



Battlefords Agency Tribal Chiefs



2020 - 2023 Strategic Plan

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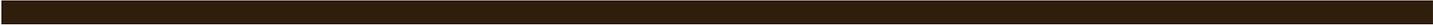


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INTRODUCTION

The scope of the plan

The Battlefords Agency Tribal Chiefs (“BATC”) was formed in 2007 to unite the Ahtahkakoop, Moosomin, Red Pheasant, Sweetgrass, and Stoney Knoll First Nations in addressing common issues and needed services that each member Nation faced. Saulteaux First Nation joined in 2009 and Mosquito Grizzly Bear’s Head Lean Man First Nation joined BATC in 2014. BATC provides services and support on- and off-reserve to the more than twelve thousand citizens of the member Nations. Advisory services in the areas of housing development support, economic development, band governance, financial management, justice, sports and recreation, social development, employment training, and industry relations are provided by BATC.

The Executive Council has mandated BATC to provide supports to meet the objective of reducing dependency within the Nations and their members. BATC has a strong senior management team who deliver quality services for the sustainability, self-sufficiency, and autonomy of its First Nations’ membership. A significant focus is provided for youth to assist with removing barriers to support for educational, health, entrepreneur, and community support services. In addition, BATC has formed with its member Nations an investment entity to develop wealth and job creating opportunities.

With limited and sometimes uncertain funding from the Federal government, and higher expectations of services from its member Nations, BATC wants to ensure it employs its limited resources in the most effective and efficient manner. Therefore, the Executive Director and senior management team have prepared the following strategic plan to ensure the limited resources received are used in a prioritized and efficient manner.

The value of the strategic plan

This strategic plan was developed to achieve the following:

- **To plan the future state of BATC** by building on current strengths and momentum, and addressing the challenges currently faced by the organization and its members Nations.
- **To communicate with members** and to ensure that BATC’s future direction aligns with member values and priorities.
- **To engage staff** and to ensure that the BATC’s future direction aligns with the expectations of staff and their operation plans.
- **To align the efforts of the Executive Council and senior management** toward common goals, priorities, strategies, and initiatives.
- **To direct planning and growth** within BATC.
- **To guide the day to day decision making** of BATC’s leadership and staff.
- **To empower the leadership** to more efficiently and purposefully oversee and guide the governance and operation of the organization.
- **To communicate to stakeholders** the benefits of the strategic goals, and how they can support BATC in achieving its mission and vision.

Key steps in the development of the plan

The development of the 2020-2023 Strategic Plan included:

- A review of the summary of the 2010-2011 Strategic Plan.
- A review of the 2018-2019 Business Plan and related Fundamentals Management MAP.
- A strategic planning session with senior management to review the 'current state' as it relates to operations, initiatives, concerns, and opportunities for each program. Strategic goals for 2020-2023 were established and strategies and performance measures related to implementation were identified.
- Final approval of the Strategic Plan including its implementation plan, key indicators, and proposed timelines by senior management.

BATTLEFORDS AGENCY TRIBAL CHIEFS – WHERE WE ARE TODAY

Mission

BATC is dedicated to sound governance that creates opportunities for its members.

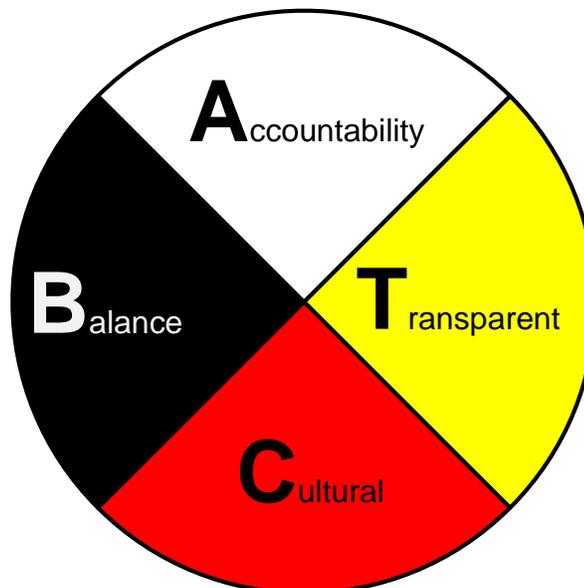
Vision Statements

A leading First Nation organization assisting, enhancing, and promoting success for its membership based on the spirit and intent of the Treaties.

