



STRATEGIC PLANNING FOR YOUR STRATEGIC PLAN

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Barney Ellis-Perry

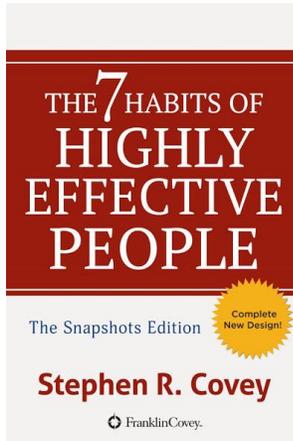
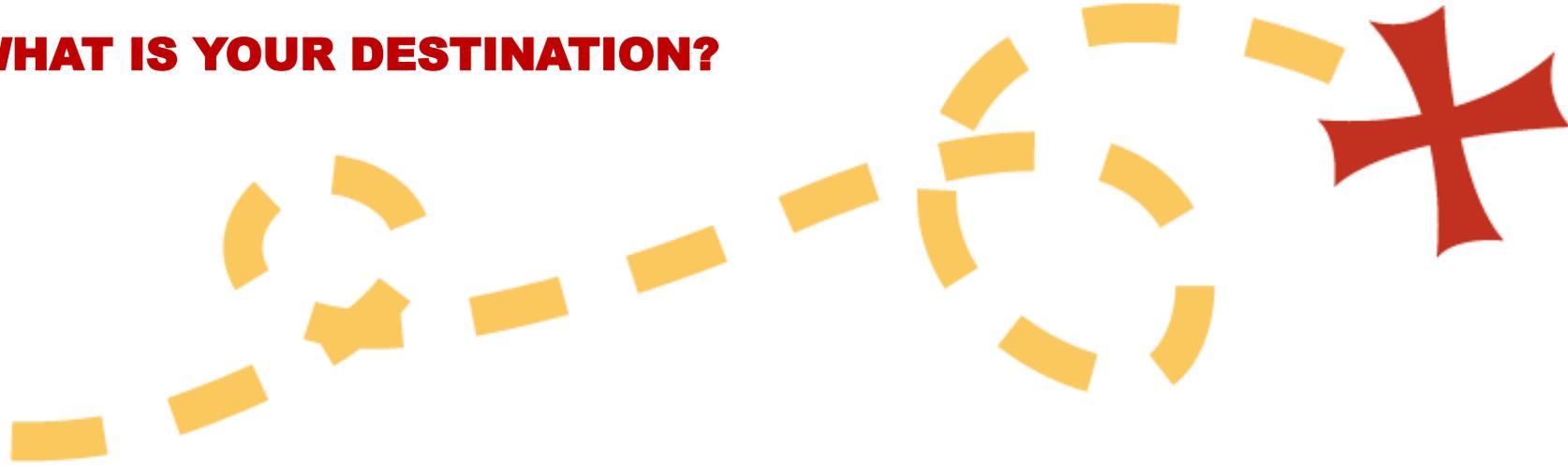
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STRATEGIC PLANNING FOR YOUR STRATEGIC PLAN

OUTCOMES

- ✓ Learn the individual steps of strategic planning
- ✓ Realize the power of mission, vision and values
- ✓ Discover the necessity of an environmental scan
- ✓ Learn the components of a strategic goal driven by metrics
- ✓ Incorporate design thinking with strategy
- ✓ Turn a strategic plan into a work plan
- ✓ Understand how to complement development colleagues

WHAT IS YOUR DESTINATION?



“Begin with end in mind.”

-*Steven Covey*



“Before beginning a Hunt, it is wise to ask someone **what** you are looking for before you begin looking for it.”

