  
relationships**

## APS Corporate Giving Program

### Community Vitality

Support to organizations and programs that aim to help make Arizona a great place to live and work – from the arts and local community events, to basic human needs and social service issues.

### Economic Development

Support to organizations that focus on strengthening and sustaining our communities.

### Employee Engagement

Programs that inspire, motivate and engage our employees.

## OUR WORK

- Conducted a strategic planning process and identified STEM and the environment as two top cause areas
- Desire from leadership to leverage giving to bring business to the state; conducted research to make the case that there was a need to strengthen the pipeline of talent in the state
- Developed a concrete vision for the Foundation and Corporate Giving program
- Launched new framework and signature program focused on STEM teachers



Questions?



# Thank you!

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