Through strategic hiring, staff development, and partnerships, to be the expert resource for member Nations for all areas of their operations and supporting urban services in the Battlefords region.

“Integrated in our communities’ success”

Values



SWOT Analysis

Strengths and Weaknesses are internal to BATC and require the attention of the Executive Council and management. Good organizations capitalize upon their strengths and minimize their weaknesses. Executive Council and the management team must constantly evaluate how each decision will impact the strengths and weaknesses of BATC.

Opportunities and Threats are external to the organization and beyond the control of BATC. However, recognizing and capitalizing on opportunities or taking action to reduce exposure to threats are signs of a tuned-in, responsive leadership team.

Strengths

Through innovative service delivery and a strong, consistent focus on reducing dependency, BATC provides many benefits to its member Nations and can leverage those strengths over the next three years. The strategically important internal strengths of BATC are:

- **Strong, strategic leadership** – BATC has a dedicated team of senior management who are solution oriented and work well together. Many of the senior team have been with the organization for many years which provides stability and experience yet continue to be creative and innovative as they are open to changes. The senior management team work within the governance framework and support the policies and procedures which are important to a stable and effective organization. Business plans, strategic planning, and risk management are regular processes undertaken by the team to maintain the focus on the member's needs.
- **Reputation for 'delivering'** – For the current service offerings, BATC provides a high level of service quality. Users of the services, specifically in training and employment support constantly provide positive feedback and continue to use additional or complementary services. Relationships with funders are also positive as BATC is able to implement and properly report on the activities funded which has led to innovative funding models and access to new programing dollars.
- **Governance system** – BATC has prepared and implemented strong governance practices which are routinely followed, assessed, and adjusted as necessary. Executive Council, advisory boards, and senior management are aware of and understand their roles within the organization. There is strong participation by the member Nations in the activities of BATC, and they have begun to implement the best practices role modeled by BATC in their communities.
- **Adaptability** – As the organization is relatively new with significant growth, the team is adept and comfortable with change. As a result, BATC can adapt quickly and handle complex tasks with limited notice while working together effectively to meet project objectives. Executive Council has also been effective in performing its duties even with changes in Nation leadership from community elections. BATC is also willing to seek and use advice and assistance when necessary.

Weaknesses

BATC is a young organization just beginning to mature into the desired expert resource for its member Nations. The following strategically important internal challenges were identified:

- **Key processes not yet developed or implemented** – Certain key processes have not been developed or implemented to help manage risk which include sufficient HR documentation to support discipline and potential termination; succession planning for key managers; and, business continuity plans including disaster recovery plans, fire safety plans, OHS committee meetings, etc.
- **Communication issues** – Internally there are instances of limited communication between departments of operational and strategic initiatives. As a result, there may be missed opportunities or duplication of effort/services/. Staff members have indicated there are times where expectations were not clear which led to an expectation gap for performance. Externally, information provided to users of the services is not consistently provided and may not be provided in the appropriate medium, be fully understood by the users what is available or what they should be expecting, and what BATC is doing for them as a community. Social media and website presence is out-dated and requires an update and improvement.
- **Location** – Due to the decentralized nature of the service delivery and the large geographic area the services are provided within, employee morale, mentoring, and evaluation can be negatively affected. As well, service delivery by program or location may not be consistent. Certain facilities are not sufficient for the current or future need, as BATC has either outgrown the facility or selected the facility out of necessity due to lack of other choices. There is a lack of urban on-reserve office and programming space.
- **Recruiting and retaining** – For certain entry level positions, BATC has unsuccessful in recruiting and retaining the appropriate staffing level to support the senior management team. As well, uncertainty on certain project funding which is only committed to annually results in employee uncertainty from short-term contracts which decreases the ability for BATC to retain trained employees who are looking for more stability in employment options.
- **Information technology support** – Contracting external support for IT managed services is currently sufficient for BATC internal needs, however as the organization grows and to be able to provide that support to member Nations the current system is not optimal. Certain systems are also required to be reviewed, upgraded, or purchased which include a housing data management system, alternative financial management system, etc.

