Strategic Planning Team

Agenda

I. **Welcome and Introductions** ………………………………………Jennifer Brackney, CEO

II. **Strategic Planning Process Review**

Goal of the Strategic Planning Team meeting #1 will be to begin identifying key strategic challenges and SWOT analysis

III. **Information Items**
1. Strategic Planning Process and Definitions provided by Strumpf Associates
2. SWOT Analysis

IV. **Other Administrative Matters**
Distribution of binders with worksheets and reference materials

V. **Public Comments**

VI. **Open Discussion**

VI. **Adjournment**

Next Strategic Planning Team Meeting- January 29, 2020

STRATEGIC PLANNING

PROCESS AND DEFINITIONS

by Strumpf Associates: *Center for Strategic Change*

Dialogue Guidelines:

Suspend certainty

Seek to expand the inquiry

Grow ideas rather than taking a position

Listen

Be open rather than attaching to outcomes

Positioning for the Future

- **It is change, continuing change, inevitable change, that is the dominant factor in society today. No sensible decision can be made any longer without taking into account not only the world as it is, but the world as it will be.**
  - *Isaac Asimov*

- **If you don't know where you are going, you will probably end up somewhere else.**
  - *Lewis Carroll*

Strategic Thinking and Management

- Strategic planning is only useful if it supports strategic thinking and leads to strategic management - the basis for an effective organization. Strategic thinking means positioning the organization for future success by anticipating the future environment and always asking 'are we doing the right thing?'

Strategic Management

▶ The application of strategic thinking to the job of leading an organization. The following is a framework for understanding strategic management: continually asking the question, "Are we doing the right thing?" It entails attention to the "big picture" and the willingness to adapt to changing circumstances, and consists of the following three elements:

   ▶ **formulation of the organization's future mission in light of changing external factors such as regulation, competition, technology, and customers**

   ▶ **development of a competitive strategy to achieve the mission**

   ▶ **creation of an organizational structure which will deploy resources to successfully carry out its competitive strategy.**

▶ Strategic management is adaptive and keeps an organization relevant. In these dynamic times it is more likely to succeed than the traditional approach of "if it ain't broke, don't fix it."

Process

Visioning

Environmental Scan

- Focus Groups
- Research

Strategic Planning Team

- Analysis of the data
- Identify strategic challenges
- Develop the strategy for the organization

STRATEGIC CHALLENGES

► THOSE PRESSURES THAT EXERT A DECISIVE INFLUENCE ON AN ORGANIZATION'S LIKELIHOOD OF FUTURE SUCCESS

VISION

- DESIRED FUTURE STATE OF AN ORGANIZATION

    - DESCRIBES WHERE AN ORGANIZATION IS HEADED

    - WHAT IT INTENDS TO BE

    - HOW IT WISHES TO BE PERCIEVED

VISIONING

- A vision is a snapshot in our mind's eye of how we want to look, act, achieve and interface with others at some point in the future.

- What is the future? It is not something waiting for us but it is something we create. The future is time and potential resources waiting to form, the not-yet waiting to be programmed.

- Tomorrow is either the sum of our pasts or the sum of our yearnings for what we may become.

A Vision is:

- A simple picture of what the future means
  - It declares what is important, purposive, and valuable
- A poetic picture, not a literal statement
- A promise that is convincing. To think it is to go for it
- A pull toward it from without and a push toward it from within

A Vision is:

- Energy as much as anything else. We know we have a vision when we get positive energy every time we think of it.

- Like a haunting refrain. We know we have a vision when it won't let us go and others are attracted to it.

- An inspiration and motivation.

Types of Visioning

For individuals – the customer

For the organization to be the best

For the organization's role in the community

VALUES

- GUIDING PRINCIPLES AND/OR BEHAVIORS THAT EMBODY HOW THE ORGANIZATION AND ITS PEOPLE ARE EXPECTED TO OPERATE

- REFLECT AND REINFORCE THE DESIRED CULTURE OF THE ORGANIZATION

- SUPPORT AND GUIDE THE DECISION MAKING OF EVERY EMPLOYEE

MISSION

▶ THE OVERALL FUNCTION OF THE ORGANIZATION – WHAT IS THE ORGANIZATION ATTEMPTING TO ACCOMPLISH?

GOALS

- FUTURE CONDITION OR PERFORMANCE LEVEL THAT ONE INTENDS TO ATTAIN

- BOTH SHORT AND LONG TERM

- ENDS THAT GUIDE ACTIONS

STRETCH GOALS

- ▶ DESIRED MAJOR, NONINCREMENTAL AND BREAKTHROUGH IMPROVEMENTS

STRATEGIC OBJECTIVES

- AN ORGANIZATION'S ARTICULATED AIMS OR RESPONSES TO ADDRESS MAJOR CHANGE OR IMPROVEMENTS

- GENERALLY FOCUSED EXTERNALLY

- WHAT AN ORGANIZATION MUST ACHIEVE TO REMAIN OR BECOME COMPETITIVE

SWOT

- ▶ STRENGTHS

- ▶ WEAKNESES

- ▶ OPPORTUNITIES

- ▶ THREATS

STRENGTHS

ORGANIZATIONAL ENVIRONMENT

ORGANIZATIONAL RELATIONSHIPS

ORGANIZATIONAL CHALLENGES

- COMPETITIVE ENVIRONMENT

- STRATEGIC CHALLENGES

- PERFORMANCE IMPROVEMENT SYSTEM

About Strumpf Associates

▶ Lori Strumpf is president and founder of **Strumpf Associates:** *Center for Strategic Change* (CSC), a firm dedicated to facilitating organizational change in public organizations. The Center's practice is focused on change management consulting in state and local organizations. The primary focus of the company is on organizations that contribute to community development. The firm is dedicated to the vision of developing quality in public service and community based organizations. SA works nationwide as an organizational change consultant, helping public institutions and multi-agency initiatives incorporate, merge, develop boards, and transform organizations to quality managed workplaces. SA provides technical assistance on how to design and implement quality youth and adult programs that move individuals into training, post secondary education and jobs.

▶ Strumpf Associates has assisted over 400 local Workforce Investment Boards develop one stop service delivery systems, improve practices with regard to delivering services to employers, and developing quality data collection and analysis systems that lead to data-driven decision making.

Strumpf Associates: Center for Strategic Change

▶ **Our Mission...**

Managing change. Building systems. Improving quality. Helping organizations re-think their business and refine their services. Strumpf Associates: Center for Strategic Change helps human resource organizations improve the quality of their delivery systems and services by ensuring the connection to workplace skills. We provide technical assistance, leadership training, partnership facilitation, creative problem solving and practical research - all designed to improve customer satisfaction.

Our Vision...

We excel at partnership with our customers to invest our resources, skills, ingenuity, and dedication to create positive change. We seek to do all we can to inspire others to join us and make a difference within their communities.

▶ **What We Do...**

The Center for Strategic Change works with community leaders, policymakers, and program practitioners to:

▶ Facilitate strategic planning

▶ Improve collaborative management

▶ Build leadership teams

▶ Design and improve human resource systems

▶ Develop consolidation strategies

▶ Integrate basic skills and workplace literacy

▶ Implement competency-based, functional context instruction

▶ Design performance management and accountability systems

SWOT Analysis
Handout

Organizational Challenges (Data Based)	Organizational Strengths (to meeting the challenge)	Organizational Weaknesses (that create a barrier to addressing the challenge)	Opportunities (in addressing the challenge)	Threats (posed to the organization if the challenge is not addressed)
1.				
2.				
3.				
4.				
5.				
6.				
7.				

Strumpf Associates