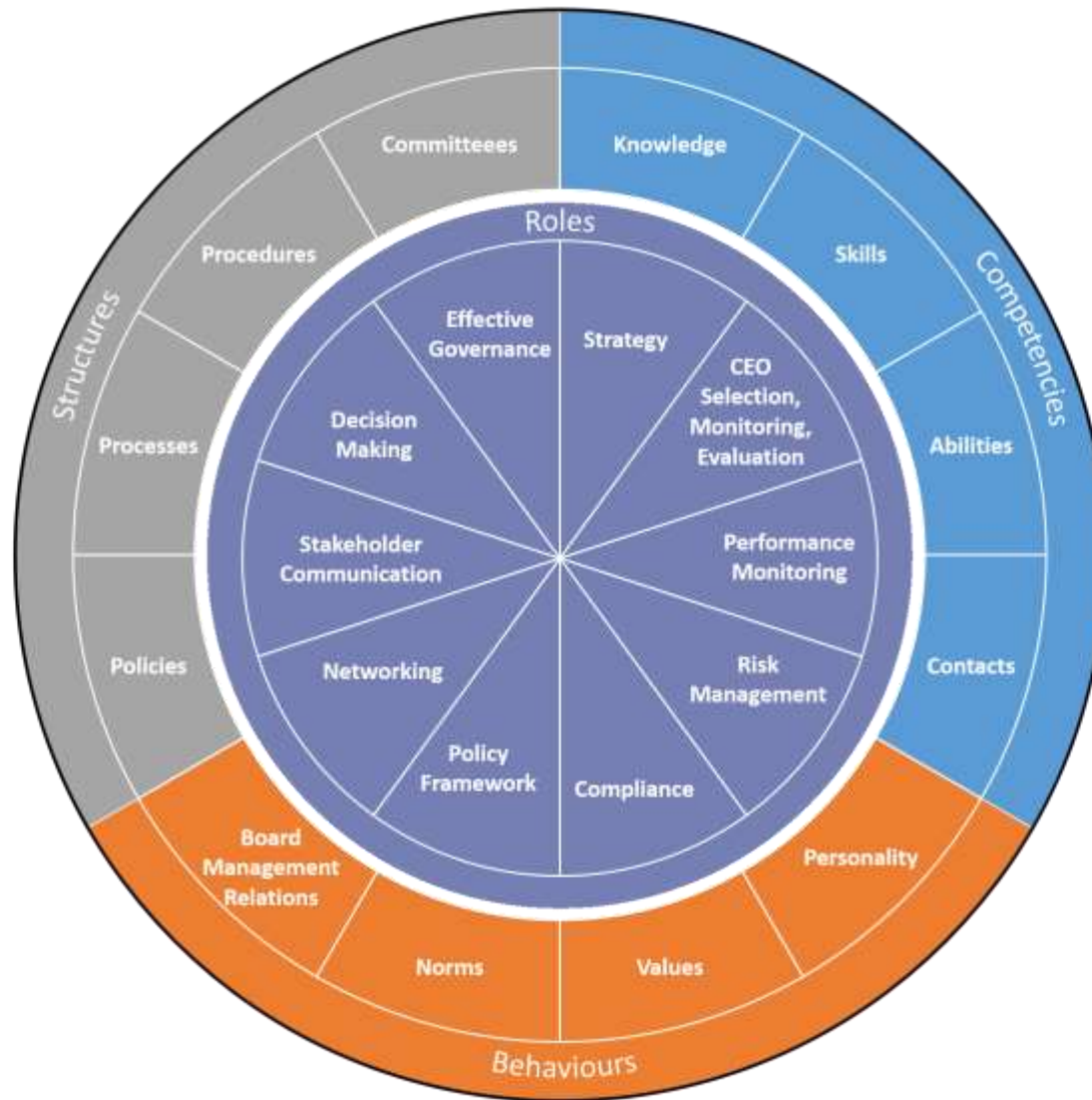


Cultivating Learning Through Strategy



Adapted from the work of Geoffrey Kiel and Gavin Nicholson

CLIENT AND STAKEHOLDER EXPECTATIONS



BOARD OF DIRECTORS

MONITORING

DECISION - MAKING

COMPLIANCE

- Legal
- Regulatory
- Bylaws & Articles
- Policies
- Contractual

PERFORMANCE

- Balanced Scorecard
 - Client
 - Stakeholders
 - People
 - Internal Systems
 - Financial
- CEO

