
Designing a Strategic Plan for a New Canadian Non-Profit: The Rwanda Survivors' Foundation (RSF)

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EXECUTIVE SUMMARY

“Those who cannot remember the past are condemned to repeat it”

- George Santayana

INTRODUCTION

The Rwanda Survivors Foundation (RSF), a new Canadian non-profit, has embarked on a strategic planning process to help understand the needs of their stakeholders, the issues facing the organization, and the best way to align its resources to deliver on their planned programs. The RSF is an organization focused on public education and preserving the memories of the survivors of the 1994 Rwandan genocide through print, audio, and video testimonials. They believe that by putting the survivors’ accounts of the genocide on record, they can be used as resources to develop a curriculum for Canadian high school courses in history, political science, and international relations. They also believe that educating young Canadians on issues such as genocide will help them to develop into global citizens that are aware and take action when they see atrocities committed both domestically and around the world.

In developing this strategic plan, three research questions drove the process forward with the first research question being the primary one:

- What are the most effective ways to align the strategic objectives of the organization with goals, an action plan and a timeline?
 - What is strategic planning? The term is often used a buzzword in organizations to describe a mission statement, an action plan or a set of goals but at its core, what does it really mean?
 - What are the most important elements within a strategic plan? Is a vision statement necessary in order for a plan to be strategic? Or will a mission statement combined with goals and an action plan suffice?

This report will address these questions in the context of developing the RSF’s strategic plan, and present options and recommendations for the organization to follow in order to fulfill its strategic goals.

METHODOLOGY AND METHODS

A mixed methods approach was used in the development of the strategic plan. First, a literature review was conducted on academic and peer-reviewed literature related to strategic planning approaches in nonprofit organizations. Next, a stakeholder analysis took place that identified and analyzed the level of power and interest each key player had within the RSF. Those that were identified to have the greatest power or influence over the organization were invited to participate in focus group sessions. In total, two focus group sessions were held, with eight members participating from across the organization. In parallel to this activity, an environmental scan was conducted on nonprofit organizations in Canada with a similar mission to the RSF, with six organizations found to have the greatest similarities to the RSF.

From an analysis of their publicly available information, it was found that while organizations differ in what they classify as a strategic plan, each had at minimum a mission statement. A content analysis was then conducted on the mission statements to analyze for common words or phrases used to assess if there were any revisions to make in the RSFs.

KEY FINDINGS

Through the information gathered, four major strategic issues were identified for the RSF:

- **Address Knowledge Gaps within the Membership:** One major weakness identified during the stakeholder focus group sessions was around the knowledge gaps within the volunteer-base. The stakeholders felt that the RSF lacked members who had expertise in financial management, fundraising, and public communications. By developing an approach to targeting volunteers with experience in these fields, the stakeholders felt that it would help to build a stronger organization than in the past.
- **Improve Internal Communication:** Within the stakeholder focus group sessions, one common theme discussed was improving internal communication within the organization. Although the organization is small in size (less than 50 members), some volunteers did not have a full understanding the future goals of the RSF. The strategic planning literature echoed a similar argument in having effective communication with members in order to ensure that there is a good understanding of the vision and mission of the organization.
- **Develop a Fundraising Strategy:** Related to the need to recruit members with a background in fundraising, to enhance the scope of their work, it was found that the RSF should develop a formal fundraising strategy and find people with this skill base.
- **Increase the RSF's Visibility and Capacity for Knowledge Dissemination:** by partnering with secondary and post-secondary institutions across Ontario, as well as with organizations such as the Canadian Museum for Human Rights (CMHR), the RSF will be able to encourage research on genocide and share information and resources with various groups.

OPTIONS TO CONSIDER AND RECOMMENDATIONS

This report has presented the RSF with three options, which are summarized below:

1) **Option One: Maintain Current Status**

This first option presented is to maintain the status quo for the time being. The RSF does not currently operate under a strategic plan and it is still able to meet the current needs of its stakeholders. While adopting a strategic plan can formalize the actions of the organization and lead to a clear plan of action to fulfill its mission, it is not necessarily a precondition for an organization to succeed. As the environmental scan found, there are

many nonprofits in Canada with similar missions to the RSF that are able to meet their strategic goals without a formal plan in place.

2) Option Two: Adopt the Strategic Plan Presented in the Report

The second option proposed is to adopt the strategic plan presented in this report. The plan provides recommendations for goals, objectives and strategies based on findings from the literature review, focus group findings, and an environmental scan. A vision statement and revised mission statement are also presented.

3) Option Three: Consult with Stakeholders on the Strategies and Revise Plan

Since the initial focus group sessions, there may have been changes in ideas that stakeholders had for the direction that the RSF should take. While there has been discussion with the RSF founders to ensure that the plan presented above is still relevant, it could be beneficial to present the plan to the RSF's stakeholders in order to ensure that the strategic issues identified were formulated into strategies that are realistic for the organization to implement. Once the plan is revised, Board Members could pass the plan at their next meeting or at the 2016 RSF Annual General Meeting.

Recommendation

Based on the options presented above, the recommendation with the greatest likelihood for success is Option Three. Stakeholders should review the strategies and action plan presented in this report and offer any suggestions or makes revisions to ensure that it has "buy-in" from all members of the organization. This course of action would help to ensure that stakeholders continue to be engaged in the process, and that a realistic implementation strategy is used for the plan.

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1.0 INTRODUCTION

This report discusses the strategic planning process for the Rwanda Survivors Foundation (RSF), which is a non-profit organization based in Toronto. This organization aims to educate the public about the 1994 Rwandan genocide and to facilitate in the memory preservation process for genocide survivors. To understand the vision of the organization and the subsequent chapters that discuss the plan, this chapter provides information not only on the RSF, but also offers a brief background on the Rwandan genocide and the demand that has been presented post-genocide for memory preservation and awareness.

1.1 DEFINING THE PROBLEM

Non-profit organizations provide real social and economic value to the Canadian public, “tackling social issues; delivering health care and higher education; supporting arts and culture; and providing sports leagues and recreational facilities for Canadians and their children” (Emmett, 2013, par 1). While some nonprofits in Canada are funded through government and private grants, many rely at least in some part on fundraising activities and donations from Canadians. Based on information gathered by the Fraser Institute from the 2013 Canada Income Tax returns, a trend has emerged in recent years to suggest that Canadians have been donating less to charities, and that those who have donated contributed less as a percentage of their annual income than in the past (Fraser Research Bulletin, Dec 2015, p.1). This declining trend could be attributed to several external factors, but there are clear patterns to suggest that the Canadian economy has played a role in this, with studies demonstrating that charitable donations decrease when disposable income has been negatively impacted or reduced (Francis and Clemens, Fraser Forum, 1999, par.15).

In the face of these challenges, many nonprofits have had to make tough decisions such as scaling back on programs and services, restructuring their organization, or laying off its staff. The RSF, founded in 2012, is a Canadian nonprofit that has struggled with these issues, as their need to deliver programs and services is limited to the start-up resources and time provided by its founders. Early on, the RSF founders began to lay the foundation for several of its low cost initiatives such as meeting with teachers in the Toronto District School Board (TDSB) and discussing opportunities for collaboration with memorial groups in Rwanda. While this has helped the organization to operate while maintaining efficiency, working on several initiatives without a well-defined plan on how they are integrated or work together or without consultations with stakeholders has likely led to ideas that were lost or not prioritized.

The RSF currently does not have a formal strategic plan in place, and instead the founders drive initiatives regarding education and research forward, while volunteers work on fundraising and event promotion. By undertaking a strategic planning process, it is hoped that the organization will be able to address three of the following major problems that they currently face:

- **The creation of a strategic plan can help to create alignment between the RSF’s programs and their mission.**
 - By taking the time to critically analyze the programs and services offered, review the external threats and internal weaknesses that may be present, the founders and

board members will be able to critically assess where their organization is, and where they want it to go. By undergoing this process, they can be in a better position to develop strategies to deal with any potential problems or weaknesses identified within the organization, and develop a plan of action to achieve their objectives;

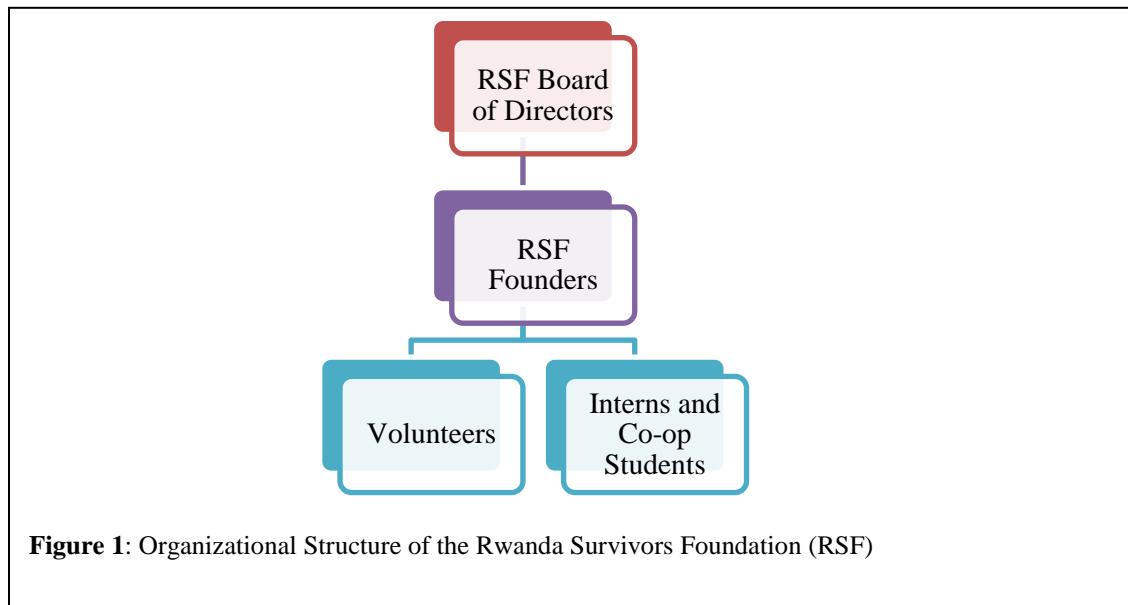
- **A formalized strategic plan can allow for stakeholders such as volunteers, board members and interns to become more engaged in the organization and have a deeper understanding of its various initiatives.**
 - It is important for these stakeholders to maintain a level of engagement and passion for the organization, as the founders, Emery and Alison, cannot drive the mission and vision of the RSF forward on their own;
- **A strategic plan can help to increase the legitimacy, transparency and accountability of the organization to potential donors.**
 - In an increasingly competitive fundraising environment, donors may want to conduct a careful review of the RSF before making decisions on donations. A review of documents such as a vision and mission statement, clearly defined goals and action plans can help donors to understand the RSF and what it hopes to accomplish.

1.2 PROJECT CLIENT

The RSF is a young organization. Emery Rutagonya, a survivor of the 1994 Rwandan genocide, and his wife Allison Burkett, began their plans to create a non-profit organization in January 2012. They were motivated by a common desire to educate Canadians about the genocide and help survivors preserve their memories, reconcile with their perpetrators, and move forward in their lives. While they are awaiting charity status approval from the Canada Revenue Agency (CRA), the RSF has created the following mission statement:

Mission: The Rwanda Survivors Foundation's mission is to advance and disseminate knowledge about the Genocide against Tutsi in Rwanda; to preserve the memory of those who suffered; and to provide spaces to reflect upon the moral and spiritual questions raised by the tragedy of Genocide. Rwanda Survivors Foundation strives to be a leader in the promotion of human rights by empowering survivors of the Genocide against Tutsi in Rwanda to inspire humankind (Rwanda Survivors Foundation, Our Mission)

Through collaboration with organizations such as the University of Toronto's Munk School of Global Affairs, Facing History and Ourselves, and the Canadian Association of Rwandan Youth (CARY), the RSF has recruited volunteers and Board Members, as well as raised awareness about their mission. The current structure of the RSF is presented below in Figure 1. The newly appointed Board of Directors oversees the programming of the organization. While the RSF Founders are de-facto Board Members, they are more involved in the day-to-day management of the organization. Volunteers and interns/co-op students report to them on their activities.



The RSF is made up of volunteers with a great deal of passion and knowledge on the topics of genocide, memory preservation, and using history as a tool to educate future generations. Their hope is for the RSF to become a leading Canadian non-profit organization focused on genocide awareness and education, offering the following programs and services:

- Lead in the development of the Survivor Memory Initiative, which uses innovative methods to record stories, and empower survivors through storytelling (Rwanda Survivors Foundation, Our Impact);
- Partner with Canadian universities to expand research efforts on genocide, memory preservation and reconciliation with the aim of having a greater voice from genocide survivors. As the RSF collects data and takes an active role in shaping the agenda around genocide, memory preservation and reconciliation research, they will disseminate information through workshops, events and public education campaigns in order to bring the data to life (Rwanda Survivors Foundation, Our Impact);
- Deliver seminars to high school teachers across Ontario about the genocide in order to provide them with content to use in courses on history, political science and international relations. The curriculum designed by the RSF will allow high school students to combine their learning about the history of genocide with the opportunity to visit Rwanda on a leadership trip to meet genocide survivors and bear witness to history (Rwanda Survivors Foundation, Our Impact);
- Secure funding and space to create the Canada Rwanda Centre for Genocide and Peace Studies. This Centre will provide public education on the genocide, social reconciliation, and hold an interactive archive of survivor memories through video, audio and written testimonies (Rwanda Survivors Foundation, Our Impact).

