

VISION AND STRATEGY AT A GLANCE

MISSION AND VISION

- Why do we exist and where are we going?
- What change will we take responsibility for in the world?

DISCOVERY 1

Engage with
Stakeholders
(interviews,
focus groups,
surveys)

DISCOVERY 2

Landscape and
Performance
Analysis

REFLECTION 1

What's the
opportunity we
need to seize?
What's our next
3-5 year
destination?

REFLECTION 2

What are our 3-
4 strategic
themes? What
gets our
attention for the
next 3-5 years?

REFLECTION 3

What's the
result expected,
the key
measures, and
objectives for
each theme?

EXECUTION 1

Sharing the plan
for
understanding

EXECUTION 2

Who is doing
what by when
and how much
will it cost? This
is the operating
plan

Elements of a Full Strategic Planning Process

The process is adapted to meet the unique needs of the organization

Milestone	Key Question for Milestone	In Other Words...
Getting Prepared	What is our mindset?	What do we know about the terrain?
Reflection/Research	What do we need to learn?	
Evaluating the culture	What is our ‘operating system’ and is it healthy?	
Mission	What is our purpose?	Why are we doing this? Where are we going?
Vision	What do we want to accomplish?	
Motto	How do we make it memorable?	
Value Proposition	What is our unique contribution?	
Opportunity Statement	What do we need to seize at this moment?	
Strategic Themes	What do we need to focus on?	What is most important?
Result Expected	What does success look like?	
Urgency Goal	What must be done now?	
Culture Enabler	What do we need to change about ourselves (practices, behaviors)?	
Objectives	What must we do to achieve the result?	How are we getting there?
Initiatives	What specific tasks do we need to accomplish?	
Accountability	Who is going to carry out the tasks and how will we know it’s making a difference?	
Multi-year Operating Plan	What’s the medium-term view?	Will we be safe?
Financial Plan	How is it going to be resourced?	
Change Management	How do we help our people?	
Communication Plan	What do our people need to hear and how often?	

Key Elements of Our Strategy Development Process

- 1) **Participation and Ownership:** A strategy is only effective if the people who carry it forward believe in it. That's why our process is deeply participatory, engaging board members, staff, and broad stakeholders in meaningful dialogue. This ensures that the plan reflects diverse perspectives, fosters alignment, and promotes lasting ownership throughout the organization.
- 2) **Clarity and Focus:** Mission, vision, and values serve as enduring guideposts for an organization, but they are not designed to chart a 3–5 year course. To set that direction, we help organizations develop an *opportunity statement* and an *aspiration statement*. These elements bring clarity and focus to the strategic plan.
- 3) **Choices:** Effective strategy requires disciplined choices. Through collaborative exercises, Chisel strikes a balance between building consensus and guiding the team to clear, focused decisions—always grounded in thoughtful analysis and discernment.
- 4) **Roadblocks:** Defining where we want to go is only part of the journey. A strong strategy also identifies the obstacles that could prevent us from reaching our destination. Uncovering these challenges and designing practical ways to overcome them is central to our approach.
- 5) **Unique Contribution:** The best strategies are often simple, but never simplistic. They emerge from a clear-eyed understanding of an organization's strengths and weaknesses in relation to its environment. By rooting strategy in this discovery, we help organizations harness their unique advantage with confidence.
- 6) **Our Role:** We believe the wisdom needed for a successful strategy already lives within the organization. Our role is to walk alongside leaders and teams as a coach, guiding decisions that resonate, inspire, and foster lasting ownership of the plan.
- 7) **From Plan to Action:** A strategic plan must be more than a document—it must drive action. We help organizations translate their strategy into an operating plan, with measures and rhythms of accountability. This creates a living framework that guides daily decisions, adapts to change, and keeps the organization focused on what matters most.
- 8) **Lean and Lasting:** We pursue both quality and efficiency, flexibly designing engagements that move at the pace of the organization, often completing them within four months, and culminating in a succinct, five-page plan. We are committed to a nimble, collaborative, and relevant process, as well as a strategic plan that leaders continue to use and reference long after the initial excitement of the engagement has passed.

Our Approach

Our approach is human-centred and collaborative, integrating JEDI (justice, equity, diversity, and inclusion) practices and Truth and Reconciliation principles at every stage of the process.

- Ninety percent of our consulting work is focused on helping nonprofit organizations with strategic planning. We've drawn from industry best practices and developed a proven process that specifically addresses nonprofits' aspirations, needs and challenges.
- We leverage a toolkit of methods to help surface feedback and identify organizational opportunities, challenges, and priorities. In all our consultations, we strive to engage as broadly and deeply as possible, especially being mindful of stakeholders who may be on the margins.
- We create safe spaces for candid conversations while clearly capturing actionable insights. See our document outlining [our approach to inclusive conversations](#), which anchors all of our engagements.
- We utilize online and in-person tools to avoid groupthink and ensure that there are multiple accessible ways of providing feedback and raising concerns.
- Throughout the process, including implementation and rollout, we incorporate practices that highlight diverse voices and stories while increasing engagement.
- Our process culminates in an intensive facilitated retreat with a collaboratively selected planning team (typically consisting of key board members, senior leaders, and staff), where significant decisions are made.
- We aim for the strategic planning process to be productive, collaborative, and joyful from start to finish. Regular updates are provided throughout the engagement.