



Setting Vision and Strategy: Charting a Course for Meaningful Impact

Identify and understand the opportunities, challenges, and risks that influence your internal and external environments to strategically influence decision-making and enhance agency.

Competencies

"This Deep Dive draws from one of the Areas of Competence in the [Career Development Manager/Leader Competency Framework](#). Through reflection, analysis of real situations, and practical activities, you'll explore how this part of the framework shapes your leadership practice."

The Challenge Ahead

In the ever-evolving landscape of human services, the ability to set a clear, strategic vision plays a big role, not only in guiding teams, but in shaping outcomes that reflect the values and needs of the communities we serve. Vision and strategy go beyond planning tools, they represent acts of leadership that anchor purpose, align effort, and mobilize action.

The Leader's Role in Setting Vision and Strategy

Effective leadership starts with a deep understanding of both internal operations and the external forces shaping the organization. Political shifts, policy changes, demographic trends, technological advances, and evolving societal expectations all play a role. By embracing this complexity, teams can anticipate risks, identify opportunities, and set priorities with clarity and purpose.

Crafting a strong vision calls for imagination and pragmatism, one that inspires people within the organization while remaining achievable and grounded in reality. Through inclusive dialogue and collaboration, leaders co-create a direction that resonates across stakeholders and encourages shared ownership.

Once the vision is in place, clear and consistent communication brings it to life. Translating it into tangible actions provides clarity for teams and sparks alignment around common objectives. Staying attuned to evolving contexts, advocating for services, informing policy, and adjusting strategies keeps the organization responsive and relevant.

Strategy is dynamic and adaptive, shaped by the people who lead it and the environments they navigate. By leveraging influence networks, fostering partnerships, and using resources strategically, human service leaders transform vision into movement and movement into meaningful impact.

In this resource, you'll find three useful exercises you can use to set vision and strategy for your team.

1. Strategic Context Audit
2. Vision Crafting Canvas
3. Influence and Advocacy Map



You can explore these exercises on your own or with your team. Completing them brings greater clarity and helps you support your team and external partners in envisioning the future you want to create and in taking action that aligns with that vision.





Exercise 1: Strategic Context Audit



What Is It

The Strategic Context Audit is a structured tool that helps leaders critically analyze the internal and external environments influencing their organizations. By surfacing opportunities, risks, trends, and organizational realities, leaders can develop sharper strategic insight and set a more resilient direction for teams and programs.

This activity promotes situational awareness, aligning leadership decisions with the realities on the ground and the evolving landscape beyond your organization's walls.



Why It Matters

By using it, leaders will:

- Understand current operating conditions and external forces shaping their work
- Identify areas of strength and vulnerability within their organization
- Reveal emerging trends and their strategic implications
- Support development of vision, priorities, and long-term planning



How to Use It

Step 1: Gather Relevant Information

- Review recent reports, performance data, policy briefs, and interest holder feedback
- Include perspectives from different levels of the organization if possible

Step 2: Complete the Internal Analysis

Step 3: Complete the External Scan (PESTLE Framework)

Step 4: Identify Emerging Trends

Step 5: Analyze Strategic Implications

Step 6: Translate Audit Insights into Strategy

- Use findings to inform strategic planning, leadership briefings, and vision-setting efforts
- Revisit the audit regularly to refresh your understanding of a shifting landscape





Pro Tips

- Use visuals like mind maps or dashboards to organize your findings
- Pair this tool with team discussions or interest holder interviews for added depth
- Keep your notes practical and actionable—focus on what leaders can respond to



Worksheet 1: Strategic Context Audit

Purpose

The Strategic Context Audit is a structured tool that helps leaders critically analyze the internal and external environments influencing their organizations. By surfacing opportunities, risks, trends, and organizational realities, leaders can develop sharper strategic insight and set a more resilient direction for teams and programs.