1.3 PROJECT OBJECTIVES AND RESEARCH QUESTIONS

Each organization is unique and there is no “one size fits all formula” that can be used in creating a strategic plan. Instead, through the review of literature on planning techniques and methods, speaking with stakeholders, and learning from other organizations with similar missions, the RSF can develop a plan that takes its complexities into account at the same time as learning from others with similar backgrounds.

The objective of this project was to develop a strategic plan for the RSF, which would encompass the following components:

- A vision statement that will help the public and RSF members to understand where the organization will be in an ideal future;
- A revised mission statement that accounts for all of the RSF’s programs;
- A stakeholder analysis in order to understand the unique interests of the RSF’s stakeholders to ensure there is a balance between meeting both their needs and the objectives of the organization;
- A strengths, weaknesses, opportunities, and threats/challenges analysis (SWOC/T) in order to determine any issues facing the RSF in order to develop strategies to strengthen the organization and its programs;
- A list of strategic goals and benchmarks for success while taking into account the SWOT/C that exist within the organization;
- An action plan which will go into details on how the strategies will be implemented (includes a timeline and accountabilities) that can be used by the RSF as a roadmap for their success.

To conduct this strategic planning process, there were several research questions that helped to shape the report presented below with the first question being the primary research question:

- What is the best way to align strategy with goals, action plan, performance objective and programs?
 - What is a strategic plan?
 - What are the most important elements within a strategic plan?

1.4 A BRIEF BACKGROUND ON THE 1994 RWANDAN GENOCIDE

The section below will provide readers with a brief history of the 1994 Rwandan genocide to contextualize where the need for programs from organizations such as the RSF came to be. In April of 1994, the entire world watched as political tensions between two historically clashing groups in Rwanda, the Hutus and Tutsi’s, came to a breaking point, leading to the death of approximately “700,000 people, mostly Tutsis, as well as about 50,000 politically moderate Hutus” (Staub, Pearlman, Gubin, & Hagengimana, 2005, p.299). The murder of the Tutsi population was part of a well-organized state-sponsored ethnic cleansing plan to form a new Rwanda with a Hutu dominated government. The perpetrators were not limited to the military as “ordinary people including neighbours and even family members in mixed families” took part in 100 days of brutal violence against the Tutsis and moderate Hutus (Staub et al., 2005, p.299). On

July 15, the Rwandan Patriotic Army (RPA) “composed mainly of children of Tutsi refugees” who had fled Rwanda in the 1960’s defeated the state military and put an end to the genocide (Staub et al., p.300).

Since the end of the genocide, a peace agreement was established to force an end to the violence, but as Staub et al., points out, “lasting peace requires changes in the attitudes of people in each group toward the other” and cannot be forced upon either side (p.300). While many perpetrators of the violence were taken to prison to be tried in the international courts, due to lack of evidence and a backlog of judicial proceedings, they eventually returned back to their homes as neighbours to Tutsi families (p.300). According to Staub et al., feelings of guilt, resentment and revenge are still prevalent amongst both groups in these communities, and to bring true peace and healing, the process of reconciliation and memory preservation must occur (p.300). Ibreck notes that while some survivors wish to move on with their lives and not focus on the past, others believe that “safeguarding the memory of the genocide is an essential step towards political and social transformation in Rwanda” (Ibreck, 2010, p.331).

1.5 THE IMPORTANCE OF THE ORGANIZATION: MEMORY PRESERVATION

Memory preservation is a process of healing that allows survivors to recount their experiences during the genocide through written and oral testimonies as well as establish monuments and memorial sites where lives were lost (Jacobs, 2011, p.160). Memory preservation can take the form of writing books, showcasing artwork, and preserving the remains of those who died during the genocide for the public to view (Jacobs, 2011; Ibreck, 2010; Hitchott, 2009). By doing this, survivors believe they can honour the dead and preserve the history of what has happened, to ensure that it is never to be repeated again (Jacobs, p.160).

As described by Jacobs (2011), the loss of life during the genocide was “tragic” and “a memorial culture began to emerge almost immediately, creating among the most extensive monument initiatives in recent genocide history” (Jacobs, p.160). Sites where mass murders took place, such as the Ntamara Catholic Church where thousands of lives were lost, became museums of the dead (p.162). Skeletal remains of victims were preserved, with many presented in the positions they died in (p.162). Clothing and personal belongings of the victims, as well as the weapons left behind by the murderers have also been put on display (p.162).

“While the cloths and skeletal remains of the deceased are reminders of horrific death and suffering, they also represent the sacred remnants of those whose lives were taken. Like the grounds of Auschwitz-Birkenau, the church sanctuary is a grave site where the dead are remembered, even as the horror of their death is recalled in the shelves of bones that line the walls and underground crypts.”

Source: Jacobs, J. L. (2011). Sacred space and collective memory: memorializing genocide at sites of terror. *Sociology Of Religion*, 72(2), p.163.

There is contention amongst the survivor community in Rwanda about whether the skeletal remains of the victims should be on display for public viewing. Opponents of these memorial sites call for alternatives such as the writing and publishing of detailed survivor testimonies of the atrocities (Ibreck, p.339). They argue that these can be cathartic for the survivors and allows for the remains of victims to be respected. However, as pointed out by Jacobs (2011), Ibreck (2010), and Hitchott (2009), these memorial sites still allow survivors to reconnect with their loved ones in a sacred space, similar to a grave site. Hitchott (2009) argues that without preserving the bones, which present material evidence of what happened “victims’ stories will be forgotten; they will literally turn to dust” (p.49).

Memory preservation is also a part of the mourning process. Many survivors have felt that working to preserve remains and taking care of the memorial sites allows them to feel closer to their lost loved ones, and is “an expression of their enduring commitment to the dead and to each other”(Ibreck, p.340). Ibreck also argues that the “bones are regarded as the most powerful evidence of the atrocity, traces which can prevent forgetting and denial” (p.339). Jacobs echoes this argument and believes that these monuments serve as reminders to future generations on what could happen if history is forgotten, and that it demonstrates how small resentments over a course of time can lead to catastrophic results (p.154). Both authors argue that the practice of memory preservation has the potential to help in preventing future atrocities.

1.6 ORGANIZATION OF REPORT

Chapter 1 of this report has provided an overview of the research questions to be addressed, the deliverables of the project, as well as a background on the RSF and the Rwandan genocide. Chapter 2 of this report will review literature from peer reviewed and academic journals, published by researchers and academics over the last 15 years. Through a scholarly analysis of literature on strategic planning methods and practices, a conceptual framework was developed in order to be used in the RSF’s strategic planning activities. Chapter 3 will describe the methodology used for the strategic plan, and Chapter 4 will provide an overview of the findings of the stakeholder analysis, focus group sessions, and an environmental scan. Chapter 5 synthesizes the findings within a discussion of the RSF and presents the strategic plan developed through the project. Chapter 6 identifies options for the RSF’s leadership team to consider as a next step, and Chapter 7 will present a summary of the main discussion and conclusion.

2.0 LITERATURE REVIEW

2.1 INTRODUCTION

This section critically analyzes and discusses key themes found in the literature on strategic planning in order to develop a conceptual framework that can be used in the development of the RSF’s strategic plan (UVic Masters Resource Page, Literature Review, par.9). While there are many texts and guides on the topic of strategic planning, it was important to review texts on strategic planning in nonprofit and public organizations to develop a process that was unique and relevant to the needs of the RSF. Through reviewing several contemporary approaches, the factors that were found to have the greatest impact on the success of a strategic plan include: good leadership, a clear mandate, vision and mission statement, well-engaged stakeholders, SMART goals and objective statements, and a realistic implementation strategy. The chapter below will discuss these factors in detail.

There were two texts that became critical in understanding the strategic planning process. John Bryson’s *Strategic Planning for Public and Nonprofit Organizations* (2011) was instrumental in learning about the theoretical concepts behind strategic planning and identifying other important research. Through Bryson’s presentation of a 10-step planning process, he introduced many important texts that were later used in this literature review. In addition, Carter McNamara’s *Field Guide to Nonprofit Strategic Planning* (2007) provided practical checklist and processes that could be used by an organization to conduct a planning process, build a budget, and develop a fundraising strategy.

The University of Victoria’s online database system is quite extensive and was extremely useful in locating information. Keyword searches in the articles search engine yielded success in locating journal articles and scholarly works over the last 15 years. Online databases such as Business Source Complete (EBSCO), Emerald Journals, Project Muse and Sage Knowledge and Reference were also used to locate information. A list of keywords used is listed below in Figure 2.

Balanced Scorecard	Stakeholder engagement
Facilitation of planning	Strategic communication
Memory preservation	Strategic execution
Mission statement	Strategic goals
Mission Statement	Strategic issue
Nonprofit planning	Strategic management
Reconciliation	Strategic objectives
Rwanda genocide	Strategic thinking
Stakeholder	Vision Statement
Stakeholder Analysis	

Figure 2: Keywords Used in Databases for Literature Review

2.2 LEADERSHIP AND PARTICIPANTS IN THE PLANNING PROCESS

One of the most important themes identified in the strategic planning literature was the need for strong leadership and participation within the organization. The section below discusses the role of the planning champion, sponsor, and committee and their impact on the success of a strategic plan.

2.2.1 STRONG LEADERSHIP

Bryson and McNamara both identify two important individuals in an organization that are necessary for the planning process to be initiated, and carried forward. The first is described as the *project champion*. This individual must be committed to the planning process for the organization and can also act its initiator (Bryson, p.104). The champion generally has an idea of what the results of the planning will be but does not allow these preconceived notions stop the process (p.104). Leaders can also become champions by managing the daily planning process by ensuring that there is scheduled time to engage staff (through meetings and planning groups), involving the organization, and keeping the process going (p.366).

Along with a champion, they argue that there must be a *project sponsor*, who is a person or group that gives the planning legitimacy (p.105). The sponsor can be a senior executive or lead in the organization, and is responsible for providing the “authority and resources for people to carry out the planning process” (McNamara, p.39). The sponsor encourages discussions within the organization on how to become more strategic in fulfilling the organization’s goals (Bryson, p.362). Project sponsors are usually within an executive role within the organization, which has a positive impact on emphasizing the need for seeing through the plan to implementation (p.362).

2.2.2 PLANNING COMMITTEE

Both Bryson and McNamara also agree that having a strategic planning committee is important to the process. A planning committee further enhances the legitimacy of the planning and provides ‘buy in’ for various stakeholders within the organization (Bryson, p.114). McNamara goes into great detail on the criteria for selecting members to the planning committee, insisting that there should be at least 5-8 highly committed individuals to oversee the development of the plan (McNamara, p. 214). He identifies four specific roles that should be part of any planning committee: the Chair of the committee, the individual in charge of planning, the champion, and an administrator to write the plan (p.214).

While McNamara sees the creation of the planning committee as a starting point to building a strategic plan, Bryson cautions against forming this committee or adding members too early on in the process. Bryson also does not specify the number of individuals or the roles within the committee, but he recommends members who have a “blend of process skill and content knowledge” in order to be effective (p.113). Bryson also supports the notion that it is easier to include members as the plan progresses, rather than trying to drop individuals if it is realized that they are not in fact relevant to the process (p.109). Bryson suggests that a planning committee is not needed if the organization is small in size, as the plan should be simple and

easy to understand (p.109). In smaller organizations, he recommends that a planning facilitator, along with the assistance of an outside consultant (with expertise in strategic planning) could coordinate the entire process (Bryson, p.113). While McNamara does not offer a similar structure, he does explain that a planning committee will not be necessary if the number of Board members and staff is less than 10 people (McNamara, p.214).

2.3 AGREEMENT ON THE PLANNING PROCESS AND OUTCOMES

Developing an agreement on what the plans outcomes will be is important to the process, and both McNamara and Bryson highlight the importance of stakeholders discussing and agreeing on what the strategic planning process will entail, as it “represents a plan for planning” (Bryson, p. 83). This agreement should include several key aspects such as the purpose of the planning process, specifying the groups that should be engaged in the process, the steps that will need to be followed, the timing of the plan, resources, and the desired outcome of what a successful plan would look like (Bryson, p.84). A strong initial agreement between stakeholders and the planner is very important so that expectations on deliverables are clear. Both Bryson and McNamara also identify several items that should be part of the initial agreement, such as a timespan, meeting schedules and sequence of events (McNamara, p.17; Bryson, p.106). A written agreement can also outline the purpose of the planning process, groups which will be involved, the role of the planning committee, how information will be communicated, the timing of reports, and the leadership’s commitment of resources (Bryson, p.105-106).

