

# Core skills toolkit: Strategic planning

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# Introduction to the capability development resources

## Funding Guide

*designed to help your community group or not-for-profit organisation apply for funding.*



## Core skills toolkit

*A practical, easy-to-use toolkit of resources and insights to help new and small community groups or not-for-profit organisations thrive.*



## Capability support wheel

*A signposting tool designed to help community organisations find development resources through universal, tailored and targeted support.*



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# Introduction to the Core skills toolkit: Working in a culturally responsive way



**Audience:** new and small community groups.

**Topics included:**

- Community engagement
- Te Tiriti
- **Strategic planning**
- Evaluation and measuring impact
- Communicating your work
- Working in a culturally responsive way
- Wellbeing / Hauora

**Content:**

Each section covers why this is important, how to get started and a curated list of resources and templates

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## We will cover

## Why strategic planning matters - beyond the basics



Image: photo by airfocus on Unsplash

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# Please write in the chat

Any pātai/questions you may have about strategic planning

All questions are great questions!

# What is strategic planning?

 **Analogy:**

 **Strategy = Compass**

 **Plan = Map**

## Beyond the basics



## Strategy vs Plan - what's the difference?

Strategy	Plan
the why and where	the how and when
sets the direction	outlines the steps
big picture thinking	detailed execution
long-term and adaptive	short-term and specific

Example:

Strategy: *increase access to sport for low-income youth in Aotearoa*

Plan: *launch 3 new free after-school programmes by March*

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## Beyond the basics

### 🧠 From Idea → Strategy → Plan

Step	What It Looks Like	Key Question
💡 Idea	let's help more girls play sport	what do we care about?
🧭 Strategy	focus on removing barriers to access in rural schools over 3 years	where are we going, and why?
📝 Plan	partner with 5 schools and hire 2 coaches by February	how exactly will we do it?

### Quick Rule of Thumb

- ❓ Idea = A spark
- 🧭 Strategy = A direction
- ✅ Plan = A to-do list with dates and people

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## What does success look like?

How can you extract real value from your strategy?


Having these questions from the get go - really helps maintain a simple approach and keeps you on track


- does it help you? keep it simple
- is it easy to follow? write in layman's terms
- Is it culturally responsive? Ensure any cultural references are understood and achievable
- is it short? sets the direction, you can always flesh it out later
- can you turn it into actions? these form habits/practices or outcomes


## Common Pitfalls (and how to avoid them)


 strategy sits on a shelf


 keep it visible and reviewed quarterly


 no follow-up or measuring progress

 use a 1-page dashboard with key goals

 goals feel too ambitious or unclear

 refine goals based on your real capacity

 only a few understand the direction

 ensure everyone that matters knows

**Keep strategy alive using tools  
and habits**

# Your impact is directly aligned to the quality of your strategy



## Tools:

- Use a living document (e.g. Google Doc)
- Create a strategy dashboard: 3–5 key goals

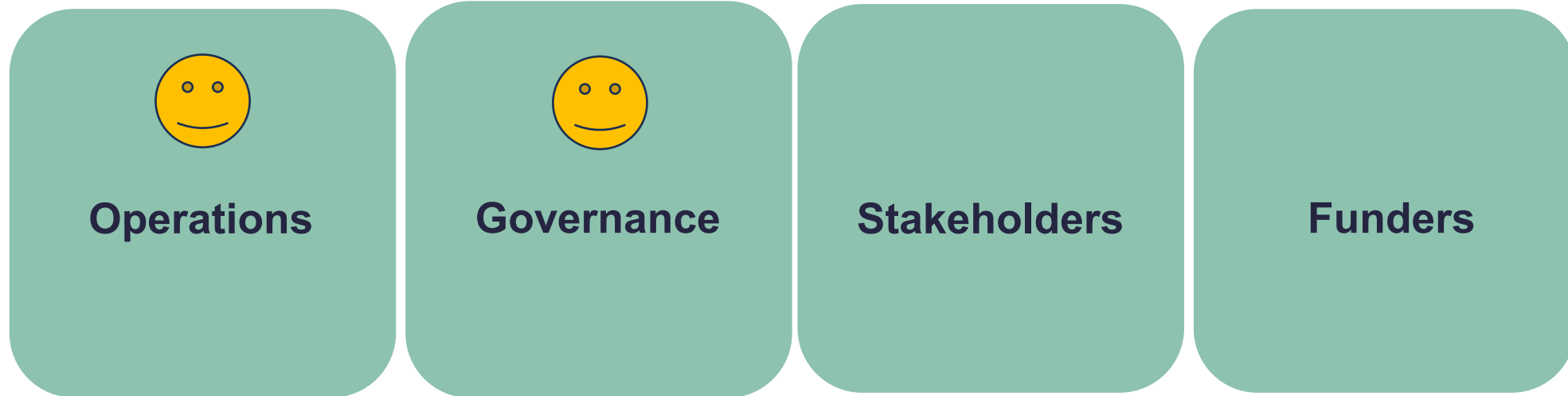


## Habits:

- Add “strategy check-ins” to monthly meetings
- Hold an annual/biannual review hui with community

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## Has your strategy aligned with all levers of your organisation?



- Can you lever your strategy in your operations and via your board for example?
- You could design your dashboard as a checklist in each lever?

**You've completed your strategy  
- so what now?**

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## Four next-step questions for 6 monthly reviews:

1. What's changed in our environment or community?
2. Are we solving the right problems?
3. Do our goals still make sense?
4. What partners or skills do we need next?

## Check in: Who's around the table, is it Mana to Mana?



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## Example of strategy in action

### Reiterate, review, result



Original goal:

run two youth/rangatahi events per term



Updated strategy:

create **youth-led** experiences that build leadership skills

Result:

shifted to co-designed events for rangatahi by rangatahi

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## Remember strategy = compass, not a map

Don't wait for the “perfect” plan

- use your values as a guide
- stay open to learning and evolving
- share strategy early on - it builds trust and alignment

# Communicate your strategy - it's as important as the strategy!



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**Strategy is not what you say  
you'll do –  
its what you choose to do  
everyday**

Let your mahi reflect your values.

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## Further reading and resources:

- [\*Creating a powerful one-sentence statement for what you do.\*](#) Offers guidance on crafting a compelling one-sentence statement that describes your organisation's mission and impact. It helps answer questions like "How can we clearly and powerfully communicate what we do?" and "What key elements should our statement include?".
- [\*Strategic planning, what, why and how.\*](#) Explains the fundamentals of strategic planning and presents a range of strategic planning tools.
- [\*Template for a strategic plan.\*](#) This template provides a practical tool for creating a strategic plan. It helps answer questions like "How can we structure our strategic plan?" and "What key components should be included?".
- [\*Developing strategy for your organisation.\*](#) This workbook will introduce some key concepts to help you understand the role of strategy in your organisational planning, and how to develop your strategy.

# Q&A

No such thing as a silly question.

Please put any **pātai/question** you may have about strategic planning in the chat

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**Thank you**