-*Winnie-the-Pooh*

STRATEGIC PLANNING FOR YOUR STRATEGIC PLAN

Stated Objectives for a Plan

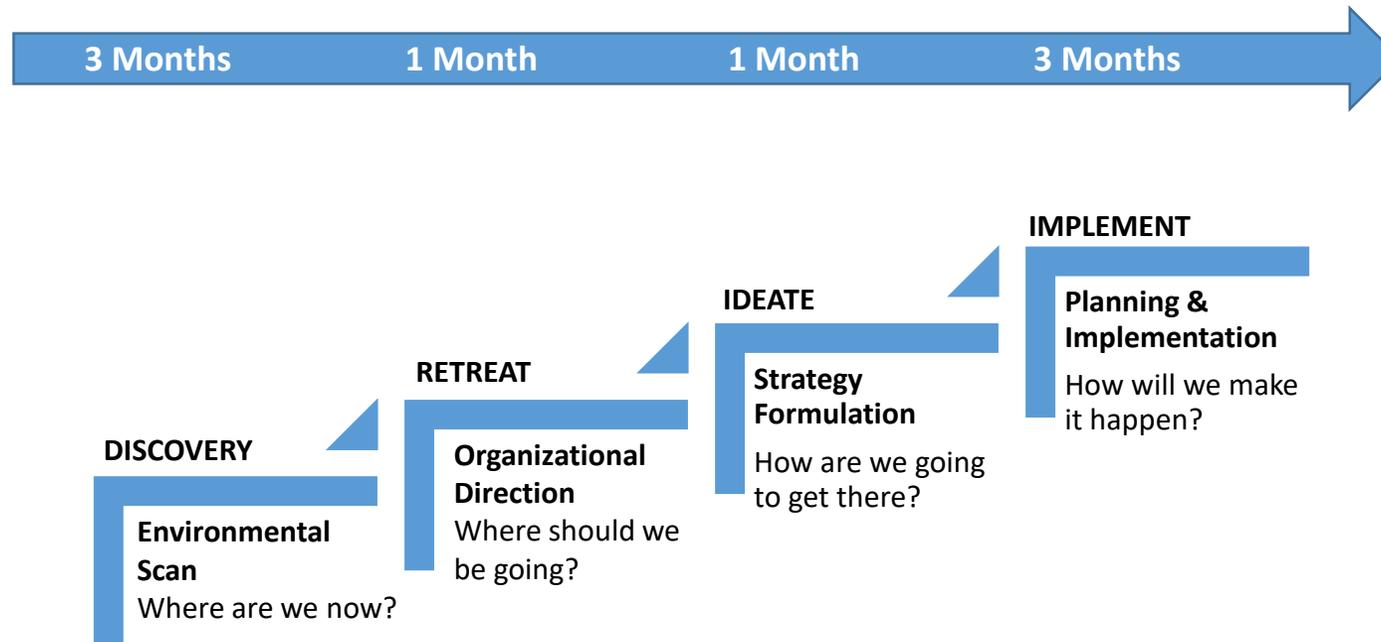
1. Set up a campaign
2. Chart a course for the future
3. Illustrate value to leadership
4. Strategy Change
5. New Organizational Leadership
6. Board Focus