2.4 VISION AND MISSION STATEMENT

The vision and mission statement help guide the strategic planning of an organization. A vision statement describes what the organization “should look like as it successfully implements its strategies, achieves its full potential, and creates significant and lasting public value” (Bryson, p.271). It is future-oriented and also provides “direction and motivation for members of the organization” (McNamara, p.77). A mission statement is a “declaration of the organizational purpose” (Bryson, p.138). This statement will also include a description of the organizations stakeholders and the services it provides (McNamara, p.73). The section below will describe both statements in greater detail and review literature regarding the formulation of these documents.

2.4.1 VISION STATEMENT

While Bryson recommends that organizations should wait for at least one cycle of strategic planning before developing their vision statement (p.282), other academics such as O’Brien and Meadows (2000), and Zuckerman (2000) see it as an integral part of the initial process. Bryson argues that the organizational vision should be externally focused and based on the ideals of what the organization aims to achieve. (p.282). Similar to McNamara, he believes the vision should be inspirational in order to motivate staff and bring the organization together (p.283). The vision should also be widely distributed to all stakeholders and staff, as well as published on the organization’s website and social media (p.284). A vision statement should be referred to regularly to help guide an organization’s decision making (p.285).

O'Brien and Meadows (2000) focus their research on how visions are developed through the presentation of the results of a corporate survey they conducted, and a seven step process that is present in the organizations interviewed. Their study of 100 organizations found that 91% had a vision or were currently developing a vision (p.39). Most of the respondents agreed that a vision helped them to plan for where the organization wanted to go and provided an aspiration of where they could go (p.39). While some organizations in the sample were quite methodological about how the vision was formed (studying market trends, reviewing data on best practices) and involved broad discussions amongst the organization, others involved a conversation among a select group (p.40). Of those surveyed, 87% felt that the vision had a positive impact on the success of their organization because it gave them direction (p.42). From conducting the surveys and analyzing the results, O'Brien and Meadows ultimately confirm that while there are a number of methods to developing a vision, using a formal or theoretical approach is not very common (p.42). Instead, they argue that most visions come from informal methods and discussions.

- 1) Analyze the company's future environment
- 2) Analyze future competition
- 3) Analyze company's resources and core competencies
- 4) Clarify organizational values
- 5) Develop vision statement
- 6) Contrast vision with the present state of the organization
- 7) Use vision to develop strategic objectives, goals and options

Figure 3. O'Brien and Meadow's Visioning Process.

Source: O'Brien, F. & Meadows, M. (2000). Corporate visioning: a survey of UK practice. Journal of the Operational Research Society, 51, p. 37.

Zuckerman (2000) uses a health care perspective to discuss the value of vision on strategic planning. He describes the vision statement as the "cornerstone of the strategic plan" as it "provides the reference point for strategy development (how to achieve the vision) and for goals, objectives and actions that are components of the future vision" (p.298). While he is less focused on the methodology or number of individuals involved in developing the statement, he emphasizes the importance of concise and clear language in the vision statement, as well as using language that generates enthusiasm within the organization (p.298).

2.4.2 MISSION STATEMENT

Bryson believes that the mission statement plays an important role in allowing internal and external actors to understand the real purpose of the organization (p.138). He believes that a mission statement can vary in length and while some organizations go into a great deal of detail, others have mission statements that act as slogans (p.138). Bryson breaks down the mission statement as answering 6 important questions:

- 1) *Who are we?* By answering this question, the organization is able to be clear about who they are and what the organization is hopes to achieve (p.139)
- 2) *What are the basic social and political needs we exist to meet or what are the basic social or political problems we exist to address?* By answering this question, the organization is able to find a source of legitimacy (p.139)
- 3) *What do we do to recognize, anticipate and respond to these needs or problems?* This question encourages the organization to research the needs that must be fulfilled by its stakeholders, which can be in a continuous state of change depending on the organization (p.140)
- 4) *How do we respond to our key stakeholders?* This question helps the planning team to consider the type of relationship they would like to have with their key stakeholders (p.141)
- 5) *What are our philosophy, values and culture?* By clarifying these points, the organization will be able to maintain its integrity (p.141)
- 6) *What makes us distinctive or unique?* By asking this question of the planning team, the mission of the organization can be clarified in a way that will clearly articulate the unique service of the organization, and what differentiates it from other organizations (p.142).

Figure 4. Questions to Address in Developing Mission Statement.

Source: Bryson, John M. (2011). *Strategic Planning for Public and Nonprofit Organization* (4th ed.). San Francisco, CA: Jossey-Bass, p.139-142.

Bryson believes that the best way to write the mission statement is to revisit the formal and informal mandates of the organization with the planning team (p.144). Next, they should complete a stakeholder analysis and mission statement questionnaire, and after discussing the responses of the group, ask one individual on the team to draft a mission statement (p.144-146). Once the mission statement is drafted, the planning team will review the statement and either revise or approve of the document (p.147). As soon as the team agrees on the mission statement, the group should use it as a reference point for formulating goals, identifying issues and developing strategies (p.147).

While Bryson does not specify how many members should be part of the planning, McNamara argues that the mission statement should be written by a group of 4-6 people (p.75). He also suggests creating evaluation criteria for the mission statement and then measuring the draft against this criterion (p.75). Unlike Bryson, McNamara also recommends completing a situational analysis or stakeholder consultation prior to developing the mission statement (p.74).

2.5 SITUATIONAL ANALYSIS AND STAKEHOLDER ENGAGEMENT

Conducting a situational analysis helps to assess the internal strengths and weaknesses, and the external opportunities and challenges/threats facing an organization. Bryson argues that by “understanding the external and internal contexts within which they find themselves” an organization can come up with effective strategies that will be beneficial to its stakeholders (p.150). There are two main types of analysis that will be discussed below. The first is a stakeholder analysis, which focuses on the individuals and groups that have the most effect on the success of the organization. Second, a strengths, weaknesses, opportunities, and challenges/threats (SWOC/T) analysis can reveal actions that should be taken to minimize weaknesses and avoid threats, while building on strengths and taking advantage of opportunities (p.155).

2.5.1 STAKEHOLDER IDENTIFICATION AND ANALYSIS MODELS POWER VERSUS INTEREST GRID

Bryson proposes several methods to identifying and analyzing the impact that a stakeholder can have on an organization. The first is a *power vs. interest grid*, which is a two-by-two matrix that sorts stakeholders by their interest in the organization and their influence within it (p.408). Originally described by Eden and Ackermann, this grid determines the stakeholder viewpoints to take into account and the “people whose buy-in should be sought or who should be co-opted” (Bryson, p.408). Stakeholders in the two top categories have the most interest in the organization, while lower categories have not shown as much interest (Eden and Ackermann, 2011 p.183). They argue, “managing stakeholder demands becomes clearer when their interest in organizational strategies is separated from their power to influence the outcome of these strategies” (p.192). In this type of analysis, stakeholders are sorted into four categories:

- *Players* have a high interest and level of power, and play an important role in the organization. It is important to consider their interests in any planning activities (Bryson, p.408);
- *Subjects* have a high level of interest but little power (p.408);
- *Context Setters* have power but little interest (p.408); and
- *Crowd* stakeholders have little interest or power (p.408)

PARTICIPATION PLANNING MATRIX

A *participation-planning matrix* can also be used to help a planner in determining how to engage different stakeholder groups throughout the planning process. This matrix, which is considered more of a table, is formed by creating a table of the steps in the planning process, and determining whether stakeholders will be informed, consulted, involved, collaborated with or empowered at each stage of the process (Bryson, p.410). Bryson emphasizes that it is important that a planner understands the stakeholder’s interests and the coalitions that may have been built between groups in order to formulate strategies that are worth implementing (p.410).

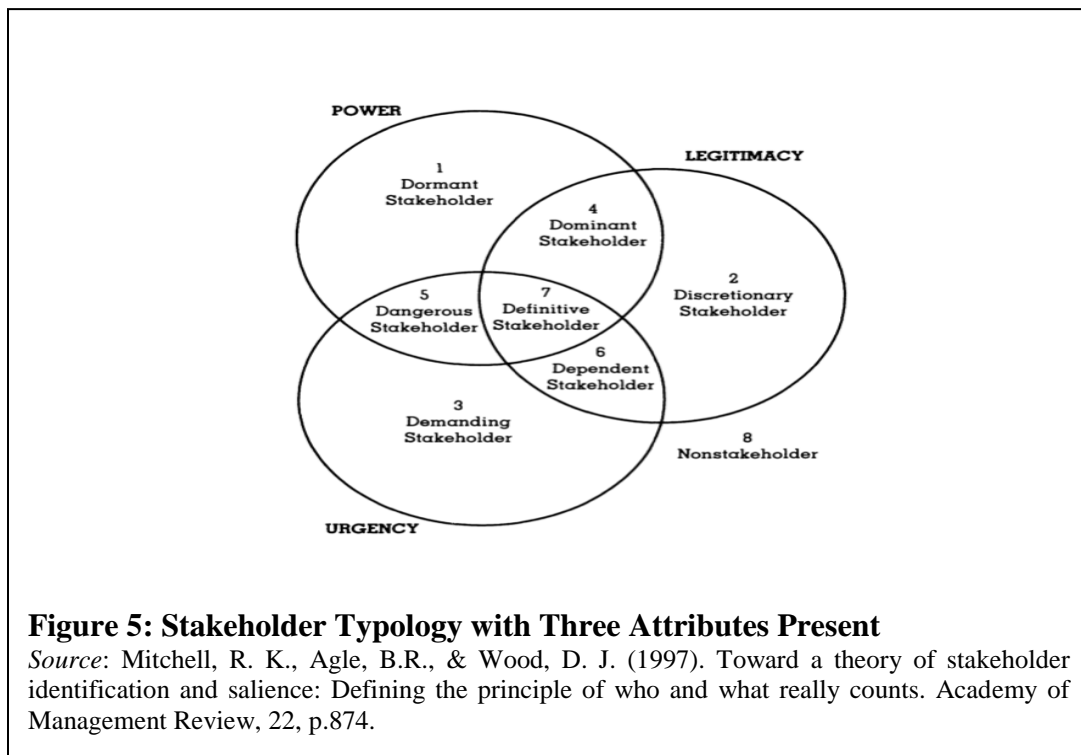
STAKEHOLDER INFLUENCE NETWORK

A third chart, the stakeholder influence network is explored to see what interactions various stakeholder groups have with one another. Members of management want to understand the formal and informal relationships that exist between these groups (Ackermann and Eden, 2011, p.192). They argue that “discovering network ties can often reveal new stakeholders” as some stakeholders are found to be more or less powerful than initially thought when using the power-interest grid (p.192). It also reveals clusters for coalition building (p.192). Informal relationships are not always well understood but can be more powerful than thought (p.192). A third chart, a stakeholder management web, was used to explore the actions, objectives and motivations of key stakeholders (p.192). This chart helps to understand the motivations of stakeholders better and assess different strategies that will be mutually beneficial for them and the organization (p.193).

ANALYSIS OF STAKEHOLDER MANAGEMENT RELATIONSHIPS

Mitchell, Agle and Wood (1997) argue that to understand which stakeholders are most important, planners must evaluate stakeholder-manager relationships in terms of power, legitimacy, and/or urgency (p.864). The authors define power for a stakeholder group as the ability to impose its will on the organization (p.865). They also recognize that power for this group is in constant transition- it can be gained and lost quite easily (p.865). Urgency exists when a relationship is time-sensitive and critical (p.867).

The authors present a Venn diagram to demonstrate the different types of stakeholders that may exist:



The *latent* group of stakeholders includes dormant, discretionary, and demanding.

- Dormant stakeholders possess power but don't have legitimate relationships or urgent issues within the organization (p.874). They have little or no interaction with the organization, but because they hold power, management should be conscious of them if they were to gain urgency or legitimacy (p.875);
- Discretionary stakeholders have no urgent reason for management to engage in active relationship with them (p.875);
- Demanding stakeholders have urgency, but it may not be enough to keep management's attention (p.875);

The *expectant* group consists of stakeholders who have expectations from the organization to respond to their interests (p.876). This group consists of dominant, dependent, dangerous and definitive stakeholders.

- Dominant stakeholders have legitimate claim and power, and their interests will be important to the management (p.876).
- Dependent stakeholders will depend on other groups and management to carry out their interests, as they do not possess a degree of power themselves (p.877).
- Dangerous stakeholders are those who lack legitimacy but have power and urgency, and are described by the authors as coercive to the organization (p.877). The authors argue that it is important that this group be identified early on so that the organization can develop strategies for dealing with them (p.878).
- Definitive stakeholders will be given high priority by management, as they possess a balance of power, legitimacy and urgency (p.878).

SUMMARY

Regardless of the model that is used in identifying stakeholders, it is important to identify stakeholder interests and take them into account undertaking a strategic planning process within an organization. While each model offers a different level of stakeholder analysis, the power vs. interest grid offers the most simple and effective form of measuring a groups' influence and power over the organization. By sorting the stakeholder groups, the planning team can organize a strategy for involving the key players within the strategic process. The one issue that comes up in all of these models is the subjectivity that is required to sort various stakeholder groups, and this is why it is important to have multiple people determining these factors.

