

# Strategic Planning in Uncertain Times:

## Lessons from Harvard's Congruence and Adaptive Leadership Models

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YMCA

We build strong kids,  
strong families, strong communities.

## Session Objectives



YMCA

To use the Harvard Congruence Model to:

- Identify performance and opportunity gaps, develop a comprehensive fundraising strategy and ensure alignment with execution plans
- Ensure the necessary flexibility to adapt to emerging factors while implementing the fundraising strategy
- Create a balanced approach to planning and execution that is based on an understanding of the benefits and constraints of strategic planning

## Experience



### 1980's

- YMCA of Montreal
- Michael Porter

### 1990's

- YMCA of Hamilton/Burlington
- Capital Development Strategy

### Early 2000's

- McGill University
- Henry Mintzberg/Complexity Science

### Late 2000's

- Congruence Model

### 2010?

- Adaptive Leadership

## Harvard Congruence Model



### Mission, Vision, Leadership

### Gap Analysis

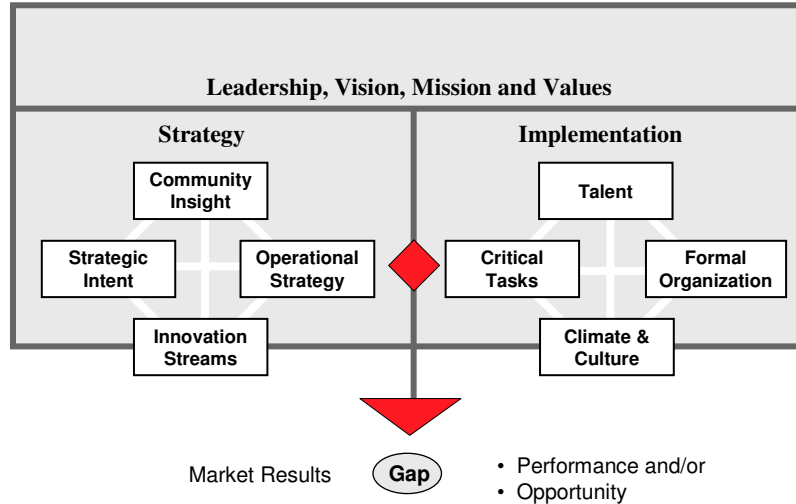
- Performance Gap
- Opportunity Gap
- Seven Why's

### Strategy

### Execution

### Congruence/Alignment

# Congruence Model: Leadership, Strategy and Implementation



## Performance/Opportunity Gaps



### Performance Gaps:

- Financial development
- Operational performance of YMCA Cedar Glen
- New facility development

### Opportunity Gaps

- Asset development
- Growing, changing and diverse needs of the GTA
- Government policy changes
- The "Connections" agenda
  - Youth
  - People
  - Communities

# Community Insight



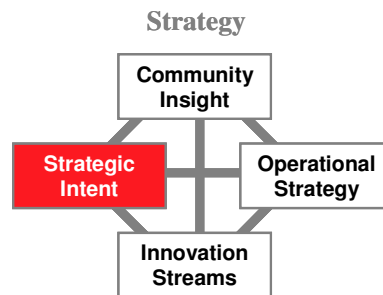
- Government policies
- Demographic shifts in the GTA
- Increased regulatory environment
- Increased scrutiny of charities and public organizations
- Immigration
- Racialization of poverty
- Growing gaps between rich and poor
- Perception of safety
- Rapid shifts in technology



# Strategic Intent



- Our role as “connectors”
- Neighbourhood hub
- Collaboration
- Asset based
- Location driven



# Operational Strategy



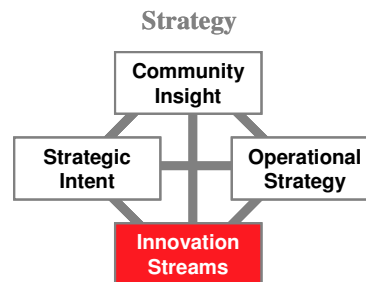
- Build capacity to leverage and manage assets
- Technology platforms
- Strong relationships
- Philanthropy
- Collaborative research
- Leverage our YMCA networks
- Address operational gaps



# Innovation Streams



- Technology
- Partnerships
- Development
- Non traditional models of financing and facility development
- Positioning the YMCA brand



