

Presentation for AFOA  
Band Administrator's Workshop  
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Saskatoon Inn

# What is a Annual Report or Strategic Plan?

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- A Strategic Business Plan is an internal document that (1) outlines an organization's overall direction, philosophy, and purpose, (2) examines its current status in terms of its strengths, weakness, opportunities, and threats (SWOT Analysis), (3) sets long-term objectives, and (4) formulates short-term tactics to reach them.
- The Annual Report can also include Audited Financial Statements and detailed operational information.

# Why should your organization do a Strategic Plan?

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- It may be the single most important project your First Nation will undertake.
- There are many initiatives that are important to an organization, such as policy development, budgeting process standardization, business process improvement, etc. What makes strategic planning so important is that it captures these important initiatives and it makes them your key objectives.

# Why should your organization do a Strategic Plan? (2)

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- If there is a common goal or objective that you want to implement throughout the entire organization, you can add it into each department.
- Without planning there is little movement in an organization. If you do make progress, it is usually uncoordinated and not part of an overall plan.
- With a strategic plan, improvements are made throughout the organization and is a coordinated effort seen consistently throughout all programs.

# Why should your organization do a Strategic Plan? (3)

- ❑ INAC has considered a Strategic Plan as one of the factors in their General Assessment for new funding arrangements
- ❑ When considering a strategic plan, do not delay. Every year wasted is a year that you could have achieved significant improvements to your organization.
- ❑ Including the First Nations Audited Financial Statements in your Annual Report is an integral way of being accountable and transparent to your membership and funding agencies.

# Ahtahkakoop's "Original Strategic Plan"

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- Our original Strategic Plan consisted of two hand written pages of projects that we wanted to accomplish. This list included a new band hall, a new store, a renovation to arena, etc.
  - ▣ Within two years, we finished all but two of the fifteen items on the list. With this in mind, the plan does not need to be elaborate.
- We learned two valuable lessons from this early planning tool.
  - ▣ 1. Planning is not just about constructing buildings or funding economic development ventures. It is about ensuring that the governance and accountability framework is in place and that constant improvements are being made. This will ensure that a solid foundation is in place for these types of projects to go forward and to succeed.
  - ▣ 2. Have a plan.

# Getting started

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- Where do you start?
  - Plan it out
  - Hire a knowledgeable facilitator
  - Identify a budget
    - Be prepared to fund your plan internally
    - Don't rely on federal funding
  - Plan out 2-3 years
  - Identify a management team to oversee the process and to share the workload
  - Stick to timelines
- Statistics
  - Where possible, you need to measure results against prior year data.
  - We found that our data and database management was inadequate.
  - We are now utilizing computerized database programs for most of our departments
  - We hired Doug Elliot of Sasktrends Monitor to pull out key data from the Census Report. This provided us with data which allowed us to measure and compare. We have also developed our own surveys that allow us to poll our membership. This gives us valuable information when formulating our goals and objectives each year.
  - We tried to formulate a strategy for our membership to embrace the census, rather than reject it. This proved to be a great challenge as people on our First Nation have for years had been told to not participate or try to “fool” the Census workers.

# Getting started (2)

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- The leadership needs to lead the process and have the patience to see it through to the end
  - ▣ With this in mind, the process never ends. Each year the process starts over again. New objectives are formed and some are continued.

# Process

- SWOT Analysis
- Vision and Mission Statements
- Chief and Council Long Term/Over Arching Objectives
  - Once the Chief and Council Objectives were formulated, we were then able to create integrated management objectives, which then gave each department a starting point for their departments goals and objectives
- Management is now responsible for establishing goals and objectives for their departments using the integrated management objectives
  - The key to setting up these goals is to ensure that the goals are measurable and to use existing data when available.
  - The goals and objectives need to have action items and timelines, to show that they are attainable and well thought out. This also allows management to track where progress is being made and where it may be stagnant
  - This is a period of collaboration between department managers and their respective boards/committees and also with staff. We have found that more input at this stage is critical to get “buy in” from staff and boards/committees

# Process (2)

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- Once the Band Administrator and the management team are satisfied with the goals and objectives as proposed by the department managers, they are presented to Chief and Council for their approval.
- ▣ If Chief and Council want to see changes, they are sent back to management. Once they are approved, the editing and designing can then be finalized and, finally, be sent to printers

# Process (3)

- The various steps that we have used to communicate the plan were as follows:
  - ▣ Band meetings to present the plan
  - ▣ Meeting of all staff members,
  - ▣ Hand deliver to all band houses,
  - ▣ Mass Mail-out to off reserve band members.
  - ▣ Mail to key stakeholders of our organization (funding organizations, banks, business partners, prospective funding agencies, and government)

# Buy In from Leadership, Staff and Membership

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- The Chief and Council are integral to the process. They approve the funds and the goals and objectives. They also set out the direction of the organization by actively participating in the Mission/Vision Statement exercises and the SWOT analysis.
- Management is responsible for proposing the goals and objectives for the organization, and then ensuring that they are met. They map out exactly how they intend to meet their objectives. They are held accountable for their results.

# Buy In from Leadership, Staff and Membership (2)

- The staff members are responsible for accomplishing many of the objectives. It is extremely important that they are included in the process to ensure that they understand the direction of the organization. Also, they are integral in getting this message out to the membership of the reserve.
- The involvement of the membership of the First Nation is a lot harder to gauge. The important thing is to communicate the plan to the membership. Each year, a list of each departments accomplishments should be documented and included in the next years annual report. Over time they should see gradual improvements in all areas of operations.

# Results

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- We ended up with a document that we are pleased with and proud of.
- Our plan is very aggressive
  - These objectives were created by the managers and their teams, but if objectives were too easy, they were pushed to do more.
  - We have seen other strategic plans that concentrate on 2 or 3 objectives

# Follow up

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- Mid year review
  - This is a good chance to measure each departments performance. It is also designed to put pressure on those managers that are lagging behind. The managers that perform prove to be great mentors for the other managers
- Doesn't sit on shelf
  - Our initial fear was that we would go through the process, and then it would sit on the shelf
  - Because of the action items and timelines, there are “marching orders” that are approved by Chief and Council
  - The performance by the managers will be factored into their performance evaluations at year end

# Follow up (2)

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- Planning for the new year is started and the work involved is going to be a fraction of the cost and time. The learning curve isn't as steep and we basically have the template in place to complete the finished product in a short period of time.

# Challenges

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- Time
- Buy in from parties involved
- Cost
- Different managers have different capacity, some weaker and some stronger. This may cause delays, but with a committed team that can work together, this obstacle can be overcome.
- Reluctance to change
- Data/Statistic availability
- Lack of performance incentives

# Ahtahkakoop First Nation Vision and Missions Statements

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## **Vision Statement**

Our vision is to be a leader in Governance, Administration and Economic Development using the guiding principle of Chief Ahtahkakoop;

**"Let Us not think of Ourselves,  
but of Our Children's Children."**

## **Mission Statement**

The Ahtahkakoop Cree Nation will continue to advocate in the protection and preservation of our Treaty and Inherent Rights.

We will strive towards improving the quality of life for our people and community by elevating the economic, education and social standards.