Opportunities

The following strategically important external opportunities were identified during the strategic planning process:

- **New funding sources** – The current Federal government has implemented a ‘new fiscal relationship’ which provides the opportunity for new funding and programs, as well as changes to funding models. In addition, the CHRT ruling has provided opportunities for prevention funding to support First Nation youth.
- **Expanded service offerings** – Additional service needs will be required by the member Nations including programs such as Elder support, justice initiatives, and increased urban services and cultural support. Changes in technology will also provide new opportunities for new services or methods of delivery of the services especially in training.
- **Regional changes** – Changing economics will provide opportunities within the region, with opportunities outside of the resource sector and expanded agri-business options. The current relationship with the City provides significant opportunity for improvement with strategic partnerships, urban reserve locations, new facilities, etc.
- **The changing political environment** – Changes in laws, government priorities, and public opinion are resulting in additional funding opportunities or projects.

Threats

BATC is faced with a changing environment and political landscape. The following strategically important external threats were identified:

- **Access to qualified employees** – Given the competition for high quality and qualified employees, there could be difficulty in recruitment; also there is a constant threat of loss of key employees to other opportunities, especially related organizations or by employees running for political office.
- **Political forces** – Various influences on funding, governance, and operations are related to federal, provincial, municipal, First Nation, and member political influence. The changing of terms or loss of funding would have a significant impact on the operations and ability to provide the desired level of programming. Elections, policy compliance, effective committee or Board appointments, etc. can influence effective operations by those in governance. The relationship with the local municipality is also currently not supportive of meeting BATC’s goals.
- **Strategic partnerships** – Access to appropriate partnerships for placement, co-delivery of programming, etc. is required – BATC reputation, ability to maintain terms of agreements, and leveraging networks important to access and keep those partnerships; other entities which could be partners may become competitors which could hinder BATC’s ability to provide key programming such as training.
- **Infrastructure threats** – Access to key assets is important to operations of BATC – therefore the loss of buildings, IT infrastructure, and IT data is imperative.

STRATEGIC GOALS

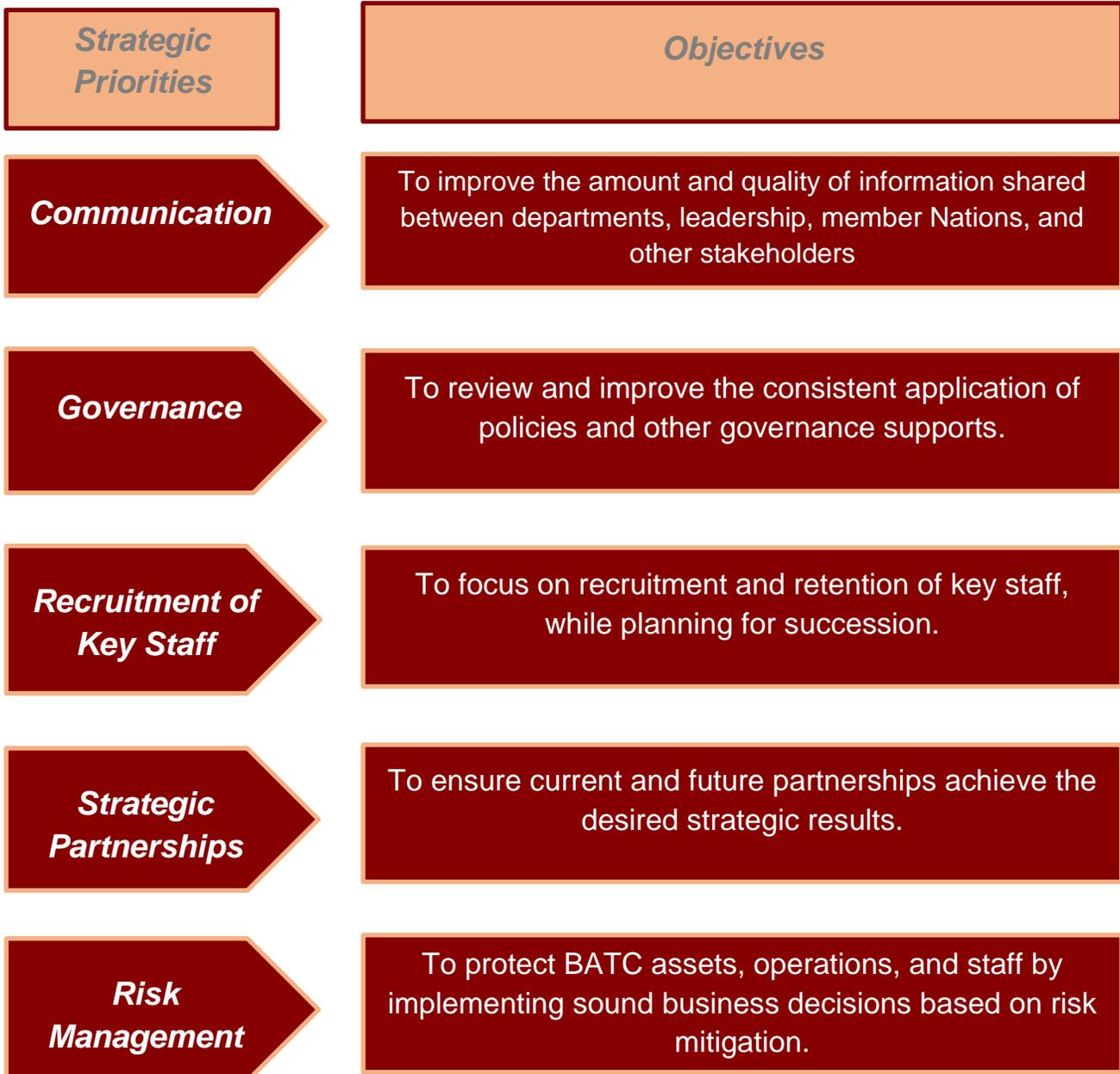
The BATC management determined the following significant areas of priority for BATC.