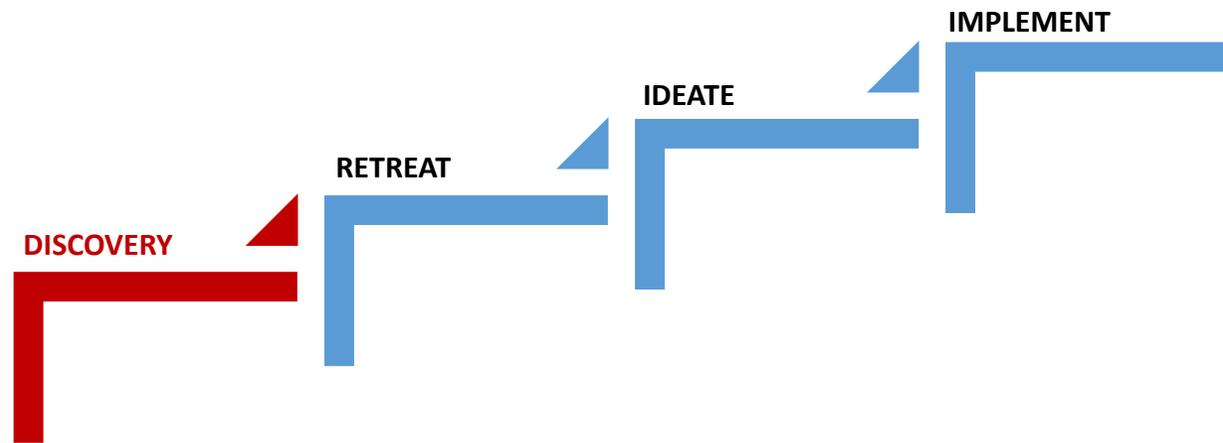
Constituents of the Plan

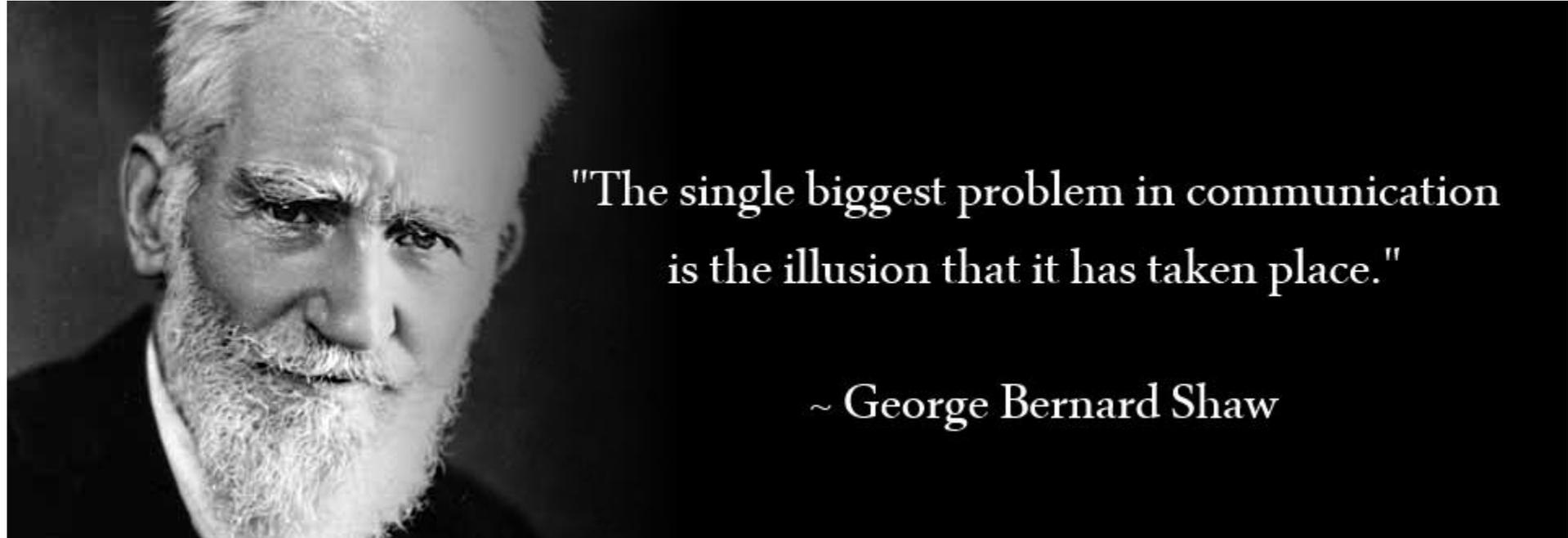
The strategic planning process requires input from the Board, stakeholders and staff. A plan that is "handed down" from a small group of leaders will not have "ownership" among others, and is likely to be ignored or rejected.



STRATEGIC PLANNING TIMELINE





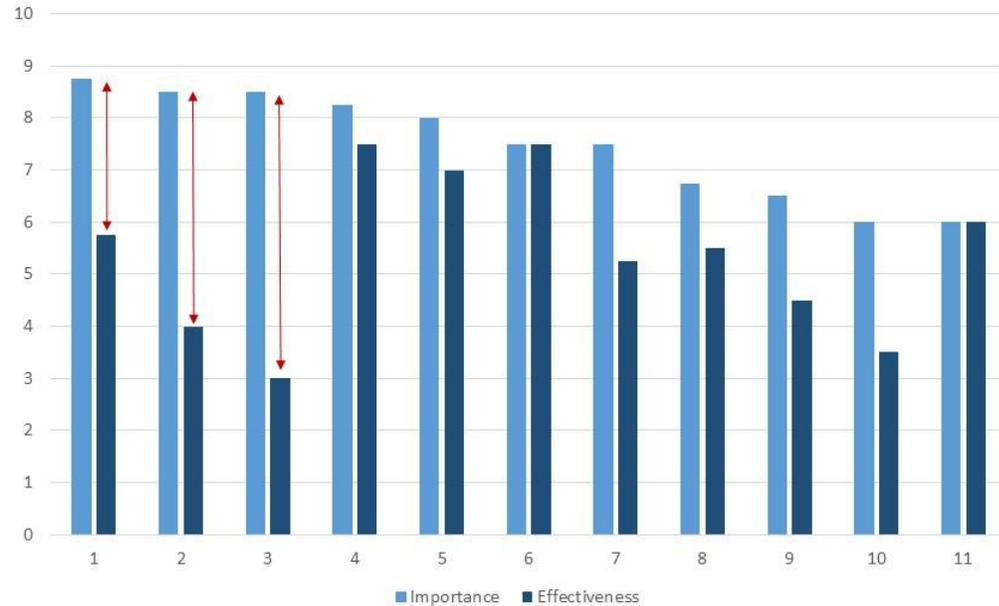


"The single biggest problem in communication
is the illusion that it has taken place."