PLANNING

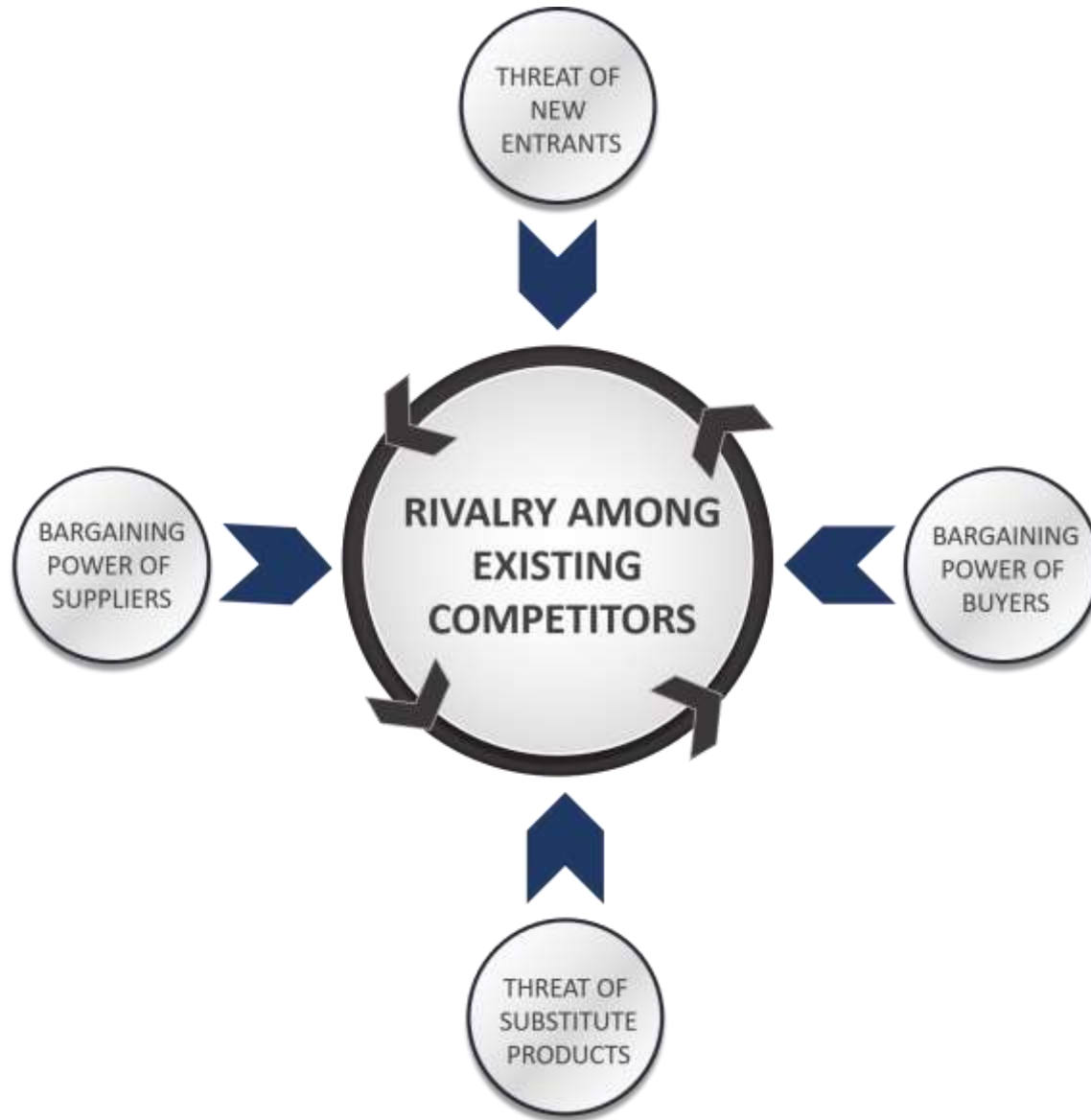
- Mission & Vision
- Strategic
- Disaster
- Succession

RESOURCING

- Annual Budget
- Capital Expenditures

“So,
what’s the
next new
thing in
strategy?”