Internal Environment

- List your organization's key strengths (e.g., expertise, reputation, staff engagement)
- Note any weaknesses that may inhibit progress or resilience (e.g., tech gaps, burnout)

Strengths	Weaknesses

External Environment – PESTLE Analysis

Explore these six categories that impact your agency, considering how each helps or hinders your work:

- **Political:** Laws, regulations, funding priorities
- **Economic:** Funding models, inflation, unemployment
- **Social:** Demographic shifts, community needs, cultural changes
- **Technological:** Innovations, automation, access to tools
- **Legal:** Compliance, privacy law, contract structures
- **Environmental:** Climate impacts, sustainability concerns





Political Factors	Economic Factors	Social Factors
Technological Factors	Legal Factors	Environmental Factors

Summarize

The external environment can be categorized similarly to your internal environment, in elements that help or hinder your work. Review the elements of your PESTLE analysis and summarize below.

Help	Hinder





Emerging Trends to Watch

- Capture 3–5 key trends (e.g., rise in mental health needs, integration of AI in service delivery)
- Consider: What changes are gaining momentum that you can't afford to ignore?

1.
2.
3.
4.
5.

Analyze Strategic Implications

What new opportunities could improve client outcomes or build capacity?
What risks could compromise service quality or stability?





Those of you familiar with SWOT analysis will recognize how the information you’ve gathered will feed into a 4x4 matrix that identifies both internal capabilities and external drivers and identifies which advantage or hinder your effort. Your strategy defines how you optimize the helping factors, and how you mitigate the hindering factors. You can summarize both internal and external factors below:

	Internal	External
Help	Strengths:	Opportunities:
Hinder	Weaknesses:	Threats:

Key Insights:

What insights do you and your team see from this process?





Worksheet 1: Strategic Context Audit (Sample)

Purpose

Analyze internal and external environments to identify priorities and risks.

Internal Environment

- List your organization's key strengths (e.g., expertise, reputation, staff engagement)
- Note any weaknesses that may inhibit progress or resilience (e.g., tech gaps, burnout)

Strengths	Weaknesses
• Dedicated frontline staff • Strong client trust	• Outdated case management system • Limited evaluation capacity

External Environment – PESTLE Analysis

Explore these six categories that impact your agency, considering how each helps or hinders your work:

- **Political:** Laws, regulations, funding priorities
- **Economic:** Funding models, inflation, unemployment
- **Social:** Demographic shifts, community needs, cultural changes
- **Technological:** Innovations, automation, access to tools
- **Legal:** Compliance, privacy law, contract structures
- **Environmental:** Climate impacts, sustainability concerns

Political Factors	Economic Factors	Social Factors
New provincial regulations	Rising cost of living impacts clients	Increased demand for mental health services
Technological Factors	Legal Factors	Environmental Factors
AI tools for service triage	Changes in privacy legislation	Climate-related displacement trends





Summarize

- The external environment can be categorized similarly to your internal environment, in elements that help or hinder your work. Review the elements of your PESTLE analysis and summarize below.

Help	Hinder

Emerging Trends to Watch

- Capture 3–5 key trends (e.g., rise in mental health needs, integration of AI in service delivery)
- Consider: What changes are gaining momentum that you can’t afford to ignore?

1. Shift toward integrated care models
2. AI-supported intake and triage
3. Declining volunteer engagement

Analyze Strategic Implications

What new opportunities could improve client outcomes or build capacity?
• Build tech capacity for service delivery • Grow cross-sector partnerships
What risks could compromise service quality or stability?
• Losing relevance with funders • Staff burnout amid service pressure





Summarized SWOT

	Internal	External
Help	Strengths: Long term staff with low turnover provides strong base of knowledge and skill to develop and deliver new programming	Opportunities: - New provincial regulations enable better reporting accuracy and data to inform programming - Rising cost of living and inflation may generate demand for new programming such as financial literacy
Hinder	Weaknesses: Increased technological literacy is required for new reporting system and emerging AI capability	Threats: - New provincial regulations will require time and training - Funding cuts to provincial mental health supports will reduce referral opportunities

Key Insights:

What insights do you and your team see from this process?





Exercise 2: Vision Crafting Canvas



What Is It

The Vision Crafting Canvas is a structured reflection and planning tool that supports leaders in developing an inspiring, actionable vision for their organization. Whether planning for one year or ten, this canvas helps distill insight into direction—balancing aspirational thinking with strategic realism.