2.5.2 SWOC/T ANALYSIS TECHNIQUES

THE SNOW CARD MODEL

Bryson recommends the *snow card technique* for completing the SWOC/T, as it is a method that combines brainstorming with synthesizing in order to produce a list of possible strengths, weaknesses, opportunities and challenges/threats to the organization (p.170). The snow card technique is completed by assembling a group of stakeholders in a meeting and providing each individual with several index cards. The following questions should be asked:

- 1) What major external or future opportunities do we have?
- 2) What major external or future challenges or threats do we face?
- 3) What are our major internal or present strengths?
- 4) What are our major internal or present weaknesses?

After asking each question, the stakeholders will have an opportunity to record as many responses as they can think of. The answers to each question are pasted onto the wall. Once all questions have been answered, the planner revisits each list of responses and engages in a discussion with the group, in order to organize the responses into common themes (p.171). Bryson argues that these lists should be “carefully discussed, analyzed, compared and contrasted” (p.173). By doing this, the group can identify actions that need to be taken immediately and “help to effective strategies in response to the issues” (p.171).

RANKED LIST OF OPPORTUNITIES, STRENGTHS AND WEAKNESSES

McNamara agrees with the other writers on how important it is to identify opportunities and threats. He argues that what is considered as an opportunity or threat may be subjective, and to ensure that this is clarified during an analysis (p.57). He suggests that after the planning group brainstorms on these ideas, it is important to develop a ranked list of the most important opportunities (p.59) as well as with strengths and weaknesses (p.66). McNamara finds that identifying strategic issues can provide several benefits to planners, such as being able to recognize and name issues, refocus in order to plan and increase the credibility of the planning process by soliciting feedback through the focus groups in order to recognize the major issues of the organization (p.66). By ranking these issues in order of importance, the group can decide which should be addressed in the short-term (p.66).

SWOC/T MATRIX

In contrast, Maculley Jr (2003) proposes a SWOC/T matrix, which applies quantitative metrics to a project in order to determine the level of importance that managers should pay to a particular issue (p.56). This matrix consists of weighing these variables using a 10 point score, where 10 would be of greatest value and probability of success. For example, a score of 10 in the opportunity section of the matrix would suggest the project could accomplish many things (p.56). While he presents this as a simplistic model, this method is quite confusing to understand or implement. This model involves allocating an arbitrary weight to each category in order to determine what is considered a strategic issue. While his model may be effective in the strategic planning and project management within engineering firms (as it was originally designed for), it is not very easy to use for a nonprofit. Also assigning an arbitrary number or weight to a category can confuse the planning group and lead to focusing on issues that are not important. Instead of assigning numbers to emphasize importance, it is far more effective to discuss the responses to the SWOC/T with a group of stakeholders, and discuss which issues are most important to work on.

GOALS GRID

Nickols and Ledgerwood (2006) offer an alternative to the SWOC/T analysis, in the form of a Goals Grid (p.36). The goals grid is a simple 2x2 matrix, which asks two fundamental questions to planners about whether there is something that is desired, and whether they possess

it. By answering these Yes or No questions, planners will find themselves with information from four quadrants- achieve, preserve, avoid, and eliminate (p.36).

- *Achieve* is when you want something that you don't have, your goal is to obtain it by developing a list of what you want (p.36);
- *Preserve* is when you want something that you already have, develop a list for what you want to preserve (p.36)
- *Avoid* is something you do not want and do not need. Planners should develop a list of what you want to avoid (p.36)
- *Eliminate* is something you have but do not want, and therefore planners should develop a list of what you want to eliminate (p.36)

SUMMARY

Nickols and Ledgerwood argue that the goals grid is simple to use and flexible for each organization (p.37). They cite feedback from clients that calls the goals grid an effective method for generating group discussion, whereby the responses are input into the goals grid (p.38). While this is also offered as a simplistic model, the SWOC/T analysis using the snow card technique offers a superior, more detailed discussion and allows the group to think outside the box from the simple organizational processes. Once the group has conducted the SWOC/T analysis, they could adapt McNamara's ranked list to sort the information by priority.

2.6 IDENTIFY STRATEGIC ISSUES

Once the situational analysis is completed, Bryson suggests a method similar to McNamara's ranked list, in which the planning team organizes issues based on priority (p.209). Bryson points out that there are three types of strategic issues that may come up. First, there are issues that require no action but must be monitored. Next there will be issues that can be handled as part of the organization's regular strategic planning cycle. Last, there are issues that require urgent attention and cannot wait for the next cycle (p.215). In contrast, McNamara classifies issues as strategic if they involve findings from the situational analysis, are important but not urgent, have a solution that is within the realm of the organization's experience, and are focused on the nonprofit (p.68).

McNamara suggests that each planner must complete a sequence of steps: compile a list of possible issues based on the situational analysis, discuss as a group to ensure that there is nothing missing, assess if there are common themes in the findings, and develop a final list of 5-8 of the most important issues (p.70). From this point, planners can start to rank the list according to the greatest urgency (p.70). McNamara recommends coming up with solutions within a few weeks of finalizing the list of strategic issues in order to give time for the planner to evaluate but keep up momentum (p.71).

Parallel to Bryson and McNamara, Mike Dale (2002) argues that strategy involves taking a look at what needs to be done and choosing which problems could lead to an effective solution. He argues that once a list of issues has been generated, the process of issue shaping must occur in order to come up with a list of Key Strategic Issues (p.3). Dale differs from Bryson and

McNamara by recommending that each of these issues should be “tested against chosen criteria in order to assess how significant the potential effect could be” as well as the probability that the effect will occur (p.4). The problem with this model is similar to Maculley Jr’s (2003) SWOT/C matrix methods model. Assigning arbitrary values to the issues will not necessarily be correct in identifying those that are most important, and instead it is best to discuss the strategic issues amongst the planning team and develop a solution.

2.7 FORMULATING STRATEGIES

Strategy formulation is the process of developing “a set of strategies that will effectively link the organization (or community) to its environment and create significant and enduring public value” (Bryson, p.223). The section below discusses several different methods used to formulate strategies to be adopted by a non-profit organization.

2.7.1 FIVE-STEP PROCESS

Bryson reminds readers that the most important factor in this stage is not the processes used to formulate and implement the strategy. Instead, it is far more important to have meaningful strategies that address the issues of the organization, and that can be implemented (p.254). He cautions that while big organizational changes can make an impact, incremental strategies can also be effective in achieving an organization’s goals (p.259). He highlights the merit of a five-step process which asks planners to consider several questions:

1. What are the practical alternatives, dreams, or visions we might pursue to address this strategic issue?
2. What are the barriers to the realization of these dreams?
3. What major proposals might we pursue to achieve these alternatives or to overcome barriers?
4. What major actions must be taken in the short-term (1-2 years) in order to implement these proposals?
5. What specific steps must be taken within the next six months to implement the major proposals and who is responsible for each task?

Figure 6: Five-Step Process for Strategy Development

Source: Bryson, John M. (2011). Strategic Planning for Public and Nonprofit Organization (4th ed.). San Francisco, CA: Jossey-Bass, p. 235.

He recommends that the planning team use the snow card technique to answer each question, as it allows for creative brainstorming, discussion, and clustering (p.236). This exercise also allows the group to consider implementation barriers before coming up with the final strategy, which helps to mitigate potential problems (p.237). Once strategies are decided on, the group must consider whether they are reasonable, if they can be folded into another overall strategy, whether there is consistency, what resources can be devoted, and what specific steps needs to be taken for the strategy to work (p.238).

2.7.2 ACTION-ORIENTED STRATEGY MAPPING PROCESS

Bryson also proposes a second strategy formulation tool called action-oriented strategy mapping process, in which options are created for each issue (p.238). Using documents such as the SWOC/T analysis as a starting point, the group is asked to use the snow card technique to write as many options as they can think of for each issue. Next, a facilitator will organize the options in order to create “a map of action to outcome” (p.239). The map is discussed, reviewed, and revised (p.239).

2.7.3 SOLICIT FEEDBACK FROM KEY STAKEHOLDERS

Alogan and Yetis’ (2006) work presents a group of techniques to define objectives and formulate strategies. They define strategic objectives as the translation or projection of the vision in the next 5 years and argue that the objectives should be clear, measurable, realistic, and qualitative (p.677). For them, strategic objectives are needed to align strategy with performance and present a method that has worked with 4 organizations. The steps are summarized below:

- A workshop is held with management to formulate the vision, mission and values of the organization with approximately 25-30 people per session (p.677).
- Next, lower levels of staff are asked to do the same, and then a third meeting is held to consolidate the views (p.678).
- Environmental and SWOC/T analyses are next completed involving various levels of staff (p.680). Through these sessions, final versions of the vision and future lines of activity document are created (p.680).
- Next, top and middle management creates organizational performance measures through open discussions (p.680). They then will define critical measures of performance (also known as key performance indicators) (p.681).
- After a few weeks, top and middle management then have a one-day workshop and formulate the objectives (p.681).

Collis and Rukstad (2008) also believe in consultation and feedback from stakeholders. They argue that in order to create a strong strategy statement, organizations need to understand the needs of clients and have unique ways of delivering on them (p.89). Employees at all levels of the company should be involved in coming up with the strategy statement through a consultative process, and once finalized, should be widely distributed throughout the organization (p.90). They believe that words are powerful and lead to action and ultimately the success of an organization (p.90).

2.7.4 ACTION-ORIENTED GOALS

Lindquist (2006) argues that vague goals are not effective in motivating or helping staff, and instead need several qualities (p.10). Goals should be action-oriented, have measurable outcomes, be realistic to capabilities of the organization, and have clarity so that everyone in the organization interprets it in the same way (p.10). He argues that in order for employees to be on board with the goals, managers should be strong role models, have confidence in the skills of their staff, give employees feedback that fits into the larger goals of the organization, be flexible in achieving goals, track progress, and offer awards (tangible or non-tangible) for achieving goals (p.11).

2.7.5 BUILDING A STRATEGIC MANAGEMENT SYSTEM – THE BALANCED SCORECARD

Kaplan and Norton (2001) introduce the concept of a Balanced Scorecard, which links measurement to strategy (p.87). It balances the tangible and intangible measures of the organization. They argue that there has been a shift from measuring tangible assets by way of financial indicators to measuring intangible assets such as customer relationships (p.88). The framework for the scorecard is divided into four perspectives:

- *Financial*
They argue that companies achieve financial success through growing revenue and being efficient with their resources (p.93).
- *Customer*
The company differentiates itself from its competitors in many ways, from operational excellence (competitive pricing, good quality products and services) to customer intimacy (focuses on providing good service), and product leadership (features of their products and services) (p.93)
- *Internal Process*
When an organization has a solid understanding of its customers and finances, they can:
 - Build the franchise by developing new products and services (p.93)
 - Increase customer value by continuing to improve the relationship (p.93)
 - Achieve operational excellence (p.93)
 - Become a good corporate citizen (p.93)
- *Learning and Growth*
In this stage, managers match the intangible resources (employee capabilities and skills, corporate climate, etc.) with those that will support the strategy of the organization (p.94).

Kaplan and Norton argue that strategy maps are powerful diagnostic tools that can help organizations detect flaws through the Balanced Scorecards (p.94). They acknowledge that nonprofits have difficulty with using the balanced scorecard because of its emphasis on financial measures and their solution to this is to rearrange and put customers (both donors and clients) at the top of the scorecard (p.98). They also recommend placing a high level objective at the top of the scorecard and putting objectives on the scorecard that relate to the larger one (p.99).

While the balanced scorecard was created to measure past performance, it also helps to create a direction for the future, becoming an organizing system (p.102). They argue that since adopting this system, several organizations have had breakthrough performance by utilizing their tangible and intangible assets (p.102). They argue that the balanced scorecard gives organizations “the recipe that enables ingredients already existing in the organization to be combined for long-term value creation” (p.102).

Bryson echoes Kaplan and Norton in discussing the importance of building a strategic management system. He recommends that such a system should link goals and key performance indicators to results (p.349). He recommends a balanced scorecard to help in identifying indicators and connects these measures to programs and activities of the organization (p.349).

The strategic management system should be able to generate measurable data that can be tracked in order to review and update the system (p.350).

2.7.6 CLEAR STRATEGY STATEMENT

Collis and Rukstad (2008) argue that when companies have strategies that are not clear and employees do not internalize them, they fail to execute them (p.84). They believe that by clearly defining the strategy, formulation and implementation become easier (p.84). They argue that three elements must be defined in order for the strategy to be successful:

- *Objective*

They believe that many organizations confuse their statement of values or mission with their strategic objective (p.85). A strategic objective is a single goal (p.86).

- *Scope*

The scope specifies where the organization will not go (p.86). For example, clarifying who the clients or stakeholders are helps to develop a strategy for the organization.