Strategic planning is about creating the space for change, and enabling collective intelligence and wisdom to emerge



Physical Exercise Time

Sit down if your process did not meaningfully include:

- Clients
- Peer organizations (More than 5)
- Health organizations (More than 3)
- Education organizations (All the major ones)
- At least one competitor
- Knowledge broker (at least 1)
- Funders and potential funders
- Community influencers

Three core capabilities for system leaders

Ability to see the larger system.

Fostering reflection and more generative conversations.

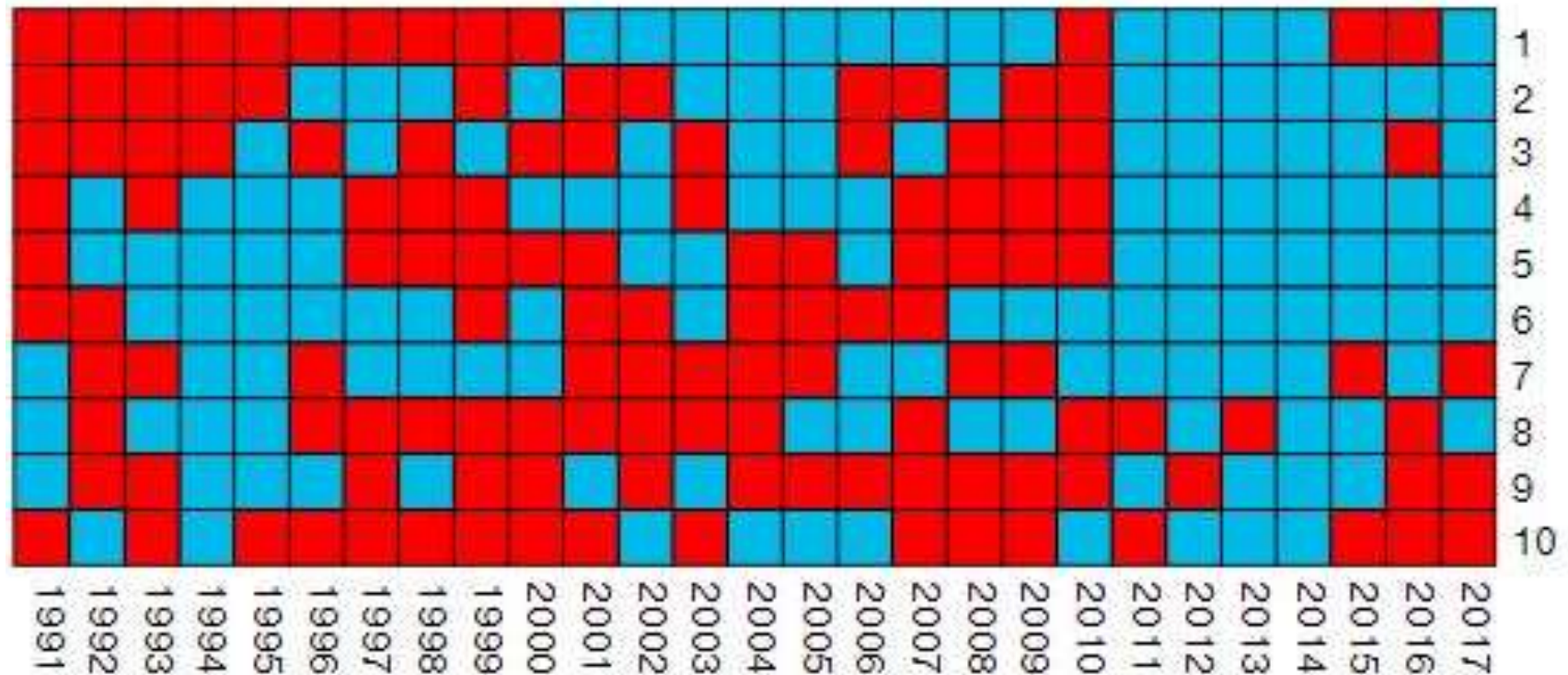
Shifting the collective focus from reactive problem solving to co-creating the future.

