

STRATEGIC PLANNING

FALCON CONFERENCE 2017

STANDARD PROCESS

- ▶ Define who you are and what you want to accomplish
- ▶ Assess your position and who your partners are
- ▶ Develop goals
- ▶ Develop objectives
- ▶ Develop measurable actions with a schedule for evaluation
- ▶ Then, communicate the plan far and wide

What is Planning?

And why do it?

Strategic Planning

- ▶ It is all about asking questions and making evidence based decisions that over time are measured, tracked, and evaluated.

Strategic Planning

Strategic planning is the process of:

1. Making decisions systematically and with the greatest knowledge of their future impact;
2. Organizing the efforts needed to carry out these decisions;
3. Measuring the results of these decisions against the expectations through organized review

Why

- ▶ People cling to consistency even if it is chaotic or non-productive
- ▶ Planning often breaks the cycle of consistency and sets the organization's sights on a new direction and create new motivations

Famous Quotes

- ▶ If you always do what you've always done, you'll always get what you've always gotten.-Anonymous
- ▶ Insanity-Doing the same things over and over again and expecting different results.-Einstein

Common Process

- ▶ Define who you are
- ▶ Assess your position
- ▶ Set measurable goals
- ▶ Set measurable objectives (actions)
- ▶ Develop Evaluation Process

- ▶ Should then include an internal and external communication plan

Define Who You Are

- ▶ **Mission Statement:** Should describe who you are, what you do, and why.
- ▶ Should be concise and outcome-oriented
- ▶ CMN Example:

As a Land Grant institution of higher education chartered by the Menominee People, the College of Menominee Nation infuses learning with American Indian culture and prepares students for leadership, careers and advanced studies in a multicultural world. The College commits to research and the promotion, perpetuation and nurturance of American Indian language and scholarship

Mission Statements

- ▶ BEST
 - ▶ Smithsonian: The increase and diffusion of knowledge
 - ▶ TED: Spreading Ideas

Define What You Want to Achieve

- ▶ **Vision Statement:** Should demonstrate your hopes for the future.
- ▶ Again, should be concise
- ▶ CMN Example

An American Indian center for lifelong learning, integrating exemplary academic preparation and research to enhance nation building

Vision Statement Examples

▶ Best

- ▶ Smithsonian: Shaping the future by preserving our heritage, discovering new Knowledge, and sharing our resources with the world
- ▶ Google: To organize all of the data in the world and make it accessible for everyone in a useful way

Assessing Position

- ▶ Strength/Weakness/Opportunity/Threat (SWOT)

Or;

- ▶ Environmental Scanning

Or;

- ▶ Appreciative Inquiry

Then

- ▶ Identify Key Stakeholders (Internal and External)

SWOT Analysis

- ▶ Strengths and Weaknesses
 - ▶ Internal Environment
- ▶ Opportunities and Threats
 - ▶ External Environment

Developing the Strategic Plan

Listing Internal Factors: STRENGTHS

- ▶ Strength (*noun*)
 1. the quality or state of being strong, in particular.
 2. a good or beneficial quality or attribute of a person or thing.
- ▶ List strengths within your team's scope of analysis
 - dotted line boundaries—ok to paint outside the lines, within reason
- ▶ Watch for “hidden” strengths
 - Seek multiple perspectives
 - Avoid groupthink
- ▶ Look for triangulation and for outliers

Developing the Strategic Plan

Listing Internal Factors: WEAKNESSES

- ▶ Weakness (*noun*)
 1. the quality or state of being weak
 2. a quality or feature that prevents someone or something from being effective or useful
- ▶ List weaknesses within your team's scope of analysis
- ▶ Watch for "blind spots"
- ▶ Be brutally honest
- ▶ Look for triangulation and for outliers

Developing the Strategic Plan

Listing External Factors

(opportunities & threats)

- ▶ Forces and facts that your institution does not control include:
 - Future trends - in your sector, society or the culture
 - The economy - local, national, or international
 - Funding sources - foundations, donors, legislatures
 - Demographics - changes in the age, race, gender, culture of those you serve or in your area
 - Physical environment - facilities, location, land, etc.
 - Legislation - funding, regulations, policies, etc.
 - Local, national or international events