A well-crafted vision is more than words on a wall. It is a rallying point, a compass, and a promise: to clients, communities, teams, and yourself. This canvas allows leaders to explore their purpose, anticipate the future, and shape a path that others can confidently follow.



Why It Matters

By using it, leaders will:

- Define clear short-, medium-, and long-term goals
- Connect vision with organizational values and external trends
- Translate abstract ideas into tangible, inspiring statements
- Prepare to communicate direction across interest holders and teams



How to Use It

Step 1: Set the Scene with Reflection

Explore your mindset and organizational context:

- What would success look like in 1, 3, and 10 years?
- What values should guide this direction?
- What changes in the environment (policy, community needs, technology) are influencing our work?

Step 2: Draft Your Vision Timeline

Break your thinking into three segments:

- Short-Term (1 Year) – Quick wins and operational shifts
- Medium-Term (3 Years) – System changes, capacity growth
- Long-Term (8-10 Years) – Legacy-building, wide-scale transformation

This helps you think in layers – practical next steps, strategic progress, and legacy impact.

Step 3: Write a Vision Statement

- Keep it under 100 words





- Make it specific enough to guide actions, yet broad enough to stay flexible
- Try reading it out loud—does it feel powerful and authentic?

Step 4: Visualize It

Optional but helpful: sketch a mind map, metaphor, or symbolic image that represents your vision. This can spark creativity and support communication across diverse interest holders.

Step 5: Test and Share

Talk it through with colleagues, mentors, board members, or community partners. Ask:

- Does this resonate?
- Is it clear and motivating?
- What might be missing?



- Revisit your vision annually—keep it a living document
- Link vision to strategy by identifying key priorities that support it
- Use your vision as a filter for decision-making (“Does this move us closer?”)



Worksheet 2: Vision Crafting Canvas

Purpose

Define organizational direction across time horizons.

Reflective Prompts

- What does success look like in 1, 3, and 10 years?
- What values should guide this journey?
- Who must be included to make it real?

Timeline for Vision Development

Timeline	Desired Outcomes	Values	Who Makes it Real
Short-Term (1 Year)			
Medium-Term (3 Years)			
Long-Term (8-10 Years)			





Draft Your Vision Statement

Try the following outline:

"In a future shaped by _____, our organization will _____ by focusing on _____."

Or try your own words:

Optional: Sketch or Mind Map of Your Vision

What image or metaphor illustrates your vision?





Worksheet 2: Vision Crafting Canvas (Sample)

Purpose

Define organizational direction across time horizons.

Reflective Prompts

- **Success in 1 year:** Streamlined intake and increased client satisfaction
- **Success in 3 years:** Strong community impact through strategic partnerships
- **Success in 10 years:** Regional leader in trauma-informed service delivery
- **Guiding values:** Dignity, inclusion, collaboration

Timeline for Vision Development

Timeline	Desired Outcomes	Values	Who Makes it Real
Short-Term (1 Year)	Launch new client feedback system		
Medium-Term (3 Years)	Formalize partnership with two local agencies		
Long-Term (8-10 Years)	Expand services to three rural communities		

Draft Your Vision Statement

“In a future shaped by rising complexity in client needs and rapid technological change, our organization will lead with compassion and innovation by building inclusive partnerships and transformative programs.”





Optional: Sketch or Mind Map of Your Vision

What image or metaphor illustrates your vision?





Exercise 3: Influence and Advocacy Map



What Is It

The Influence and Advocacy Map is a strategic planning tool that empowers leaders to chart the key interest holders, power structures, and communication pathways that shape outcomes within and beyond their organization. In complex and often fragmented environments, influence is not always linear—understanding where it exists (formally and informally) is essential to advancing ideas, securing resources, and shaping policy.

This tool goes beyond “who you know” and explores how you engage, what you say, and when you act—turning relational insight into strategic motion.



Why It Matters

By using it, leaders will:

- Visualize the landscape of decision-makers, allies, and informal influencers
- Craft tailored advocacy messages that speak to shared priorities
- Plan proactive engagement actions to advance a vision or initiative
- Build coalitions to increase agency and navigate barriers



How to Use It

Step 1: Identify Key Interest Holders

Begin by listing individuals or groups with influence over your organization's work.