See the landscape



Top 10 Job-Losing Subsectors in the U.S. ¹

■ Goods ■ Services

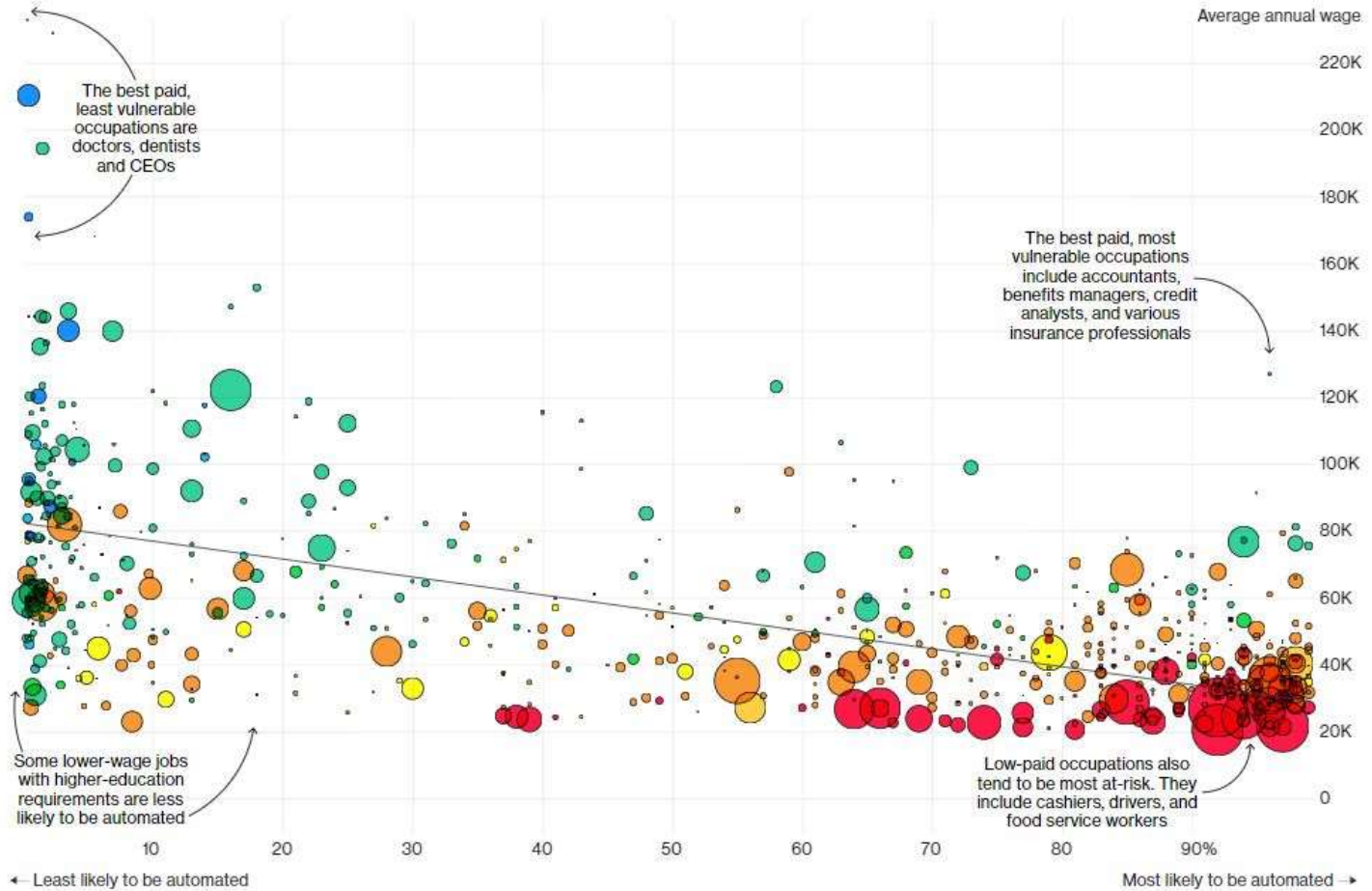


DATA: BUREAU OF LABOR STATISTICS

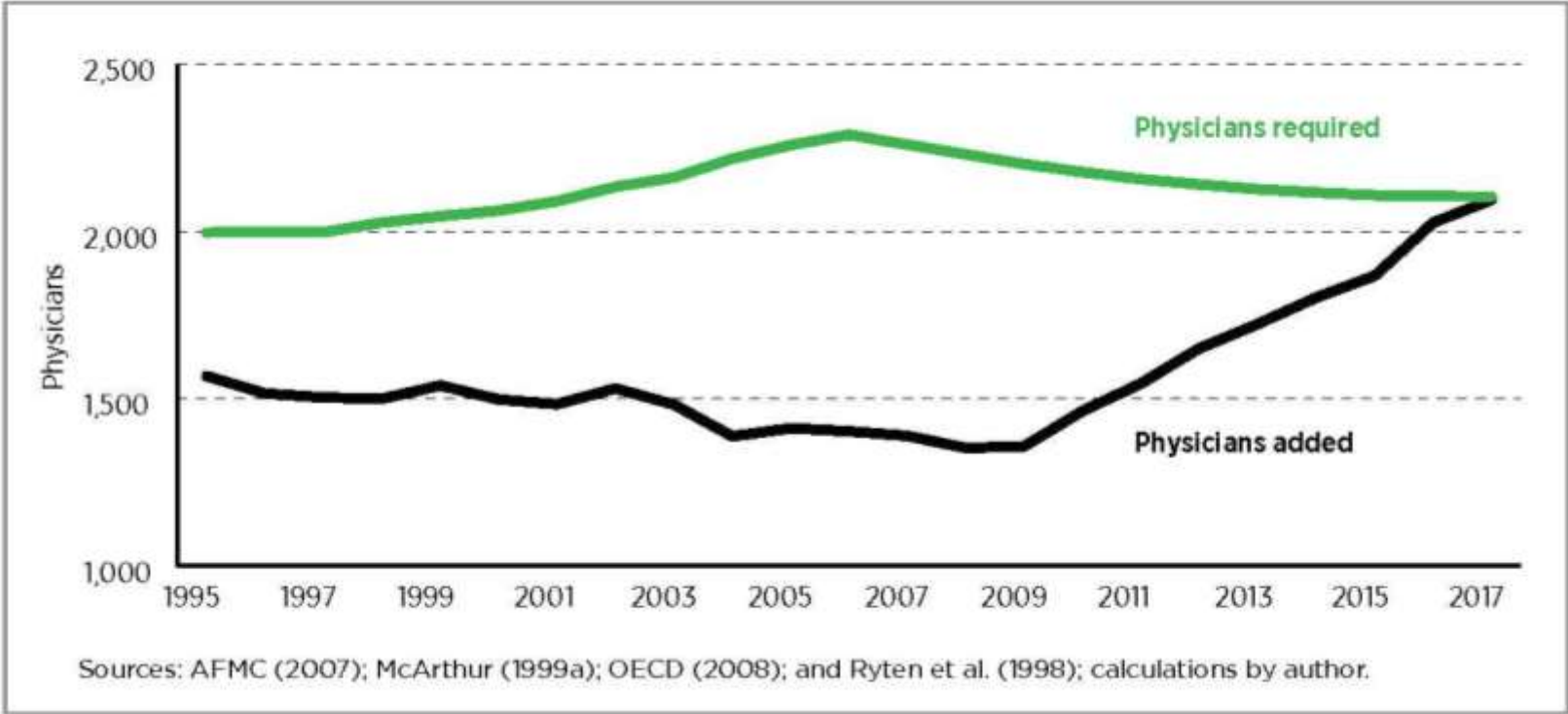
Is Your Job At Risk? ²

- Doctoral or Professional Degree
- Master's
- Bachelor's
- Associate's
- Postsecondary Nondegree Award
- Some College
- High School Diploma or Equivalent
- No Formal Education Credential