1. **Communication** – increase communication between departments; formalize external communication policies and processes (considering both member Nations and strategic partners); use of social media, website, newsletter, annual reports, etc.; etc.
2. **Information Technology** – Reduce reliance on external service providers for managed services; ensure protection of data and physical assets (restricted access to area where computer located, policy of screen lock-out enforced, control tags to monitor listing of assets owned).
3. **Housing Services** – Expand current services to reduce reliance on external service providers; support member Nations with housing and tenancy policy enforcement, training provided for basic maintenance and repairs, and housing development plans; housing data management system.
4. **Recruitment of Staff** – find trained, well-qualified people to fill key roles; succession planning for key roles including mentoring and training; administration support for all departments; review term projects to create more job security for employees in those areas.
5. **New Program Offerings** – Development and implementation of new program services to member Nations which may include justice/policing, IT managed services, financial management, urban Elder care and housing authority, policy development support, etc.; identification process for new or upcoming changes affecting Nations (general advisory service)
6. **Governance** – Reviewing current structures/policies/terms of reference to ensure effectiveness and consistency, supporting increased communication and continuity of leadership; revising organization chart to include expected areas of future growth;
7. **Strategic Partnerships** – evaluate current partnerships to assess alignment with strategic plan and effectiveness; identify missing key partnerships and create plan to initiate discussions and agreements; identify plan for dealing with City issues; facilitate aggregation of partners services to be more effective in deliver to member Nations; etc.
8. **Infrastructure** – Review on-reserve office locations for staff safety/morale and options; support member Nations development of urban reserve locations; planning for central office and training centre on urban reserve; capital asset plan to support expected growth; identify opportunity for increased cultural support facilities in urban locations.
9. **Risk Management** – implement the use of long-term plans for IT and capital assets; policy compliance; insurance reviews; disaster recovery and business interruption plans created; OH&S committee; HR expertise and policy/processes followed to support performance reviews and potential terminations; financial projections and funder diversification and/or long-term commitments; etc.

Although all nine (9) strategic areas are important and need to be included in department work plans and the budgeting process, management identified five (5) of the areas to prioritize for the next two plus years.

The five priority strategic goals are:

1. **Communication** – Improving internal and external communication.
2. **Governance** – Review current structures, policies, and terms of references to ensure effectiveness and consistency of the governance roles within BATC.
3. **Recruitment of key staff** – Fill immediate needs for key positions and administrative supports and create and implement succession planning strategies for all key roles.
4. **Strategic partnerships** – Continue to maintain and make strategic partnerships to assist with the various programming and advocacy provided by BATC.
5. **Risk management** – Implement a focus of ‘risk management’ to all areas of operations to support the long-term goals of BATC.