~ George Bernard Shaw



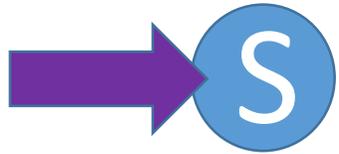
Environmental Scan Results



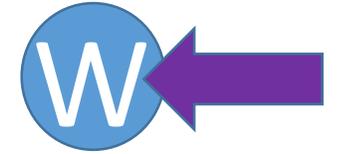
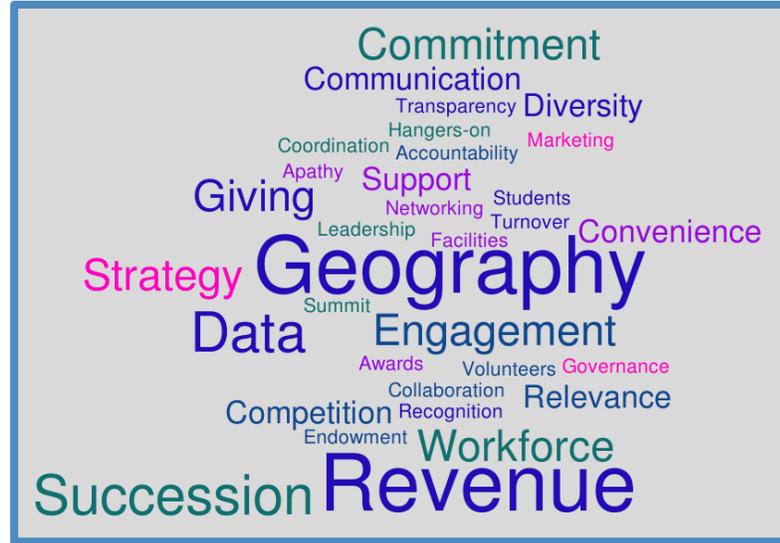
KEY

1. Young Alumni
2. Legislative Advocacy
3. Alumni and student career assistance
4. Inspiring financial generosity
5. Clubs and chapters
6. Awards and recognitions
7. Developing public opinion
8. Encouraging dues and campaign donations
9. Partnering across campus
10. Constituent groups
11. Generating scholarship aid through clubs and constituent groups