Search by occupation:



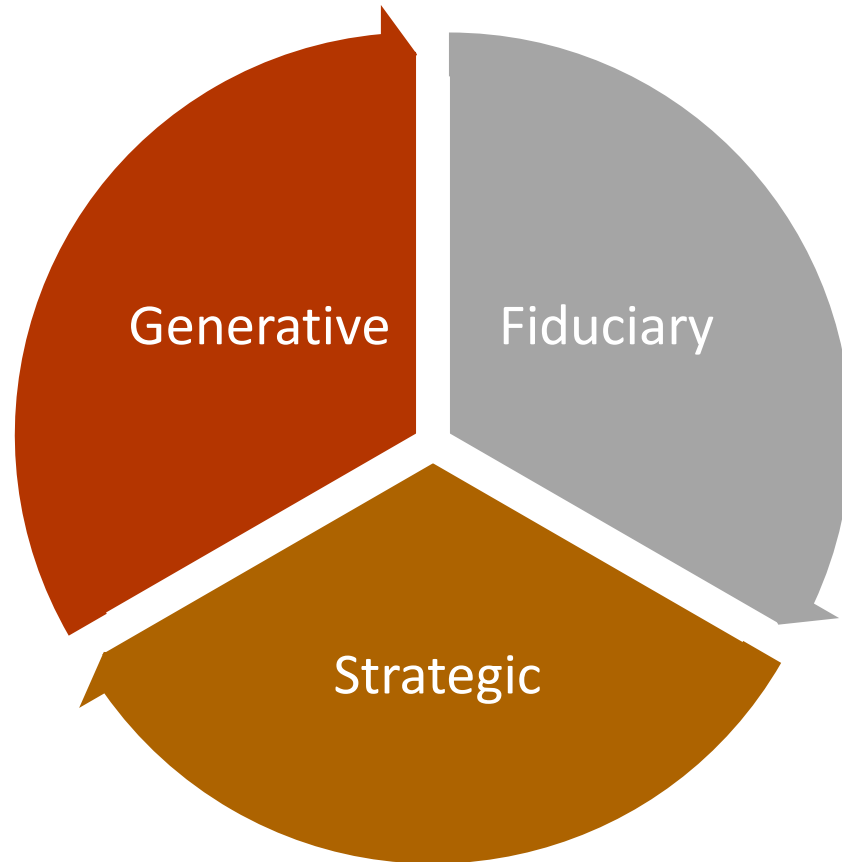
DATA: FREY & OSBORNE, BUREAU OF LABOR STATISTICS



$$\text{Value} = \frac{\text{Outcomes that matter to clients}}{\text{Costs of delivering those outcomes}}$$

Fostering reflection
& more generative
conversations

	Group Focus	Individual Focus
<p>Learning Orientation: Ability to reflect, validate and revise own assumptions and judgment</p>	<p>Generative Dialogue: Co-creating a novel or larger framework that builds upon everyone's view</p>	<p>Reflective Egalitarianism: Win-win solution that respects/keeps valued of each one</p>
<p>No Learning Orientation: Defence of own assumptions and judgments</p>	<p>False Harmony: Agreements reached via authority/force, norms, or peer pressure</p>	<p>Democratic Debate: Agreements, if any, reach via trade-offs or majority rule</p>



Co-creating the future

Three core capabilities for system leaders

Ability to see the larger system.

Fostering reflection and more generative conversations.

Shifting the collective focus from reactive problem solving to co-creating the future.