IMPLEMENTATION PLAN

The following specific initiatives have been identified to implement the 2020-2023 Strategic Goals

Strategic Goal #1: Communication

Implementation initiatives:

- **Communications and Publicity Specialist** – Recruit a public relations specialist to assist management and member Nations with internal and external communications. Specific activities related to the public relations role include:
 - Create a toolkit of templates, how-to's, and other resources to assist managers and member Nations develop effective press releases, newsletters, reports, etc.
 - Develop and implement an appropriate Internet social media policy and plan
 - Complete the updating of the website, and oversee the maintenance of the content for the website and other social media sites
 - Provide support for BATC event planning, attendance at external stakeholder events, and developing the BATC 'brand'
 - Provide support services to member Nations related to publicity initiatives at the community level and to help respond to news and other media release opportunities
- **Management meetings** – The objective is to improve the communication between departments and with Executive Council. Specific activities include:
 - Implement quarterly in-person director meetings – objectives are to discuss plans, new initiatives, and to help re-allocate resources as needed
 - Quarterly meetings to be supplemented with monthly telephone calls for brief updates
 - Executive Council reports providing departmental updates should be shared with the other directors
 - At least monthly staff meetings for relevant departments
 - Formal policies and procedures on meeting etiquette and expectations, with 'standing' agenda items and templated reporting formats for consistency and efficiency
- **Training** – Provide soft skills training as support to understanding communication techniques, how other people think and react to situations, providing effective feedback and mentoring, etc. Additional training on available systems such as computer access and various software and processes. Provide training to new hires on expectations and available resources. Ensure all of the employees are aware of the various supporting policies, such as the social media policy, conflict of interest, code of conduct, and internet usage.

Tracking Progress – Potential Indicators

- Number of monthly Directors meetings per year
- Number of quarterly Executive Council reports per year
- Number of new training sessions provided on communication
- Number of instances of multiple service areas providing coordinated assistance to members
- Increase in page visits to website and social media sites
- Frequency of website content updates

Strategic Goal #2: Governance

Implementation initiatives:

- **Review and update current policies, consider development of missing policies, ensure compliance with policies** – review financial management policy, vehicle usage policy, personnel policy, and CDC policy for necessary updates and a compliance testing plan. Consider if a specific governance policy is required to supplement the Convention Act.
- **Improve Board governance activities** – Create sound procedures and expectations for the delegated operating/advisory Boards. Specific terms of reference, Board member duties and responsibilities, and review of relevant policies will be provided to all Boards initially, with orientation provided for new members. Consideration of a Board 'portal' to be developed as part of the website to facilitate Board members having access to key resources on a timely basis, continuity of knowledge, consistency of information shared, and tracking of project status.
- **Support for Member Nation governance activities** – Member Nations may require various levels or types of support related to relevant governance activities which BATC should be prepared to assist with, including policy development, planning, attendance at Council and member meetings, orientation for new Council members.
 - Orientation: New and returning Council members should understand each of their Acts and Policies, what their responsibilities are (and are not), codes of conduct, conflicts of interest, the organizational chart of the First Nation and relevant business entities and the relationship between each group, Board appointments and what that means for their fiduciary duty and responsibilities, as well as their responsibilities related to BATC.
 - Strategic Planning: Additional support may be provided by returning to 'group' strategic planning – whereby member Nations each complete their strategic planning at the same time and location, allowing BATC staff to participate, coordinate, and support the community plans.
 - Training: BATC should consider providing knowledge sessions related to best practices for Council and/or management groups (i.e. all Band Managers meeting, or CFO meeting, etc.).

Tracking Progress – Potential Indicators

- # of policy sections reviewed annually
- # of policy compliance tests annually
- Board orientation/training provided
- Council orientation provided
- # of strategic plans developed for member Nations
- # of training sessions provided to member Nation Councils
- Frequency of member Nation management support meetings

Strategic Goal #3: Recruitment of Key Staff

Implementation initiatives:

- **Separation of the Governance and HR positions** – The roles of both positions have expanded such that one person can not effectively perform both roles, therefore an HR manager should be recruited.
- **Succession planning for Key Roles** – Development of a succession plan for each key role within the organization: firstly, determine if the position could be filled internal or must be filled externally; for any potential internal sourcing options, develop a plan to mentor, train, and provide learning opportunities for the potential candidates. Consider cross-training opportunities to mitigate risk of key team members not being available.