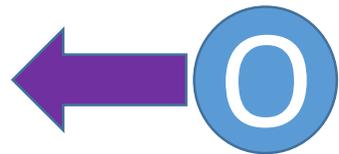




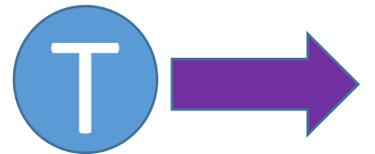
STRENGTH



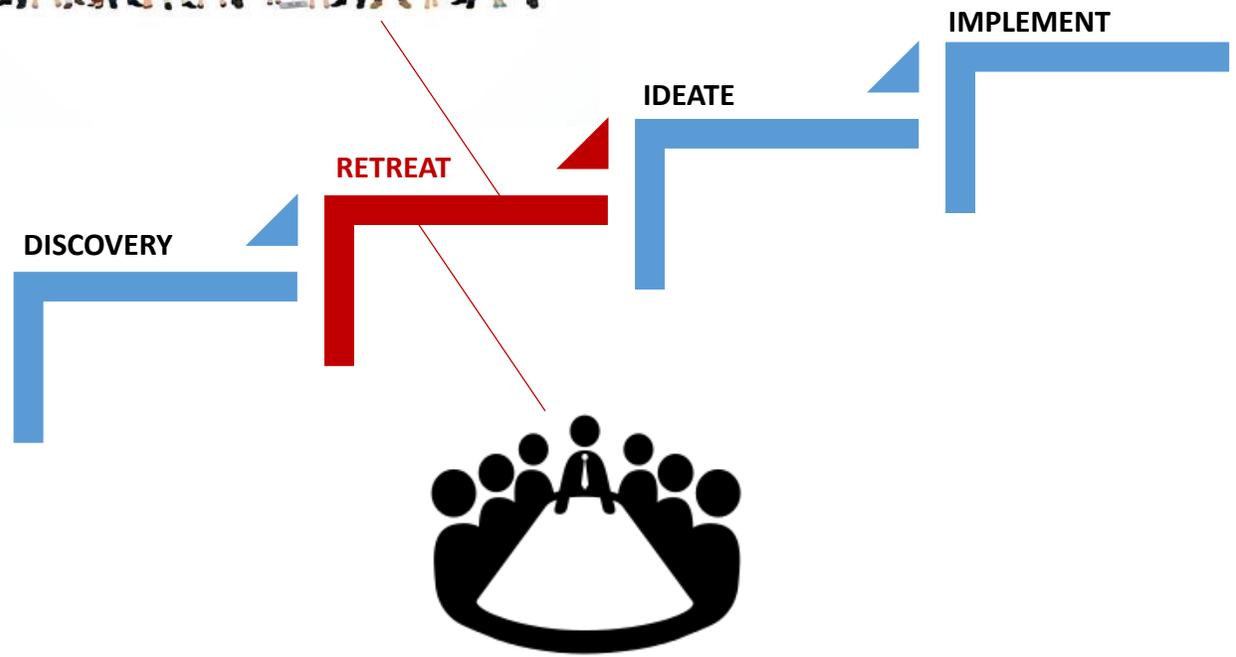
WEAKNESS



OPPORTUNITY



THREAT



THE VISION STATEMENT

“ If at first the
idea is not **absurd**,
then there is no
hope for it.”

— *Albert Einstein*

THE VISION STATEMENT

Definition: (Desired End-State) A one-sentence statement describing the clear and inspirational long-term desired change resulting from an organization or program's work.

APPRECIATIVE INQUIRY →

*“...collective design of a desired **future state** that is compelling and thus, does not require the use of incentives, coercion or persuasion for planned change to occur.”*

E.H. Kessler, (ed.) **Encyclopedia of Management Theory**
http://www.gervasebushe.ca/the_AI_model.pdf

THE VISION STATEMENT

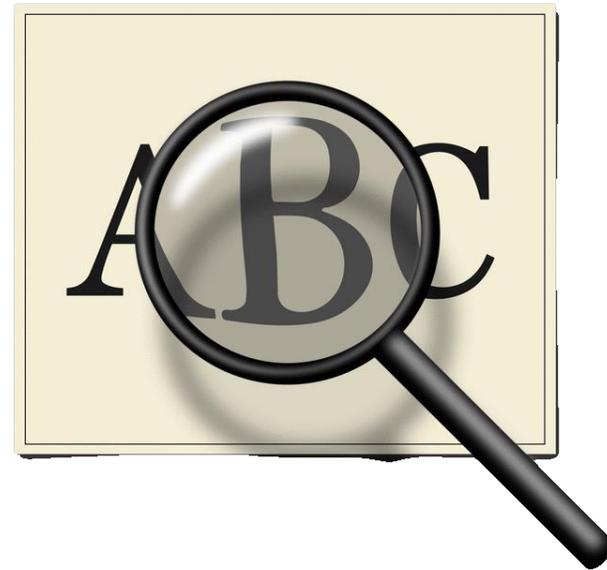
Definition: (Desired End-State) A one-sentence statement describing the clear and inspirational long-term desired change resulting from an organization or program's work.

National Multiple Sclerosis Society *A World Free of MS (5)*
The Nature Conservancy *To leave a sustainable world for future generations. (8)*
Habitat for Humanity *A world where everyone has a decent place to live. (10)*

If the Vision is...