Developing the Strategic Plan

Listing External Factors:

OPPORTUNITIES

- ▶ Opportunity (*noun*)
 1. a favorable juncture of circumstances
 2. a good chance for advancement or progress.
- ▶ List opportunities within your team's scope of analysis, but cast a wide net
- ▶ Think big, bold and creatively
 - Look for news ways of working, new approaches, new configurations
 - Play offense - look to score
 - Be optimistically pragmatic

Developing the Strategic Plan

Listing External Factors: THREATS

- ▶ Threat (*noun*)
 1. someone or something that could cause trouble, harm, etc.
 2. the possibility that something bad or harmful could happen.
- ▶ List threats within your team's scope of analysis
- ▶ Treat threats at face value (yes, every threat could be viewed as an opportunity)
- ▶ Think about "competition" in the broadest sense
- ▶ Find the "healthy cynic" within you

Developing the Strategic Plan

SWOT: Identifying Potential

	STRENGTHS	WEAKNESSES
	<ol style="list-style-type: none"> 1. 2. 3. 4. 	<ol style="list-style-type: none"> 1. 2. 3. 4.
OPPORTUNITIES <ol style="list-style-type: none"> 1. 2. 3. 4. 	Opportunity/Strength (OS) Strategies Use strengths to take advantage of opportunities <ol style="list-style-type: none"> 1. 2. 	Opportunity/Weakness (OW) Strategies Overcome weaknesses by taking advantage of opportunities <ol style="list-style-type: none"> 1. 2.
THREATS <ol style="list-style-type: none"> 1. 2. 3. 4. 	Threat/Strength (TS) Strategies Use strengths to avoid or neutralize threats <ol style="list-style-type: none"> 1. 2. 	Threat/Weakness (TW) Strategies Minimize weaknesses to avoid or neutralize threats <ol style="list-style-type: none"> 1. 2.

Environmental Scanning

- ▶ What is going on around you?
 - ▶ Legal and Regulatory Issues
 - ▶ Market Forces, industry trends, competitive analysis
 - ▶ Technology trends and internal capabilities

Appreciative Inquiry

- ▶ Ultimately it is about identifying what you do VERY well, and how you can use those strengths to move forward.
- ▶ Driven by questions
 - ▶ What are the core things that makes this place function at is highest level?
 - ▶ What do you value most about the organization?
 - ▶ What could make the biggest difference to our situation?
 - ▶ What are our next steps to reach that?
 - ▶ How can we support each other in our next steps?

Appreciative Internal Capability Analysis

- ▶ How well the greatest capabilities of the organization match the strategic needs (at multiple levels and perspectives)
- ▶ Is the organization structured to achieve the stated goals

Stakeholders

- ▶ Who does your organization serve (internal)
- ▶ What do those folks bring to the table?
- ▶ How can they contribute to our future?
- ▶ How do we gain their participation and future buy-in?

Stakeholders

- ▶ Who does your organization partner with?
- ▶ Who else COULD the organization partner with?
- ▶ What do those folks bring to the table?
- ▶ How can they contribute to our future?
- ▶ How do we gain their participation and future buy-in?

Goal Setting

- ▶ Once you define who you are and what you want to become, where you currently stand, what you need, and who your partners are...
- ▶ Begin setting goals and objectives. What do you need to achieve (goal) and what steps will get you there (objectives)?

Now Tell People About It!

- ▶ Develop your communication plan

(Useful template in handout)

- ▶ Vital to tell people (internal and external) about what you are doing, where you are heading and how you are going to get there. If you do this, many will join you for your journey, if you don't tell people they can't join or contribute.

Overview

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. These shapes are primarily located on the right side of the slide, creating a modern, layered effect against the white background.

Planning Drivers

- ▶ Strategic-Leadership drives planning with functional input
- ▶ Tactical-Driven by functional areas through objectives and strategies
- ▶ Operational-Employees develop action plans, budget, evaluation measures.