Tracking Progress – Potential Indicators

- HR manager position filled
- # of mentoring hours
- # of key roles with a succession plan
- % of cross-training plans completed

Strategic Goal #4: Strategic Partnerships

Implementation initiatives:

- **Improve relationship with City of North Battleford** – The current relationship with the City requires improvement to allow BATC and its member Nations to achieve their goals, specifically for service provision and quality-of-life for their urban members. A strategy needs to be developed on how to approach the City for a 'refresh' of the relationship and to work towards common objectives for the benefit of all City residents.
- **Improve relationships with Federal and Provincial departments** – Although there exists a 'sufficient' relationship with the federal and provincial funders, there is likely funding available which is not being considered for BATC. Increased effort to communicate with and gain support from the provincial and federal funders should be considered.
- **Evaluation of current state** – An evaluation of the current group of partners and the status of the relationship should be completed. Additional partnership opportunities, either corporate, service provision, or other Tribal Council or Indigenous organizations should be explored.

Tracking Progress – Potential Indicators

- # of meetings with City manager and/or Council
- # of initiatives co-sponsored with the City
- Development of a City relationship strategy
- Increase number of key partnerships
- Increase number of funded programs

Strategic Goal #5: Risk Management

Implementation initiatives:

- **Going Concern** – Currently, BATC is economically dependent on ISC funding for the majority of its programs and funds. A strategy should be developed to determine diversification opportunities as it relates to other funders, fee for service programs, and other own-source revenue opportunities. Business cases for the following should be considered as part of the strategy development:
 - Expansion of the training and employment program
 - Fee for service for member Nations including housing support, IT, consulting, financial management assistance, etc.
 - Procurement management to access buying power
- **Operation governance activities** – Expand the current operating activities to include 'best practices' in asset, knowledge, and people protection, including areas such as:
 - OH&S policy developed and implemented, including a fire and safety plan
 - Work interruption plan including a disaster recovery plan
 - Capital asset tracking including vehicles and computers
 - 5 year capital plans
 - IT policy compliance related to security

Tracking Progress – Potential Indicators

- % of revenue from ISC
- % of revenue from service delivery
- 5 year plan updated annually
- Password policy compliance %

Activities and initiatives	Lead	Desired Outcomes	Timeframe	How we will/could measure success
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Strategic Goal #1: Communication

Hire public relations specialist	NS	Qualified individual hired to manage the publicity and other marketing functions	June 20, 2019	Position filled
Public relations specialist initiates key activities	New PR specialist	Website completed and updated, social media strategy, tool-kit developed, etc.	March 31, 2020	Website completed; # of resources in toolkit
Quarterly director meetings	AT	Discussions on plans by department, re-allocation of resources where necessary, support for and knowledge of new initiatives	June 30, 2019	# of quarterly director meetings
Monthly conference calls	AT	Brief mid-quarter updates to share priority information	March 31, 2019	# of monthly calls
Minimum monthly staff meetings for relevant departments	Relevant managers	Knowledgeable and engaged teams and staff	Immediately and ongoing	Employee engagement and performance scores
Develop 'standing' agenda items and templated reporting formats	AT	Ensure meetings are managed properly to be effective and efficient	June 30, 2019	Director engagement; meeting evaluations
Information sharing strategy	AT	Determine most appropriate method of sharing key information from BATC meetings with members	Mar 31, 2020	'Customer' satisfaction
Improve information posted at satellite offices	AT	Ensure information is shared within entire organization	March 31, 2020	Employee engagement and 'customer' satisfaction
Soft skills training provided to management	New HR manager	Improved proficiency at time management, effective communication, and meeting management	Dec 31, 2019	Number of training hours attended
Orientation checklist created and supported by performance forms	New HR manager	Better prepared new employees	Dec 31, 2019	Completed checklist and forms

Strategic Goal #2: Governance

Review for updates on BATC policies (finance, personnel, vehicle, CDC)	AT	Relevant and useful policies updated	Sept 30, 2019	Policies updated
Determine if additional policy required for governance, or other areas	AT	Identify missing policies	Sept 30, 2019	Full complement of policies
Policy compliance testing	AT	Initiate process to test compliance of policies and report on findings regularly	Sept 30, 2019	% of policies compliant

Strategic Goal #2: Governance (continued)				
Offer strategic planning support for member First Nations	AT	Assist member Nations prioritize and implement best practices in governance	June 30, 2019	Number of Nations doing strategic planning
Survey the Chiefs of the member Nations on their expectations of BATC as a service provider	AT	Identify 'customer expectations' and ensure managed with work plans	Oct 31, 2019	Survey complete
Provide governance training and policy development support to member Nations	AT	Assist member Nations implement best practices in governance	Mar 31, 2020	Number of participants in training
Review C&C orientation to expand scope from just BATC information	AT	To continue to provide overview of the BATC services, but also include relevant information on roles and responsibilities of being a Council for their First Nation	Mar 31, 2020	Orientation review completed
Consider facilitating strategic planning for Nations at the same time	AT	Support member Nations in strategic priorities development, sharing best practices, providing input from BATC, etc.	Mar 31, 2021	Number of sessions completed