# Key Critical Tasks



## Asset Management and Renewal

- Steve Boone

## Diversity and Social Inclusion

- Medhat Mahdy

## Financial Development Strategy

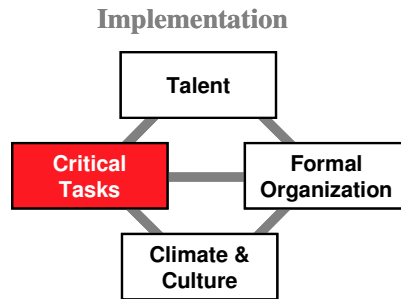
- Scott Haldane

## Government Policy

- Laura Palmer Korn

## New Technology

- Medhat Mahdy



# Emerging Priorities

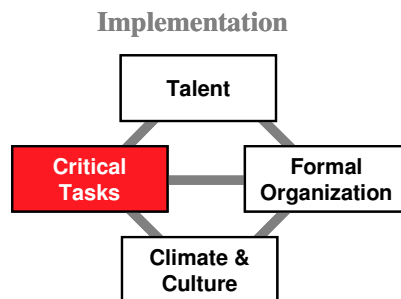


## International Partnerships Strategy

- Laura Palmer Korn

## Environmental Leadership

- Wendy Richardson



## Priorities to be monitored



### Human Resource Strategy

- Medhat Mahdy

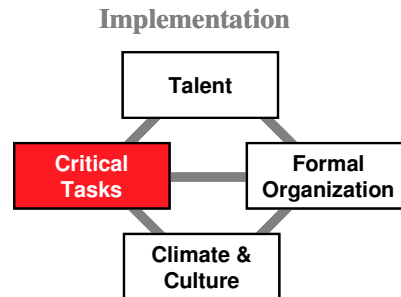
### Teen and Young Adult strategy

- Laura Palmer Korn

### YMCA Camp Pine Crest

#### Re-launch

- Linda Cottes



## Operations Priorities

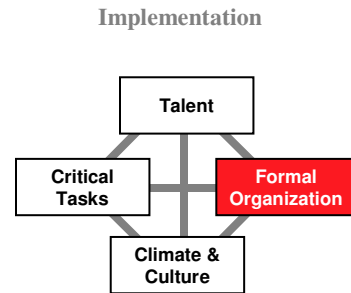


- Change management - Operators Group
- Child care expansion - CYFD
- Family Access Strategy - HFR
- Human Resources Strategy – volunteers - Operators Group
- Markham YMCA - HFR
- Member involvement - Operators Group
- Philanthropy culture and education - Operators Group
- Public policy and external relations - Operators Group
- West End YMCA re-launch - HFR
- YMCA movement leadership - CEO
- YMCA Youth Foyer – E & C

# Formal Organization



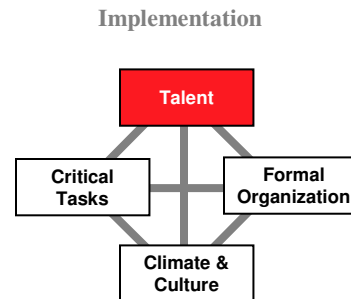
- Senior staff structure
- Operators Group
- Strategic Advancement Team
- Strategic Government Relations Team
- Board Task Forces
  - Government Relations Strategy
  - International
  - Strategic planning



# Talent



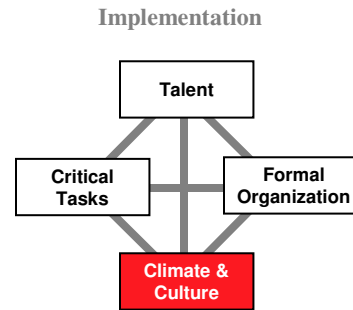
- New competency model
- Succession planning
- Volunteer development
- New skills to be added to enhance capacity



# Climate and Culture



- Diversity and social inclusion
- Stay focused on culture improvements
- Internal communications that focuses on meaning
- Fact-based decision making
- Understanding and including the different generations



# Adaptive Leadership



“Followers want comfort, stability and solutions from their leaders. But that’s babysitting. Real leaders ask hard questions and knock people out of their comfort zones. Then they manage the resulting distress.”

- Heifetz and Laurie

## Adaptive Change



Occurs when people and organizations are forced to adjust to a radically altered environment.

Changes in societies, markets, customers, competition and technology are forcing organizations to clarify values, develop new strategies and learn new ways of operating.

- Challenges to deeply held beliefs
- Values less relevant
- Legitimate but competing perspectives

## Adaptive Problems



- Systemic with no ready answers
- Finding solutions must shift from leaders to followers
- Adaptive change is distressing
  - New roles
  - Relationships
  - Values
  - Behaviours
  - approaches
- Leaders must shift from answers to questions

## Adaptive Leadership



Leader's Responsibilities	Technical or routine situation	Adaptive Problem
Direction	Define problems/ provide solutions	Identify the adaptive challenge and frame key questions and issues
Protection	Shield the organization from external threats	Let the organization feel external pressures within a range it can stand
Orientation	Clarify roles and responsibilities	Challenge current roles and resist pressure to define new roles quickly
Managing conflict	Restore order	Expose conflict or let it emerge
Shaping norms	Maintain norms	Challenge unproductive norms

## Principles for Adaptive Change



- Get on the Balcony
- Identify the Adaptive Challenge
- Regulate Distress
- Maintain Disciplined Attention
- Give the Work Back to People
- Protect Voices of Leadership From Below

## Get on the Balcony



- Pattern recognition
- Providing context
- Prerequisite for other principles

## Identify the Adaptive Challenge



- Technical challenge (expert advice and technical adjustments within basic routines) vs. adaptive challenge (need to learn different ways of doing business, develop new competencies and begin to work collectively)?
- Diagnosis:
  - Listen to ideas and concerns inside and outside
  - Conflicts as clues
  - Hold a mirror up to leadership

## Regulate Distress



- Balance feeling the need for change with feeling overwhelmed
- Three fundamental tasks:
  - Create a holding environment - sequence and pace the work
  - Change the role of leadership to be effective in an adaptive change situation
  - Presence and poise

## Maintain Disciplined Attention



Diversity of perspectives:

- Confront tough trade-offs in values, procedures, operating styles and power
- Get conflict out in the open and use it to fuel creativity
- Identify and remove distractions
- Maintain focus on tough questions

## Give the Work Back to People



- Bring peripheral views to bear on tactical and strategic decisions:
  - Management needs to support rather than control; employees need to learn to take responsibility (they must discover the problem and own the solution)
  - Develop collective self-confidence (success, experience and organizational environment)

## Protect Voices from Below



- Foundation of an organization that is willing to experiment and learn
- Often disruptive and not articulate; frequently suppressed in the name of teamwork and alignment
- Resist the urge to glare at or silence the disequilibrium

## Leadership as Learning



- Classic error of treating adaptive challenges like technical problems
- Problem may not be execution alone but could also be an attempt to address adaptive change through a technical strategy
- Adaptive leadership is not about selling a vision... “one can lead with no more than a question in hand.”

**THANK YOU**

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YMCA of Greater Toronto*



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