Barriers to Successful Planning

- ▶ Under-funded and ambiguous terms
 - ▶ Goals/Objectives
 - ▶ Action Planning/Program
- ▶ Reward/Recognition systems don't support the results
 - ▶ No sense of urgency
- ▶ Departments have conflicting plans, goals, strategies
 - ▶ Sub-Optimization

Planning Process

1. Assemble Planning Team
 - ▶ Why are we planning?
 - ▶ Are we putting one plan to bed and waking a new one?
 - ▶ What process are we going to use?

Planning Process

- ▶ 2. Develop Mission

What, Whom, How, and Why do we function?

Planning Process

3. Develop Vision(s)

How will we look 10 years from now?

Planning Process

4. Assessing Position

How do we know what needs to be done? What if we don't have enough information?

SWOT/Environmental Scanning/Appreciative Inquiry

External Conditions

Internal Conditions

Or

Appreciative Inquiry

What driving forces effect our goal setting decisions:
political, social, economic, technical, competition,
demographics

Planning Process

5. Identify Stakeholders

Internal

External

Both should also take into consideration the need to expand to include new stakeholders

Planning Process

6. Identify Goals and Objectives

What are the activities needed to meet our vision(s)?

What are the signs along the way to tell us we are moving in the right direction?

Planning Process

7. Identify and Structure Resources

Current Resources

Needed Resources

What do we want to create, change, improve, to meet our goals and objectives?

Planning Process

8. Develop Plan of Action

How do we plan to implement our strategic plan?

How are we going to measure our success?

How are we going to inform our organization about the strategic plan?

Planning Process

9. Implement Plan of Action and remember planned evaluation will make or break the plan. With no evaluation there is no plan.

Now Tell People About it

Communication Planning

Communication Planning

- ▶ The key to achieving excellence is clear and consistent communication
- ▶ Successful communication begins by identifying each affected group and anticipating the questions and concerns of these groups

Communication Planning

- ▶ Various types of communication that support strategic planning include:
 - ▶ Social Media
 - ▶ Web Sites
 - ▶ Focus Groups
 - ▶ Newsletters
 - ▶ Large Scale Meetings

Communication Planning Steps

1. Stakeholder Analysis identifies internal and external individuals and groups with whom there is a need to communicate.
 - ▶ Anticipate their communication interests, concerns, and needs.
 - ▶ Develop strategies to effectively reach each group as the process begins.

Communication Planning Steps

2. Establish and disseminate consistent messages about the mission and vision of the organization
 - ▶ Promote a shared understanding and communicate those ideas to relevant internal and external groups.
 - ▶ Ensure these statements become a foundation for subsequent planning phases

Communication Planning Steps

3. During the environmental scanning phase of strategic planning gather information relative to:

- ▶ External environment
- ▶ Culture
- ▶ Economic and Political Issues

that impact the organization. Create ways to share results.

Communication Planning Steps

4. Engage key groups to clearly communicate which goals have been selected and why.

Ensures that the internal and external groups understand and accept that the goals chosen for the plan are the right goals.

Title:

Author:

Date Effective:

QUESTION

CORE MESSAGES

What is changing?

Why is it changing?

How does it relate to
our
"Mission/Vison/Values?"

What do you need
me/us to do differently?

How does this help the
community?

What are the skills we
need to use?

Communication Planning Steps

5. **Talk, Talk, Talk**

Terms

- ▶ Important that everyone has the same definitions throughout this process.
- ▶ Following are some of the most important terms to keep in mind

Terms

- ▶ Mission-Brief Statement that is understood by everyone outlining the what, whom, how, and why of an organization. The written description of the purpose of the organization.

Terms

- ▶ Vision-A future oriented description of how an organization will or should operate at some point in the future (ten years).

Terms

- ▶ Goals-SPECIFIC and MEASURABLE accomplishments that need to be met in order to achieve the Mission or Vision
- ▶ Objectives-SPECIFIC and MEASURABLE accomplishments that need to be met in order to achieve the goals.

Terms

- ▶ Communication Plan-Customized message developed and disseminated regarding the direction of the organization.

Next Steps

- ▶ Follow the direct route
 - ▶ Define who you are and what you want to be
 - ▶ Track where you are and what you need
 - ▶ Identify Strategic Issues
 - ▶ Set Goals
 - ▶ Set Objectives
 - ▶ Develop Implementation Plan
 - ▶ Develop evaluation metrics
 - ▶ Tell the world about it