

Strategic Planning & Facilitation Services for Professional Associations

Helping Ontario professional associations build practical, evidence-informed strategic plans that strengthen member value, advocacy, governance, and organizational performance.

Why Strategic Planning Matters

Professional associations operate in an increasingly complex environment shaped by changing member expectations, workforce pressures, government policy, technological innovation, evolving professional practice, and the need to demonstrate value.

An effective strategic planning process provides Boards and executive leaders with an opportunity to step back from day-to-day operations, assess emerging risks and opportunities, understand member and stakeholder needs, consider organizational capacity, and establish clear priorities for the years ahead.

The result is a practical roadmap that aligns member value, advocacy, governance, programs and services, and organizational sustainability.

How Upstream Management Solutions Can Help

Planning & Facilitation

- Strategic planning process design & governance
- Executive & Board facilitation & support
- Strategic retreats
- Environmental scanning
- Member & stakeholder engagement

Plan Development

- Strategic priorities
- Outcomes & success measures
- Performance indicators
- Implementation roadmap
- Board presentations

Why Upstream?

- 20+ years in Ontario's professional regulatory ecosystem
- Deep understanding of regulators, associations, and government relationships
- Evidence-informed and collaborative approach
- Practical facilitation and implementation support
- Association governance, member engagement, and organizational performance expertise

Strategic Planning Process

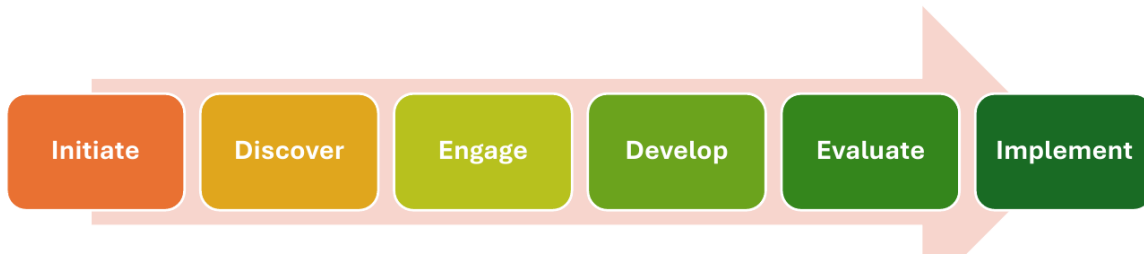


Figure 1: Strategic Planning Process: Flexible and proportionate to each organization's needs

Supporting Tools & Insight

Engagements may draw upon:

- ORMI™ sector intelligence & environmental scanning
- Executive Strategic Assessment Framework (ESAF)™
- Strategic Agility Diagnostic & Roadmap
- Integrated Strategy–Performance System
- Profession & Stakeholder Landscape Analysis

For more information, contact Jordan Max at jordan@upstreammanagesolutions.com