- *Defining Advantage*

Clarifying the unique services or programs that the organization can offer is extremely important in developing strategy statement (p.87). This involves a statement that explains why the customer should purchase your product and why the organization is unique above all others (p.87)

2.7.7 ALIGN STRATEGIC DIRECTIONS WITH VALUES

Towers and Spanyi (2004) emphasize the importance of having a clear strategy that is understood by the leadership team (p.48). They suggest the creation of a business model that aligns the values of the organization with the strategic directions as it makes the strategy clear and easy to understand (p.48). It is important that strategy is communicated with all staff through town hall meetings and group discussions, and that they align the organization's goals with their own objectives (p.49). Towers and Spanyi argue that it is important for organization's to create structures that clarify the roles and accountabilities of all staff, and to have compensation and recognition programs in place to help in strategy implementation (p.50). They also emphasize the importance of culture on the success of a strategy. They believe that by identifying the organization's values, they can identify the behaviours and actions that reflect the values (p.52).

2.7.8 SUMMARY

While Alogan and Yetis go into a great length of detail on the considerations that managers must make in formulating objectives, the process presented is too complicated for small nonprofits to utilize. Their suggestion of soliciting feedback from approximately 125 people suggests that their method works best in larger organizations. Furthermore, the suggested timeframe for taking several days to plan and facilitate stakeholder feedback suggestions leads to the consideration of whether it is the best use of resources for smaller organizations. Kaplan and Norton's balanced scorecard offers an effective method to communicate strategy and implement a performance management system but it is quite complex to develop for an organization's initial strategic plan.

Most small nonprofits have time constraints on these types of activities, both at the Board and volunteer level. It is important to solicit feedback from stakeholders on the strategic direction, but in order to reduce the burden of time, a Planner or planning team can formulate these strategies as a follow-up to the SWOC/T discussion. By developing action oriented goals, performance measures and a strategy statement that links the activity with the organization's value and vision, they will be able to formulate an effective strategy for the organization.

2.8 DRAFTING AND ADOPTING THE STRATEGIC PLAN

McNamara goes into a great deal of detail on the drafting of the strategic plan, including the sections that should be present, which includes an executive summary, a description of how the plan was developed, action plans and financial plans. He believes that once that plan is drafted, it is important to arrange an internal review within the organization to ensure that the leadership of the organization can offer their feedback (p.115). Important questions to ask during this review include questions regarding the direction, partiality and accountability of the plan (p.115). He also recommends an external review amongst several stakeholders to gather input regarding the goals and strategies and distribution of the plan (p.115). Once any revisions have been made, he believes that the plan should be presented to the Board of Directors for approval (p.116). Once approval has been granted, the plan can then be shared amongst the organization and to key stakeholders.

Bryson goes into less detail than McNamara on the actual adoption of the plan, as differences exist depending on the structures of approval within an organization. For him, the most important factor is that the plan addresses the issues most salient to the stakeholders with realistic solutions (Bryson, p.243). Within the organization, it is extremely important that this step is simultaneous with an organizational culture that looks favorably on the idea of change, and that key stakeholders are rewarded for their support (p.243). Bryson also discusses the windows of opportunity that allow a formal adoption of the plan. He argues that there are three types of windows- those opened by the emergency of a pressing issue, those opened by political shifts such as a change in priority from donors, and those opened by reaching key decision points (p.244).

2.9 IMPLEMENTATION OF THE PLAN

Bryson argues that the implementation of a strategic plan is critical as it brings the plan to life (p.286). The section below will discuss the importance of developing effective action plans, and implementation processes in order to implement the steps listed above.

2.9.1 DEVELOPMENT OF PERFORMANCE INDICATORS AND ACTION PLANS

Bryson suggests that performance indicators should be developed to assess whether strategies are working (p.299). It is also important to develop action plans so that there is clarity on how the strategies will be implemented, when it will occur, and by whom (p.301). These action plans should include resource requirements, roles and responsibilities, and the results,

objectives and milestones (p.301). He recommends introducing strategies that have an easy implementation earlier on in order to help build momentum (p.302). He recommends breaking the implementation plan into clusters, which will makes it easier to tie it to specific resources and develop budgets (p.302). This stage requires resources such as time, people, and money to be allocated effectively (p.302).

McNamara also recommends the creation of an action plan for the strategies developed (p.96). An action plan specifies the objectives for each strategy, and assigns responsibility within the organization for the completion of tasks, the timeline for completion, resources required and the performance target (p.97). He argues that how detailed a plan is depends on how formal the leadership would like the plan to be (p.99).

2.9.2 APPROVAL BY BOARD OF DIRECTORS AND INTERNAL TRACKING

McNamara also highlights several other key components needed for successful implementation. First, the plan must be authorized by the Board of Directors in order to ensure legitimacy and implementation (p.120). Next, resources must be allocated towards the planned changed (p.121). Work plans must be created to break down the tasks and assign timelines, and policies and procedures must be revised to incorporate the new strategies (p.121). He also recommends using status reports, staff meetings and action plans as a way to track the implementation (p.122-123).

2.10 CONCEPTUAL FRAMEWORK FOR THE RSF'S STRATEGIC PLAN

Bryson calls the planning process “deliberatively disruptive” because of the way that strategic planning shakes up the routines of an organization (p.115). He argues that the process can be quickly derailed by unexpected events, but that the strong force of people- a planning champion, sponsor or team can help the process succeed (p.115). Rather than focus on specific steps, he argues, “the way in which strategies are formulated is less important than how good the strategies are and how well they are implemented (p.245). While McNamara’s work is more process-driven, McNamara also cautions that the most important benefit from the planning process is not the plan itself, but the strategic thinking that occurs (p.6).

In Fiona Graetz’s work on strategic thinking and planning, she also echoes a similar argument, which is made through presenting a case study that illustrates how scenario planning is used to combine strategic planning and thinking in order to plan for an organization to be successful. She also highlights that the people within the organization, including the leadership, must have the “appropriate list of skills and personal attributes” as well as leadership skills in order to succeed (Graetz, 2002, p.460). Therefore, while the conceptual framework was used to develop the strategic plan for the RSF, there is no substitute for good rational thinking and effective leadership skills.

There are five steps that were undertaken in order to develop the strategic plan for the RSF. The first step was to conduct an internal scan of the organization. As discussed in the literature review, it is extremely important that the members of an organization, including the leadership are optimistic and ready for the planning process to begin. By setting clear expectations about key deliverables, the leadership was able to communicate with the Planner about what they hoped to achieve in the planning process. The second step was data collection, which involved learning about the key processes involved in strategic planning through

CONCEPTUAL FRAMEWORK FOR THE RSF'S STRATEGIC PLAN	
STEP 1: Conduct an Internal Scan of the Organization	Determine what will be undertaken as part of the strategic planning process in terms of deliverables (vision statement, mission statement, action plan). Scan to ensure that the leadership and membership of the organization is ready to engage in a strategic planning process.
STEP 2: Data Collection	Collect information on different methods and best practices for strategic planning. Solicit feedback from key stakeholders on what strategic issues may be facing the organization. Conduct an environmental scan to assess how other organizations with similar missions use strategic planning documents and tools.
STEP 3: Review Information and Identify Key Priorities	Review the information from data collection and identify the key priorities for the organization.
STEP 4: Formulate Strategies for Key Priorities	Formulate strategies to manage the issues.
STEP 5: Implement Strategies	Through SMART goals and an action plan that outlines key performance indicators and baseline information, implement the strategies.

Figure 7: Conceptual Framework for the Development of the RSF's Strategic Plan

conducting a literature review and speaking with key stakeholders on the issues that were facing the organization. By conducting an environmental scan of the strategic planning documents used by other nonprofits, the Planner was also able to review and assess if there were best practices within the industry.

Once data was collected, it was important to review and synthesize key information, and develop a list of key priorities for the organization. Strategies were developed to address the key priorities, which included setting goals, objectives, key performance indicators, accountabilities for tasks, and deadlines. The last step in this process is to implement the goals and action plan, taking key lessons into account and making adjustments where needed.

Section 3 of this paper will describe the mixed-methods approach that was used to develop the RSF's strategic plan. Each method was selected carefully and with consideration to the findings that would help to form the strategic plan. This section will describe the methods

used to collect data, how the data was analyzed, and the limitations that may exist within the methodology.

3.0 METHODOLOGY AND METHODS

Selecting the research methodology and methods to use in collecting data for the strategic plan required some important considerations. The methods to use had to be practical, effective and considerate of the RSF's resource constraints. A mixed-methods approach was used for this project and four main sources of data were collected. First, a literature review was conducted on the topic of strategic planning for nonprofit organizations in order to understand what the major themes and areas of disagreement in strategic planning literature were. This allowed for a careful assessment of the techniques that would work best for the RSF and lead to the development of a conceptual framework for their plan. Second, a stakeholder analysis was conducted in order to understand who the key players were in the RSF, and their degree of power and influence in the success of the organization. Third, key stakeholders, such as board members, volunteers, and donors were invited for focus group sessions in order to conduct a situational analysis on the strengths, weakness, opportunities and challenges/threats (SWOC/T) that the RSF faces. Lastly, the planner reviewed the public strategic planning documents for six non-profit organizations in Canada that focus on education and/or improving services in developing nations in order to ensure that the RSF was following similar best practices. Each of these methods is described in greater detail below.

3.1 METHODOLOGY

3.1.1 QUALITATIVE VERSUS QUANTITATIVE METHODS IN GATHERING INFORMATION

Trochim and Donnelly (2008) describe qualitative measures as measures “which are characterized by a nonnumeric format” (p.142). This includes “brief written responses on surveys, interviews, anthropological field research, video and audio data recording” (p.142), as well as participant observation and focus group interviews (Devine, 2002, p.197). On the other hand, quantitative data refers to a research tradition, which uses “numerical representation of some object” in which variables are measured using numbers (Trochim & Donnelly, 2008, p. 142). This method of research allows for “summarizing large amounts of data and research generalizations based on statistical estimations” (p.144).

While some argue that quantitative data has greater credibility, dependability, and conformability, a qualitative approach was applied to data collection for this strategic plan (Devine, 2002, p.199). As discussed by Devigne, qualitative methods are used where the “goal of research is to explore people's subjective experiences and the meanings they attach to those experiences” as these methods are “good at capturing meaning, process and context” (p.199). By collecting information from participants in a focus group setting through open-ended questions and a group discussion, greater insights were gained into the present state of the RSF and where key stakeholders envision the organization to be. By taking part in the focus group, rather than sending a quantitative based survey, it also helped key stakeholders to feel a level of engagement within the organization, which is important in developing motivation and sustaining interest in the RSF.

3.2 METHODS

3.2.1 LITERATURE REVIEW

Reviewing literature on strategic planning allows readers to draw out major themes, models, and ideas on planning and where opinions begin to diverge. Through an analysis of the literature, the strengths and weaknesses of various approaches were assessed in order to develop the conceptual framework used for the RSF's strategic plan.

3.2.2 STAKEHOLDER ANALYSIS THROUGH THE POWER VERSUS INTEREST GRID

Prior to planning and inviting participants to the focus group sessions, it was important to understand who the RSF's stakeholders were. After several discussions with the founders of the RSF, stakeholder identification and analysis was conducted on the various groups involved with the RSF. Eden & Ackermann's *power versus interest grid* helped to organize the "stakeholders on a two-by-two matrix where the dimensions are the stakeholders interest in the organization or issue at hand and the stakeholder's power to affect the future of the organization or issue" (Bryson, 2011, p.407-408). By conducting this step, stakeholders who had the most power or interest in the RSF were identified and added to the participant invitation list for the focus groups.

3.2.3 SITUATIONAL ANALYSIS USING THE FOCUS GROUP METHOD

The focus group method allows researchers to "obtain detailed information about attitudes, opinions, and preferences of selected groups of participants" in an interactive discussion, and is a helpful tool to use when conducting a situational analysis (Trochim & Donnelly, p.148). In order to conduct the focus group correctly, Greenblat & Duke's snow card technique was combined with McNamara's instructions on conducting an effective focus group session.

PARTICIPANTS

Based on the stakeholder analysis, there were three groups of stakeholders that were invited to participate. Group 1 consisted of Board Members, while Group 2 consisted of volunteers and interns that had been recruited from the University of Toronto's Munk School of Global Affairs. Group 3 was made up of donors. An email was drafted to explain the purpose of the study and outlined the criteria for participation. Allison forwarded this email to RSF's list-serv, and interested participants were able to respond back if they were interested in being a part of the focus groups. A copy of the email is included in Appendix A. Based on the interest and availability from potential participants two focus group sessions were held. Each session consisted of at least one stakeholder from each group, and there were four participants in each session. An agenda was sent out 2 days prior to each session.

LOCATION

The focus group meetings were conducted at the Toronto Reference Library in Toronto, Ontario, Canada. Each session was held on a Saturday afternoon in a meeting room. The length of each meeting was two hours.

SUPPLIES

Index cards were placed at each seat, along with markers and masking tape. Four pieces of chart paper were placed at the front of the room, with a title on each- strengths, weaknesses, opportunities, and challenges/threats.