Strategic Goal #3: Recruitment of Key Staff				
Hire new HR manager	NS	Qualified individual hired to manage the HR functions and provide support to member Nations	Sept 30, 2019	Position filled
Mentoring and succession strategy completed	New HR manager	Creation of actionable items related to retention and succession of key roles	Dec 31, 2020	Number of positions with succession plan
Compliance review and support for monitoring consequences related to HR policy	New HR manager	Ensure better documented employee files and compliance with policies and labour legislation	Sept 30, 2020	% of policies compliant

Strategic Goal #4: Strategic Partnerships				
Strategy developed to work with City of North Battleford	KK	Improved relationship and more cosponsored initiatives with the City	May 31, 2019	Number of meetings with City Manager or Council
Federal and Provincial advocacy for support	NS	Increase the communication with key members of the federal ministries and provincial ministries to attract new funding and program opportunities	April 30, 2019	% increase in program funding
Explore opportunities to work with other Tribal Councils	BATC Chair	Increase access to resources and ability to provide more services to member Nations	June 30, 2019	Number of new partnerships
Develop prevention policy and strategy for key partnership	VW	Expand service potential by sourcing new funds or partners	June 30, 2019	Number of new NPO partnerships

Strategic Goal #5: Risk Management				
Set-up and implement OH&S committee	New HR Manager / JB	Provide support for a safe working environment	June 30, 2019	OH&S committee working as required
Preparation of a business interruption plan	VW	To ensure the organization is prepared for the unexpected and can continue to operate	Mar 31, 2020	Plan completed
Capital asset tracking and 5 year plan	KK	Proper management capital assets	Mar 31, 2020	Plan completed
Vehicle policy	AT	Proper management of vehicles	Mar 31, 2019	Policy completed
Explore business case for other sources of revenue	NS / KK / FF	Diversify revenue sources such that less reliant on funding from ISC. KK to commit to 1-3 hours per month researching funding opportunities. FF to explore sports and recreation opportunities.	Aug 31, 2020	% of non-ISC funding increased

Other Items				
Evaluate electronic time/payroll system options	KK	Ensure a quality and efficient system is used to support the payroll function	Dec 31, 2019	Evaluation complete

REVIEW/NEXT STEPS

To ensure the Strategic Plan performs as designed, BATC will hold regularly scheduled formal reviews of the Strategic Plan and its implementation.

- **Semi-annual implementation status update sessions** will be held with Program Directors and other key staff and stakeholders; and,
- **An annual report** will be prepared for Executive Council based on these sessions, to outline what has been successful and what needs to be changed to ensure the successful implementation and evaluation of the Strategic Plan.

The purpose of these sessions will be to gather information that:

- Informs Executive Council about the implementation progress of the Strategic Plan;
- Determines if the work done supports the achievement of the strategic goals, mission, and vision of BATC;
- Outlines how to address emerging challenges and build upon past successes;
- Provides ongoing guidance and feedback to employees, stakeholders, and leaders;
- Guides future activities/initiatives; and
- Contributes to accountability.

The value of this strategic plan will also be maximized by engaging in the following activities:

- **An annual review and updating of the plan and the resources that support the plan** - new priorities will emerge; lessons will be learned; progress will be made. As the world around BATC changes, the leadership and management will need to adapt and evolve.
- **Communication of the plan to all stakeholders** - so that all can align to achieving the strategic goals, and so that momentum and enthusiasm can be generated to support the plan.
- **Tracking and reporting on progress, celebrating success** – Senior management should review performance measures quarterly to see if initiatives are on track to achieving the strategic goals.
- **Support and guidance from BATC leaders**- in referring back to the plan, staying the course, keeping up the momentum, and setting high standards for accountability, transparency, and achieving results.
- **Effective management of resources**- using all resources available in an efficient and coordinated way, focused on the desired results, will require management skills in the areas of team-building, planning and budgeting, reporting, empowering others, and holding others accountable.



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