- Formal Interest Holders: Executives, board members, funders, policy-makers, agency directors
- Informal Networks: Trusted staff voices, community connectors, former leaders, peer influencers

Tip: Consider individuals who can say “yes,” those who can block progress, and those who can shape opinion.

Step 2: Map Influence & Relationships

Use a two-column chart, visual map, or grid to classify Formal Interest Holders and Informal Networks

Then ask:

- What is their level of influence?
- Do they support your vision?





- What are their interests or concerns?

Use symbols or colour-coding to show alignment, risk, or leverage potential.

Step 3: Craft Advocacy Messages

Tailor your message to resonate with each interest holder or group. A compelling message often includes:

- Core Idea: What you're asking for or proposing
- Shared Benefit: Why it matters to them or their constituents
- Values Connection: How it aligns with broader goals or mission

Step 4: Plan Engagement Actions

Develop a tactical approach to build support or initiate change:

Consider diverse channels: briefings, informal conversations, policy forums, newsletters, social media, coalition meetings.

Step 5: Track Progress and Adapt

Create a simple dashboard or spreadsheet to monitor:

- Who you've engaged
- Response level or sentiment
- Next steps required

Use this map regularly during strategic planning, vision rollouts, or advocacy campaigns. Revise as relationships shift or new interest holders emerge.



Pro Tips

- Influence doesn't always correlate with title—listen carefully to informal networks
- Build trust before making asks—relationship equity matters
- Prepare multiple versions of your message for different audiences
- Stay curious—ask questions and learn what matters to others



Worksheet 3:
Influence & Advocacy Map

Purpose

Identify key interest holders and leverage influence pathways.

Identify Key Interest Holders

Formal Interest Holders (Decision-Makers & Policy Influencers)	Informal Networks (Connectors & Advocates)

Map Influence and Relationships

Formal Interest Holders (Decision-Makers & Policy Influencers)	Level of influence Support for your vision Interests or concerns
Informal Networks (Connectors & Advocates)	Level of influence Support for your vision Interests or concerns





Strategic Messages & Engagement Plan

Formal Interest Holders (Decision-Makers & Policy Influencers)	Engagement Method	Message	Timelines
Informal Networks (Connectors & Advocates)	Engagement Method	Message	Timelines

Craft Engagement Messages

Tailor your message to resonate with each interest holder or group. A compelling message often includes:

- Core Idea: What you're asking for or proposing
- Shared Benefit: Why it matters to them or their constituents
- Values Connection: How it aligns with broader goals or mission





Strategic Message	Key Benefit	Target Audience	Action Steps	Timeline



Worksheet 3:
Influence & Advocacy Map (Sample)

Identify Key Interest Holders

Formal Interest Holders (Decision-Makers & Policy Influencers)	Informal Networks (Connectors & Advocates)
Executive Director	Frontline peer champions
Municipal social services board	Local community organizers
Funding body representative	Retired case managers as advisors

Map Influence and Relationships

Formal Interest Holders (Decision-Makers & Policy Influencers)	Level of influence Support for your vision Interests or concerns
Informal Networks (Connectors & Advocates)	Level of influence Support for your vision Interests or concerns





Strategic Messages & Engagement Plan

Formal Interest Holders (Decision-Makers & Policy Influencers)	Engagement Method	Message	Timelines
Director of Services	One-on-one meeting	Service integration	October
Field Champions	Coffee check-in	Leadership development	Biweekly
Informal Networks (Connectors & Advocates)	Engagement Method	Message	Timelines

Craft Engagement Messages

Strategic Message	Key Benefit	Target Audience	Action Steps	Timeline
"Integrated care reduces client recidivism"	Supports community stability	City Councillors	Host policy roundtable	Q3
"Technology must serve the human first"	Promotes ethical innovation	Internal staff	Deliver lunch-and-learn session	Q2
"Partnerships strengthen service resilience"	Enables shared resources	Local agencies	Initiate joint grant exploration	Q4