FORMAT OF EACH SESSION

Each session began with an introduction from the Facilitator, which included asking each participant to review and sign the consent form, as per the guidelines of the Ethics application. An agenda was then distributed to each participant and reviewed by the Facilitator. The session began by discussing the strengths of the RSF. Each participant was given 10 minutes to brainstorm and write down his or her ideas on index cards. Next, each index card was taped to the strengths chart paper. The Facilitator went through the responses, and began to lead the group into a discussion on several of the themes emerging from the responses. With the guidance of the group, the facilitator began grouping the responses by common themes. This technique was next applied to weaknesses, then opportunities and lastly challenges/threats. The Facilitator then went back to each question to ask participants if there was anything else that they wished to add. Additional responses were recorded directly on the chart paper. At the end of the session, the Facilitator thanked participants and invited them to contact her if they had any other thoughts or information to add. Appendix B lists the questions that were asked during each focus group session.

3.2.4 ENVIRONMENTAL SCAN OF MISSION STATEMENTS

In order to ensure that the RSF's strategic plan was consistent with other non-profits with similar goals, an environmental scan was conducted. An environmental scan allows the organization to gather information "and turn it into knowledge that can be used in the strategic plan" (Mafrica, 2003, p.44). Through an index on the website Charity Village, 350 organizations classified themselves as focusing on international relief/development/peace. Using the safari search tool, this list of organizations was further refined to locate those organizations that focused on both education and international development. Through a review of the websites of this shortlist, 6 organizations were located in Canada with similar missions to the RSF. The websites of each organization were reviewed in order to address the following questions:

- 1) Does the organization have a strategic plan (a comprehensive document with mission and vision statement, action plans, timelines, goals and strategies)?
- 2) Does the organization have a mission statement?
- 3) Does the organization have a vision statement?

Based on the information received, the planner was able to tabulate the number of organizations that operated with a mission statement, a vision statement, and/or a formally adopted strategic plan. From reviewing the information, it was evident that all of the organizations had at the minimum a mission statement. Using the mission statement, the Planner conducted a content analysis, which is a "systematic analysis of text" (Bryson, p.151). It allowed for patterns and themes to be identified, in order to assess whether there were any key components included in these statements that were missing from the RSF's mission statement.

3.3 DATA ANALYSIS

3.3.1 THEMATIC ANALYSIS FOR FOCUS GROUP DISCUSSIONS

Data for the focus group was analyzed by examining common themes in the groups' discussion. During each session, inductive probing was used once each participant had answered the question to sort responses by theme and consolidate information regarding the strengths, weaknesses, opportunities and challenges/threats presenting the RSF (Guest, MacQueen, & Namey, 2012, p.17). Conducting this type of analysis with the entire group allowed for an enhanced discussion, and the data gathered in the session was then compiled into this report. In reviewing the data, further conclusions and assessments were drawn.

3.3.2 CONTENT ANALYSIS FOR ENVIRONMENTAL SCAN

Hsieh and Shannon (2005) argue that a summative approach includes latent content analysis, which means that there is greater focus on finding the underlying meaning of the words and content (p.1283). They explain that the first step in the summative approach is to identify the frequency of certain words in order to explore the actual meaning that they have (p.1285). Often times, planning documents are filled with jargon and words with little meaning. By using a content analysis and organizing certain key words (or codes) by theme, the planner was able to analyze the text and determine what words were frequently used in the mission statement, and what they implied.

3.4 PROJECT LIMITATIONS AND DELIMITATIONS

While this plan was formulated based on an understanding of the theoretical works and best practices described by many contemporary strategic planning professionals, there are several limitations to this study. First, quantitative data collection methods for identifying strategic issue would have enhanced this project. By collecting quantitative data from stakeholders on their perceptions of the RSF, and of the strategic issues that it was confronting, it may have been possible to triangulate the data, which would ensure that the data was objective and verifiable. One of the major limits to conducting a quantitative survey on these items was the small membership of the RSF. As a group made up of less than 50 members, with approximately 20 of those as active volunteers, board members and interns, the data would not have been statistically significant.

Due to time constraints, the strategies proposed in the section below have not been submitted to the membership at large, which means that there are still possible changes to be made. It is important that the membership be solicited for feedback before the strategic plan is submitted to the Board of Directors for approval, in order to ensure that there are no major gaps in the plan.

One area of future research that has emerged from the content analysis of other Canadian non-profits is the potential to conduct a case study. It could be quite beneficial to collect further data on organizations that have similar mandates to the RSF to learn about how their strategic plans have actually been implemented. Have these organizations found success in achieving their

goals? Have they had barriers that the RSF may also be at risk of facing? The issues that they may be grappling with may be the same issues facing the RSF in the near future, and it would be important to collect this data and determine as an organization how to mitigate any potential risks.

Section 4 of this paper will summarize the information that was collected from conducting a stakeholder analysis, focus group sessions with key stakeholders, and an environmental scan on how 6 other Canadian nonprofits use strategic planning within their organization.

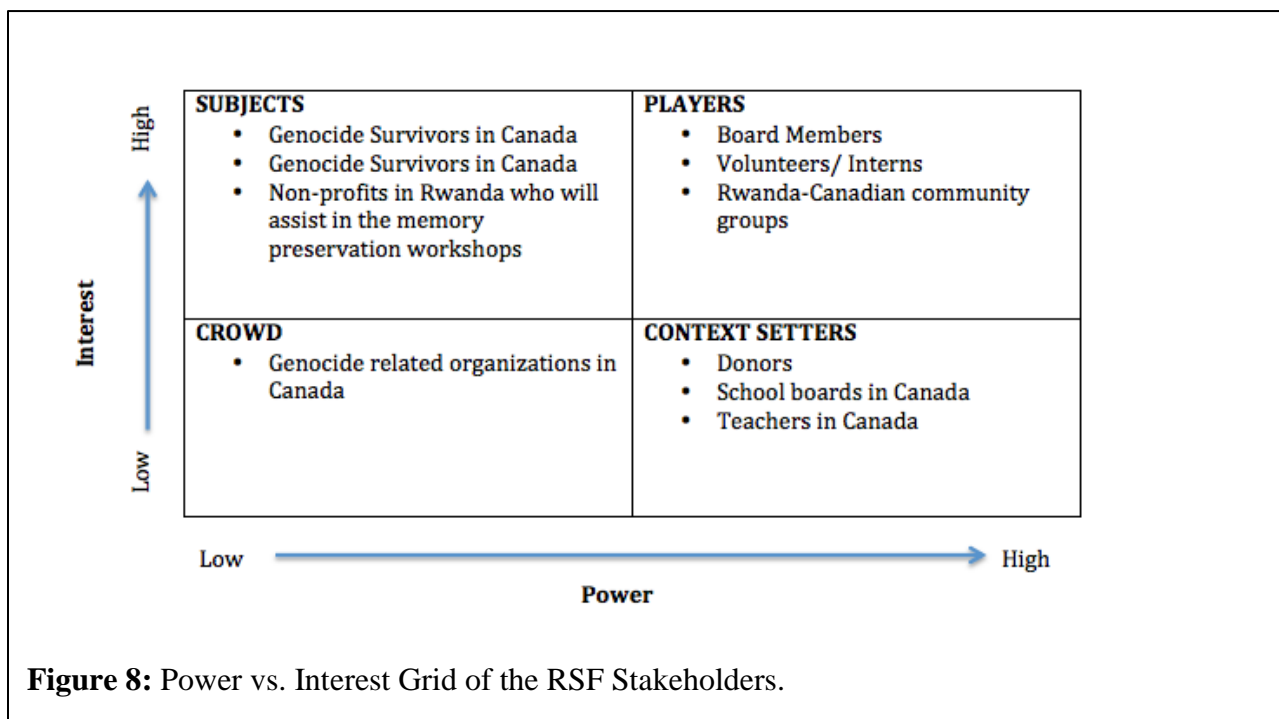
4.0 FINDINGS

4.1 INTRODUCTION

This section of the report summarizes the findings from the stakeholder analysis, focus group session and content analysis. Section 5 will discuss the findings in the context of overall synthesis and provide an analysis of the findings presented below.

4.2 STAKEHOLDER ANALYSIS

It is important that the RSF has ‘buy-in’ from stakeholders, which can be “any person, group, or organization that can place a claim on an organization’s (or other entity’s) attention, resources, or output, or is affected by that output” (Bryson, 2011, p.48). The RSF has several



stakeholders that have influence and play important roles in the success of the organization. In order to understand which stakeholders to include in the focus group discussions, the planner completed a power vs. interest grid with the assistance of the RSF’s founders. The results are summarized below.

4.2.1 PLAYERS

BOARD MEMBERS

As mentioned above, this is a newly established group for the RSF. These 5 board members range in age and professional experiences from various government and non-profit agencies. Their involvement with the RSF is based on their personal interest in the genocide and their desire to help its survivors. Input from these individuals is essential for the strategic planning process, as they will be evaluating the RSF by how well it lives up to its mandate. By

seeking their expertise early in the process, the Planner will be able to create a strategic plan that will benefit from the Board's input. Seeking their feedback will also allow them to feel more ownership over the organization, and have a deeper commitment to its success.

VOLUNTEERS/ INTERNS

Since the RSF has limited funding, the preliminary work for establishing the organization and executing its events has been left to the organization's volunteer base. This group is comprised of students, Rwandan-Canadian youth, and community members. The stakeholders in this group may have been interested in volunteering their time to the RSF for various reasons. They may be motivated by their desire to help a good cause, seek volunteer hours or internship opportunities, or be a relative or friend of the founders. This group will evaluate the RSF on the time commitment that is requested of them for various events and fundraisers, the experiences they gain, and how well they see the RSF achieve its goals.

RWANDAN-CANADIAN COMMUNITY GROUPS

Community groups such as the Canadian Association of Rwandan Youth in Toronto (CARY) are important collaborators for the RSF. This group consists of an extensive network of Rwandan survivors and the diaspora who play an active role in their community. They provide assistance to local refugee shelters, youth mentorship workshops, and networking events. By working with groups such as these, the RSF will be able to communicate its messages. The President of CARY, Imanzi Kayitare, also sits as a Board Member on the RSF.

4.2.2 SUBJECTS

GENOCIDE SURVIVORS IN CANADA

It is very important for the RSF to consider the interests of this group. Genocide survivors that live in Canada, and in particular in the Greater Toronto Area, will help to shape the agenda for the RSF. This group of individuals will also be instrumental in providing oral and written testimonies of their experiences during the genocide, as well as participate in programs with the Canada Rwanda Centre for Genocide & Peace Studies.

GENOCIDE SURVIVORS IN RWANDA

It will be very important to have "buy-in" from this group in order to successfully launch the RSF's memory preservation seminar in Rwanda. Emery's network of contacts in Rwanda will play a large role in encouraging survivors to register. From preliminary discussions, there has been a great deal of interest in these workshops, as genocide survivors hope to find an authentic way to tell of their experiences and move forward with their lives.

NON-PROFITS ON THE GROUND IN RWANDA

Non-profits in Rwanda, such as the Aegis Trust will prove to be important in the memory preservation seminars in Rwanda. Their expertise on the local political climate, knowledge memory preservation and reconciliation techniques, will be extremely important to the RSF's goals.

4.2.3 CONTEXT SETTERS

DONORS

The donors are important to the process as their willingness (or lack of) to provide funding will affect how the RSF can deliver its programs in Rwanda and Canada. Their interest in the organization may be based on their awareness of the genocide, passion for the cause, or a general philanthropic desire. This group may also have expectations on how their funding is used. While RSF's donations are not targeted to specific programs, major donors may want their money to go to certain initiatives over others. For example, they may be more interested in directing funds to work conducted in Rwanda, rather than curriculum development in Canada. Donors will evaluate the RSF on how well they achieve what they have promised to do, and therefore, creating organizational goals that are realistic will be very important. This way, the RSF can communicate what they have achieved in a very transparent and accountable way, and ensure that donors continue to be attracted to the organization.

SCHOOL BOARDS IN CANADA

Without the cooperation of this group, the RSF cannot design a curriculum that will be implemented. Allison's employment as a Consultant for the Toronto District School Board (TDSB) will be critical in connecting the RSF with individuals who may be able to provide information on the TDSB's requirements for new curriculum. The school boards interests may be focused on balancing the historical accounts of the genocide with the sensitivity of a young audience (students ranging in age from 15 to 18), and how individual schools will feel about revising class syllabus' to incorporate the new material. They will evaluate the RSF based on its ability to deliver the proposed curriculum in a timely manner, and whether they find that the final product is suitable for their school board's curriculum.

TEACHERS IN THE GREATER TORONTO AREA

It is important that teachers in school boards across the Greater Toronto Area stay are involved in the process. Through teaching seminars, they are able to learn about the RSF, and then go back and integrate the information that they have learned into their curriculums.

4.2.4 CROWD

GENOCIDE-RELATED ORGANIZATIONS IN CANADA

Genocide related organizations that operate within Canada, such as the Armenian Genocide National Committee of Toronto and the Holocaust Education Centre are important as it helps the RSF to create collaboration with other groups. They have similar interests and by working together, they are able to get their individual messages in an effective manner, as well as learn from one another on the best way to educate the public.

4.3 RESULTS OF THE FOCUS GROUP DISCUSSIONS

The focus group discussion regarding the strengths, weaknesses, opportunities and challenges/threats that the RSF faces is summarized below.

Strengths	Weaknesses	Opportunities	Challenges/ Threats
Leadership	Knowledge gaps	Connection with other survivor communities	Division amongst the diaspora communities
Diversity within membership	Internal communication	Recruiting volunteers looking for experience	External funding
Urgent and ongoing need for support from the Rwandan community	Busy and burdened survivor community	Tapping into community resources on post-traumatic stress disorder (PTSD) in Toronto	Politics of genocide (denial)
High degree of knowledge on genocide		Events and speaking engagements	Apathy for change
Passionate and involved members			
Lack of competition allows space for growth			

Figure 9: Summary of Focus Group Findings

4.3.1 STRENGTHS

LEADERSHIP

One of the most well discussed topics during the meeting was the leadership style of the RSF's founders, Alison and Emery. Adjectives such as resourceful, charismatic, and motivated were used to describe their approach to the organization. Both groups credited Emery's connection to the genocide and ease in speaking with students about his experiences as an asset to the organization. Emery's availability and willingness to adjust his schedule for speaking events was also seen as strength, as he often takes on last minute bookings.

DIVERSITY WITHIN MEMBERSHIP

The RSF has been able to bring together not only members of the Rwandan diaspora, but also community members with an interest on the topic of genocide. Their membership also includes active board members and volunteers from the Holocaust Centre of Toronto, as well as survivors of the Armenian genocide. By having a diverse group of members, they have been able to increase visibility and their presence at community events.

URGENT AND ONGOING NEED FOR SUPPORT FROM RWANDAN COMMUNITY

There have been calls for an authentic reconciliation process for genocide survivors, which are currently not being offered in Rwanda. The groups felt that the current process in Rwanda lacked legitimacy, and that a group offering services like the RSF would be in high demand.

HIGH DEGREE OF KNOWLEDGE

Within the RSF membership, there are several genocide survivors and social workers. Their knowledge and expertise on the genocide and reconciliation techniques are invaluable to the work that the RSF aims to complete.

PASSIONATE AND INVOLVED MEMBERS

As mentioned above, since donations are directed to programs and services, any work completed by the RSF membership is voluntary. The focus groups discussed their passion for the mission and the intangible motivations that drive their work forward. Regardless of whether one is a volunteer or a donor, they felt that the senior leadership of the RSF treated each member's contribution with the same degree of respect and recognition.

LACK OF COMPETITION ALLOWS SPACE FOR GROWTH

Since there are not many genocide related organizations in Toronto or Canada for Rwandans, the group recognized that there was a great deal of space for the RSF to grow.

4.3.2 WEAKNESSES

KNOWLEDGE GAPS

While the RSF membership is knowledgeable on issues regarding genocide and reconciliation techniques, there are several knowledge gaps. There are no fundraising experts within their internship or volunteer program, which means that their fundraising strategy is limited by the experience of the group. The group discussed the need for volunteers with a fundraising and public relations background, so that the RSF could increase awareness and raise money using non-traditional forum, such as social media. They also discussed the need to recruit board members and volunteers with business and financial knowledge in order to help the RSF with bookkeeping and long-term financial planning once the fundraising revenue had increased.

INTERNAL COMMUNICATION

Many of the focus group participants were unsure of the priorities of the RSF's senior leadership. The group felt that the RSF's mission is ambitious, and while they were passionate

about seeing it through, they were not sure what the priorities were, or the order in which goals would be tackled.

BUSY AND BURDENED SURVIVOR COMMUNITY

The group also discussed how busy the genocide survivor community in Toronto is. They are part of other groups and juggle their time with RSF between other competing priorities such as family and work. The group discussed that these survivors may not necessarily have the time to provide advice on programming and services. They also discussed factions within the survivor community in Rwanda who may not see value in participating in reconciliation and memory preservation workshops, which could hinder the RSF's ability to have participants at the events.

4.3.3 OPPORTUNITIES

CONNECTIONS WITH OTHER SURVIVOR COMMUNITIES

One major opportunity identified by the group was that the RSF is able to connect with other survivor communities in Canada and the Greater Toronto Area. There are research discussions and community events that could be planned between genocide survivors in the Rwandan, Jewish, and Armenian communities. These conversations would facilitate a dialogue between these groups. It would also help the RSF to learn about the best practices of groups with similar mandates, and learn from their experiences as nonprofits in Canada. The focus group also saw opportunities in the RSF connecting and collaborating with national and international nonprofits on the Rwandan genocide.

RECRUITING VOLUNTEERS LOOKING FOR EXPERIENCE

The focus group participants saw an opportunity within RSF's weakness of knowledge gaps. Due to a high youth unemployment rate in Canada right now, there are more young people than ever who have graduated from universities and colleges and are looking to gain experience in order to become competitive in the job market. The participants felt that recruiting graduates from programs such as graphic design, fundraising, and public relations, the RSF would be able to increase revenue and public visibility, while youth would have the opportunity to gain experience, create a portfolio, and make a difference.

TAPPING INTO COMMUNITY RESOURCES ON POST-TRAUMATIC STRESS DISORDER (PTSD) IN TORONTO

One missed opportunity identified by both groups was the chance to work with groups specializing in PTSD in Toronto. These groups could help the RSF membership in planning the workshops in Rwanda and possibly connect them to community resources.

EVENTS AND SPEAKING ENGAGEMENTS

The groups saw an opportunity to further engage members of the RSF, such as Emery, in speaking tours and events. They recommended creating a network for speakers on genocide issues that could better market itself to the schools, or work with an existing organization to be part of a roster.

4.3.4 CHALLENGES/THREATS

DIVISION AMONG DIASPORA COMMUNITY

There is a division amongst the Rwandan community in Toronto about the best way to preserve memories of the genocide and honour those who passed away. While an overwhelming majority supports the goals of the RSF and their plans, there are those amongst the diaspora community in Toronto that would rather focus on the future than preserving the memory of past events. Even in Rwanda, there are many victims of the genocide who would rather not focus on the past, and instead keep moving forward in their daily lives to survive. It will be the task of the RSF to emphasize the importance of preserving history and authentically healing in order to prevent future tensions and atrocities in Rwanda.

EXTERNAL FUNDING

One of the major challenges that the RSF faces is in fundraising for its programs and services. The RSF is a non-profit, and therefore relies on donations in order to meet its goals. The challenge for the RSF will be to find new sources of funding in an increasingly competitive environment, in which there are a lack of grants and donors with expendable income. The RSF must compete with other nonprofits for financial resources and time. The RSF's inability to receive start-up funding from major corporate donors or government has impeded its ability to launch the organization. Many of the participants felt that money was needed to get things going.

POLITICS OF GENOCIDE (DENIAL)

Similar to those in the diaspora community who do not wish to dwell on the genocide, there are those that deny that the Rwandan genocide took place, or that over 800,000 individuals were killed. One of the two focus group sessions discussed opposition to the official death count in Rwanda, based on the fact that many bodies were never recovered.

APATHY FOR CHANGE

It seems that at this particular moment in human civilization, at any given time, there are numerous global conflicts taking place. The groups discussed that as much as globalization has connected the world together, it's easy to think that donating or volunteering with organizations such as the RSF will not make a difference. This type of bad news fatigue or donor apathy can be dangerous to organizations such as the RSF as it will have a direct impact on the public's willingness to donate. For those watching the news each night, there seem to be too many problems across the world, and many who find a cause to champion on may have a 'one topic at a time mentality' or a focus on a recent issue.

4.4 ENVIRONMENTAL SCAN AND CONTENT ANALYSIS

4.4.1 ENVIRONMENTAL SCAN OF DOCUMENTS USED BY OTHER NONPROFITS

Through an assessment of information provided by the six organizations, it was found that while all organizations had a mission statement, they did not all use vision statements or a formal planning document to guide their work. The results are summarized below.

Organization	Mission Statement	Vision Statement	Strategic Planning Document
Pencils for Kids	•	•	•
Peace Brigades International	•	•	•
Love is the Answer	•		
Nukoko Education	•		•
Ye'ahavata	•	•	
The Sentinel Project	•		
<i>Total</i>	6	3	3

Figure 10: Summary of Environmental Scan Findings

From the chart above it is evident that half the organizations sampled have a vision statement or strategic planning document. While two of the organizations referred to their documents as action plan or objectives and shared this information publicly, one organization preferred to keep their strategic planning document as an internal tool. By conducting this analysis, it became evident that not all organizations have a vision statement or formal strategic plan. Instead, each organization uses a combination of documents that serve their purposes best.

4.4.2 CONTENT ANALYSIS OF MISSION STATEMENTS

By using a summative approach, The Planner assessed the appropriate language that organizations use to describe their missions, which are often the result of an unpleasant reality of war and poverty. By adopting a similar language in the revision of their mission statement, the RSF could strengthen its messaging. The Planner reviewed the mission statements of each organization and picked common words and phrases that were mentioned in the mission for multiple organizations. Through the process of coding, the Planner was able to find 16 words or phrases that were used across more than one organization. They are listed in Figure 3 below. The use of these words demonstrates that positive verbs are used to describe the organization and what it is attempting to do. This will be discussed in greater detail in the next chapter.

Local	Peace	Promote
Conflict	Programs	Social
Education	Assist	Sustainable
International	Community	Worldwide
Initiatives	Development	
Non-violent	Empower	

Figure 11: Content Analysis of Mission Statements

The next section of this paper will synthesize key information and discuss the significance of the research findings. The section will help to answer several key research questions about how best to align strategy with goals, an action plan, performance objectives and programs, as well as address what a strategic plan truly is and what the most important elements within it are. The next section will also include the mission statement, vision statement, and strategic plan developed for the RSF.

5.0 DISCUSSION AND ANALYSIS

In order for a strategic plan to be well thought out and executed, there are several factors that must be in place. While the literature review presented several methods to use in collecting information, formulating goals and strategies, and implementing the plan, it is important to remember that the tools used can only be as effective as the information gathered and the considerations that are made in implementation. The section below will discuss the results of the project, and present the plan developed for the RSF. The plan is a draft framework of an action plan for the RSF based on the strategic issues identified. However, these objectives, measures, and timelines will require further discussion by the RSF Board before they are formalized and accepted by the organization.

5.1 GOOD LEADERSHIP

Throughout the literature review and SWOT, one common theme that was apparent is that there is no substitute for good leadership. A good leader can make the difference between a good plan and a well-executed plan. An organization cannot undergo an effective planning process without a visionary leader who can lead in the transformation and rally stakeholders behind them. The leader is also able to delegate responsibility, empower others, and share their commitment to the process. While all the techniques and methods of collecting stakeholder feedback have their strengths and weaknesses, it makes less of a difference than how a leader engages the organization's stakeholders, and what the leader does with the information collected.

Within the RSF, it is evident that the volunteers and board members have a high level of respect for the founders, Alison and Emery. Both are extremely committed individuals and their passion for what they do is infectious to those around them. Both are comfortable with learning from the experiences of the collective group, and yet also comfortable with making decisions and sticking to them. The challenges that the RSF faces are mainly external, as the internal environment is in a very prime condition to review and adopt a transformational strategic plan.

5.2 ENGAGED VOLUNTEERS

From the literature review, a second prevalent theme was that in order for a plan to be successful, it needed the participation and commitment of staff, volunteers, and stakeholders. This group of individuals needs to be involved with the initial consultation stage to determine where the organization is and where it should be going. The leadership of an organization needs buy-in from this group, as they can become one of the largest obstacles in its implementation. This group needs to understand the vision and mission of the organization, as it will be connected to everything that they do for the organization.

As mentioned above, the Board Members, as well as the RSF event volunteers and interns are very committed to the organization. They have been engaged in the planning process, and have expressed a commitment to implement the plan. Once the Board approves the plan, the leadership of the RSF needs to ensure that the plan is well distributed to this group, so that these individuals understand all of the aims of the organization in order to help in implementing the plan successfully.

5.3 OPTIMISM

One of the messages from the content analysis as well as texts such as Bryson and McNamara is that there must be an air of optimism within the organization. The leadership and staff/volunteers must be excited about the planning process and what the implementation of the plan will mean for the organization. They must maintain a positive attitude and be flexible as plans change in order to meet the goals of the organization.

From reviewing the adjectives and verbs used the mission statements of the six Canadian non-profits, it is evident that the words used are positive. While all the organizations focus on causes that have come out of poverty and conflict, the message of the organization is a positive one. Rather than filling a mission statement with historical information to describe what atrocities have been committed in the past, the mission statements are future oriented, non-political, and optimistic.

5.4 UNDERSTANDING OF STRATEGIC ISSUES

An organization undergoing a strategic planning process must have a good understanding of the strategic issues that it faces. While the literature review went into a number of great ideas on techniques to use, it ultimately comes down to two factors: the stakeholders consulted and the discussions that were conducted. It is important that key stakeholders that are involved within the planning process. They have insights and experiences with an organization that management could not possibly have. Management can sometimes be too far from the ground to see what the challenges may be. For this reason, it is important to take the time to truly understand the strengths, weaknesses, opportunities and challenges or threats that an organization faces. By having an open and honest dialogue with staff on these items, the leadership can begin to develop an effective strategic plan.

The focus group sessions were extremely important to the strategic planning process of the RSF. It was important to solicit feedback from volunteers, interns, and board members, as it helped the planner to understand the issues, as well as each group. Each of these groups may be working on different task, and for many this was the first opportunity that they actually interacted with one another. By having an open and honest dialogue with the group, they were able to identify the key strategic issues confronting the RSF, and discuss a plan of action for each challenge or implementation barrier.

5.5 GOOD PLAN OF ACTION –SMART GOALS

While there were several methods to developing a strategy for the strategic issue, the most effective way is to develop action-oriented and time-sensitive goals. By making goals that are specific, measurable, attainable, relevant and time-sensitive (SMART), the RSF can develop plans based on the strategic issue that can actually be measured and assessed for performance. SMART goals also help in determining how to overcome implementation barriers. Below, three major goals for the RSF are identified, along with the objectives, key performance indicators, baseline, responsibility, and deadlines in order to align the “strategy with the performance of processes” (Alogan and Yetis, p.677).

5.6 RSF'S STRATEGIC PLAN

VISION

A world free of civil conflict,
violence, and genocide

MISSION

As leaders in genocide education and prevention in Canada, the Rwanda Survivor's Foundation (RSF):

- Advances and disseminates knowledge about the genocide through curriculum development for Canadian students, providing exchange opportunities, and partnering with Canadian institutions to further research efforts
- Preserves the memory of those who suffered in the genocide against the Tutsi through the Survivor Memory Initiative and the establishment of the Canada Rwanda Centre for Genocide and Peace Studies

GOAL #1	OBJECTIVE	STRATEGY/ CRITICAL SUCCESS FACTORS	KEY PERFORMANCE INDICATORS	RESPONSIBILITY	BASELINE	DEADLINE
Address Knowledge Gaps within the Membership	Recruit 2 new Board Members by May 1, 2017	Develop a board recruitment strategy	# of websites that post vacant board post	RSF Board Members	3 websites	December 31, 2016
			# of individuals who respond to posting		10 interested individuals	
	Recruit 5 members with experience in fundraising management by May 1, 2017	Contact Humber's fundraising management program	# of meetings held with the program director to assess whether the RSF could be a potential co-op placement for students	RSF Board Members	2 meetings	December 31, 2016
			# of students that express interest in completing their co-op placement with the RSF		10 interested students	
	Recruit 5 members with experience in public communications by May 1, 2017	Contact Seneca's public relations program with volunteer postings	# of meetings held with the program director to assess whether the RSF could be a potential co-op placement for students	RSF Board Members	2 meetings	December 31, 2016
			# of students that express interest in completing their co-op placement with the RSF		10 interested students	

GOAL #2	OBJECTIVE	STRATEGY/ CRITICAL SUCCESS FACTORS	KEY PERFORMANCE INDICATORS	RESPONSIBILITY	BASELINE	DEADLINE
<p>Improve internal communication</p>	<p>By April 1, 2017, RSF volunteers should be actively engaged in the organization's activities</p>	<p>Engage volunteers through multiple methods throughout the year</p>	<p>One annual general meeting is held in 2016</p>	<p>RSF Board members</p>	<p>Meeting is held and 75% of membership attends</p>	<p>March 1, 2017</p>
			<p>RSF electronic newsletter is created and sent to membership list on upcoming events and initiatives</p>		<p>Newsletter is sent out every other month</p>	

GOAL #3	OBJECTIVE	STRATEGY/ CRITICAL SUCCESS FACTORS	KEY PERFORMANCE INDICATORS	RESPONSIBILITY	BASELINE	DEADLINE
Develop a fundraising strategy	Raise \$100,000 by July 31, 2017 by launching a fundraising strategy that incorporates social media and targets individual donors	Organizing the RSF to approve strategic documents	Vision statement created	RSF Board Members RSF Founders	Creation of documents	July 1, 2016
			Mission statement revised			
			Organizational charter created			
			Creating brand image, logo, marketing messages, and slogan			
			Board members introduce motion to approve documents			
			One annual general meeting is held in 2016			
			RSF electronic newsletter is created and sent to membership list			
		Create a virtual presence for the RSF on social media	# of monthly hits on RSF website	RSF Volunteers and Interns	100 hits per month	
			# of times monthly that the RSF organization profile is viewed on LinkedIn in a		50 hits per month	
			# of new friends on Facebook		50 new friends each month	
			# of new followers on Twitter each month		25 new followers each month	
			# of tweets the RSF puts out on Twitter in a month		15 tweets per month	
			# of "re-tweets" from followers on Twitter		50 're-tweets' per month	

			per month				
			# of new followers on YouTube in a month		25 new followers per month		
			% of increase in fundraising revenue		\$1,000 per month		
	Increase fundraising events per year			# of events held each month	RSF Volunteers and Interns	1 event per month	October 1, 2016
				# of individuals invited to events		100 individuals	
				# of individuals who attend		50 individuals	
	Secure funding from three corporate sponsors/non-profit partners by January 1, 2017	Target corporations with similar interests for sources of funding		# of corporate sponsors/ non-profit partners contacted	RSF Board Members	5 per month	December 31, 2016
				# of invitations received for proposal submission		2 per month	
				# of presentations conducted for sponsorship		1 per month	

GOAL #4	OBJECTIVE	STRATEGY/ CRITICAL SUCCESS FACTORS	KEY PERFORMANCE INDICATORS	RESPONSIBILITY	BASELINE	DEADLINE
Increase the RSF's visibility and capacity for knowledge dissemination	By July 1, 2017, partner with one post- secondary institution in Canada on a memory preservation project	Develop an initial proposal for post- secondary institutions in Canada that offer programs or degrees in peace and conflict studies or refugee studies.	# of institutions contacted	RSF Volunteers and Interns RSF Founders	7 institutions	April 2017
			# of institutions that follow up for further information		4 institutions	
			# of meetings held with Program Heads on the future of the project		2 institutions	
	By July 1, 2017, deliver 10 workshops to secondary schools and post-secondary institutions across Ontario	Develop promotional material based on the findings of the memory preservation project in Rwanda and distribute to secondary and post- secondary institutions in Canada	# of institutions contacted	RSF Founders	30 institutions	April 2017
			# of institutions who agree to hold event		10 institutions	
			# of students per sessions		100 students per session	
	By April 2018 partner with the Canadian Museum for Human Rights (CMHR) on an initiative that focuses on the Rwandan Genocide	Initiate a dialogue between the RSF and the CMHR program staff on possible joint initiatives that would bring focus to the Rwandan Genocide and promote the CMHR	# of emails exchanged	RSF Board Members	10 emails exchanging information	December 2017
			# of teleconferences held		4 teleconferences for planning of joint initiative	
	By December 31, 2018 secure space for the Canada Rwanda Centre for Genocide & Peace Studies	Develop a space-needs assessment to determine where the centre should be located	# of members in committee	RSF Board Members RSF Founders	5 committee members	September 2017
			# of times committee meets in a month		Once per month	
# of suitable office spaces located			5			

Section 6 of this paper presents the senior leadership of the RSF with three options for implementing the strategic plan. Each option carefully considers the implications of adopting one approach over another. The section ends with a recommendation on the best course of action, which is based on considerations about practicality, ease of implementation, resources, and time.

6.0 OPTIONS TO CONSIDER AND RECOMMENDATIONS

6.1 INTRODUCTION

The recommendations presented below are related to the goals outlined above, and are based on the culmination of strategies discussed in the focus group sessions and through lessons learned in the literature review.

6.2 OPTIONS TO CONSIDER

6.2.1 OPTION ONE – MAINTAIN STATUS QUO

The first option that the RSF is presented with is to do nothing for the present time. The RSF does not currently operate under a strategic plan, and has still experienced success in building relationships with program partners and organizing events for the Rwandan diaspora in Toronto. While it would help to formalize their process, a strategic plan does not necessarily equate to fulfilling the organization’s mission.

6.2.2 OPTION TWO- ADOPT THE STRATEGIC PLAN PRESENTED IN REPORT

The second option that the RSF has is to adopt the strategic plan presented in this report. The plan presented provides recommendations for goals, objectives and strategies based on findings from the literature review, focus groups, and environmental scan. A vision statement and revised mission statement were also prepared. The vision statement provides a description of what could happen if the RSF meets its intended goals. By revising the mission statement and grouping the activities of the RSF under the two major themes- education and memory preservation, it makes the mission of the organization easier to understand, as well as provides a link between the goals and their activities. One of the major discussions in the focus groups was on the lack of understanding on the organization as a whole, as volunteers and interns were only involved with certain projects and initiatives.

6.2.3 OPTION THREE- CONSULT WITH STAKEHOLDERS ON STRATEGIES AND REVISE PLAN

McNamara cautions that “strategic plans are rarely implemented as expected” and that it is okay to change the course of the plan if there are changes to the organization’s environment or the resources needed for implementation (p.124). Since the initial focus group sessions, over a year has passed, and in that time, perceptions and ideas that stakeholders may have about the organization may have shifted. While there has been discussion with the RSF founders to ensure that the plan presented above is still relevant, it could be beneficial to present the plan to the RSF’s stakeholders in order to ensure that the strategic issues identified were formulated into strategies that are realistic for the organization to implement.

6.3 RECOMMENDATIONS

Option Three would lead to the implementation of a plan that would have the greatest likelihood to success. By soliciting feedback from stakeholders, such as Board Members and volunteers, revisions can be made to the strategies, or new tactics could be added to the plan. It is very important to have “buy-in” for the strategic from all members of the organization. This course of action would be the best method to ensure that stakeholders are engaged in the process, and that a realistic implementation strategy is used for the plan.

7.0 CONCLUSION

The report presented above has outlined several goals for the RSF, along with strategies, key performance indicators, and timelines to follow in order to achieve their objectives and measure performance. The strategic plan presented aims to support the organizations mission of becoming leader in the memory preservation efforts of Rwandan genocide survivors and expand education and research efforts in Canada.

From the information presented in the literature review, focus group and the environmental scan, it is evident that while a formal strategic plan helps to organize and align the organizations objectives with a real plan of action, a strategic plan is not a substitute for strategic thinking or leadership. Even if the RSF decides not to formally adopt the strategic plan, the impact of strategic thinking and assessing the organizations operations is an important exercise to undertake.

If the RSF decides to adopt the plan, they must ensure that there are sufficient resources in place for effective implementation. The plan was designed with cost effective approaches in mind in order to conserve their fundraising revenue for core activities. The strategies presented above are time-intensive, and while it may require volunteers and board members to give more of their time in the next 6 months, it will undoubtedly help the RSF in achieving its goals.

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APPENDIX A: FOCUS GROUP INVITATION

Hi Everyone,

My name is Preeti Purba and I am graduate student with the University of Victoria. In order to fulfill the requirements for my Master's program, I am currently completing a project with the Rwanda Survivors Foundation (RSF). This project will involve leading a strategic planning process for the organization in order to ensure that it reaches its mission.

I am currently recruiting active volunteers and recent donors to take part in a focus group session, where we will discuss the RSF's strategic issues and how to overcome them in order to achieve its mission. In order to be eligible for this session, you must:

- Be 18 years of age or older
- Be familiar with the mandate of the RSF
- Have volunteered or donated to the RSF within the last 12 months
- Be available to attend an in-person focus group session, which will be held in Toronto during the month of July. The location is to be confirmed, but will be a Toronto Public Library that is easily accessible by public transportation
- Have no personal relationship with the founders of the RSF (familial relation or close friendship)

Potential participants should be comfortable expressing their ideas in a small group setting and therefore, a good comprehension of the English language will be important to this process.

Beverages and snacks will be provided during the session.

If you are interested in participating, please contact me at purbapreeti@gmail.com by August 2, 2014.

Thanks so much!

APPENDIX B: FOCUS GROUP QUESTIONS

1) Strengths (internal)

Question: *In your opinion, what are the strengths of the RSF?*

Guiding questions:

- What are the strengths of the organization?
- What is the RSF doing well?
- What resources or capabilities allow them to meet their vision/mission?

2) Weaknesses (internal)

Question: *In your opinion, what are the weaknesses of the RSF?*

Guiding questions:

- What is the RSF doing poorly or struggling with?
- What are the internal weaknesses and deficiencies in resources and capabilities that may be hindering the organization's ability to accomplish its mission/mandate?

3) Opportunities (external)

Question: *In your opinion, what opportunities can the RSF take advantage of to move further along in their mission?*

Guiding questions:

- What opportunities will most dramatically enhance the quality the programs that the RSF wishes to deliver?
- What key environmental/market factors may positively impact the their plans?
- What are some areas of untapped potential?

4) Challenges/Threats (external)

Question: *In your opinion, what are the current challenges or threats that the RSF faces?*

Guiding questions:

- What are the key challenges/threats to the quality of programs of the RSF?
- What are other organizations doing well that we are not?
- What future challenges could affect the programs of the RSF?