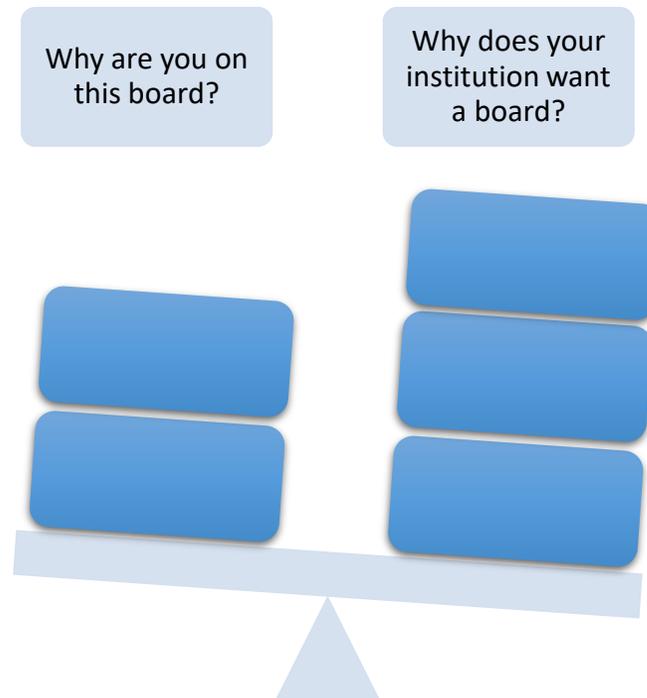


...the Mission is:



THE MISSION STATEMENT

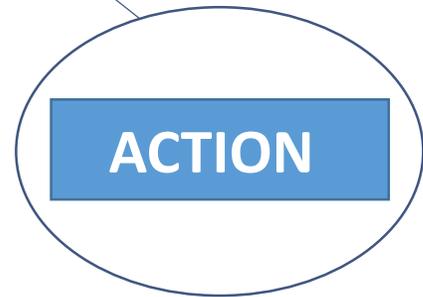
A one-sentence statement describing **WHY** your organization or program exists.





Mission Statement Formula

Why you exist...



+



=

MISSION

Who you exist for....

Mission Statement Formula



ACTION

+

TARGETED BENEFICIARY

= MISSION

SERVICES

PROBLEMS

CAUSE

PARTNERS

THE MISSION STATEMENT

TED	<i>Spreading Ideas. (2 words)</i>
The Humane Society	<i>Celebrating Animals, Confronting Cruelty. (4 words)</i>
Smithsonian	<i>The increase and diffusion of knowledge. (6 words)</i>
Monterey Bay Aquarium	<i>To inspire conservation of the oceans. (6)</i>
Wounded Warrior Project	<i>To honor and empower wounded warriors. (6)</i>



Our mission is advancing yours



VALUES

Your core values should describe the collective attitudes and beliefs that you desire

What do we believe in?

Accountability

Advocacy

Collaboration

Commitment

Communication

Compassion

Conservation

Courage

Creativity

Curiosity

Dependability

Diversity

Equality

Empathy

Excellence

Fairness

Family

Giving

Integrity

Investing

Innovation

Learning

Loyalty

Motivation

Optimism

Passion

Perseverance

Pride

Reliability

Respect

Service Spirit

Teamwork

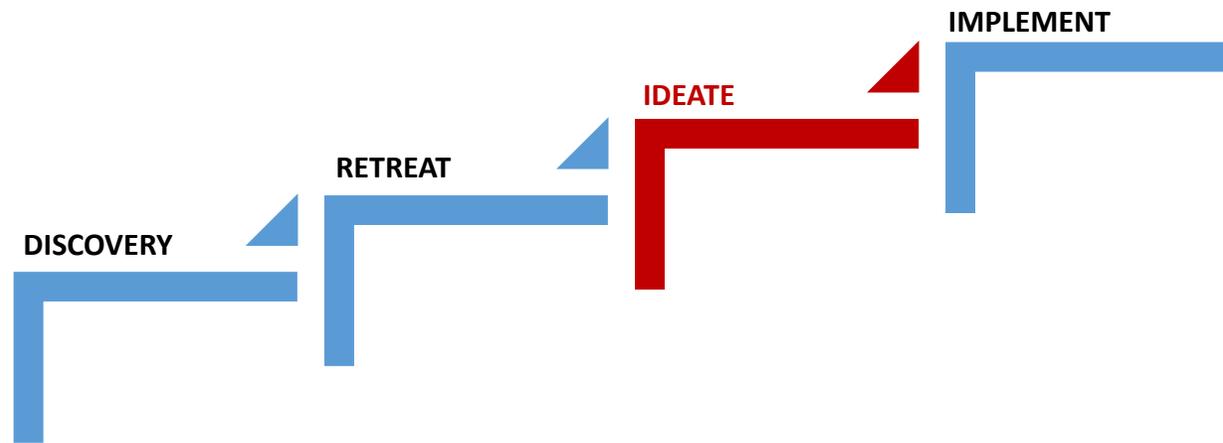
Tolerance

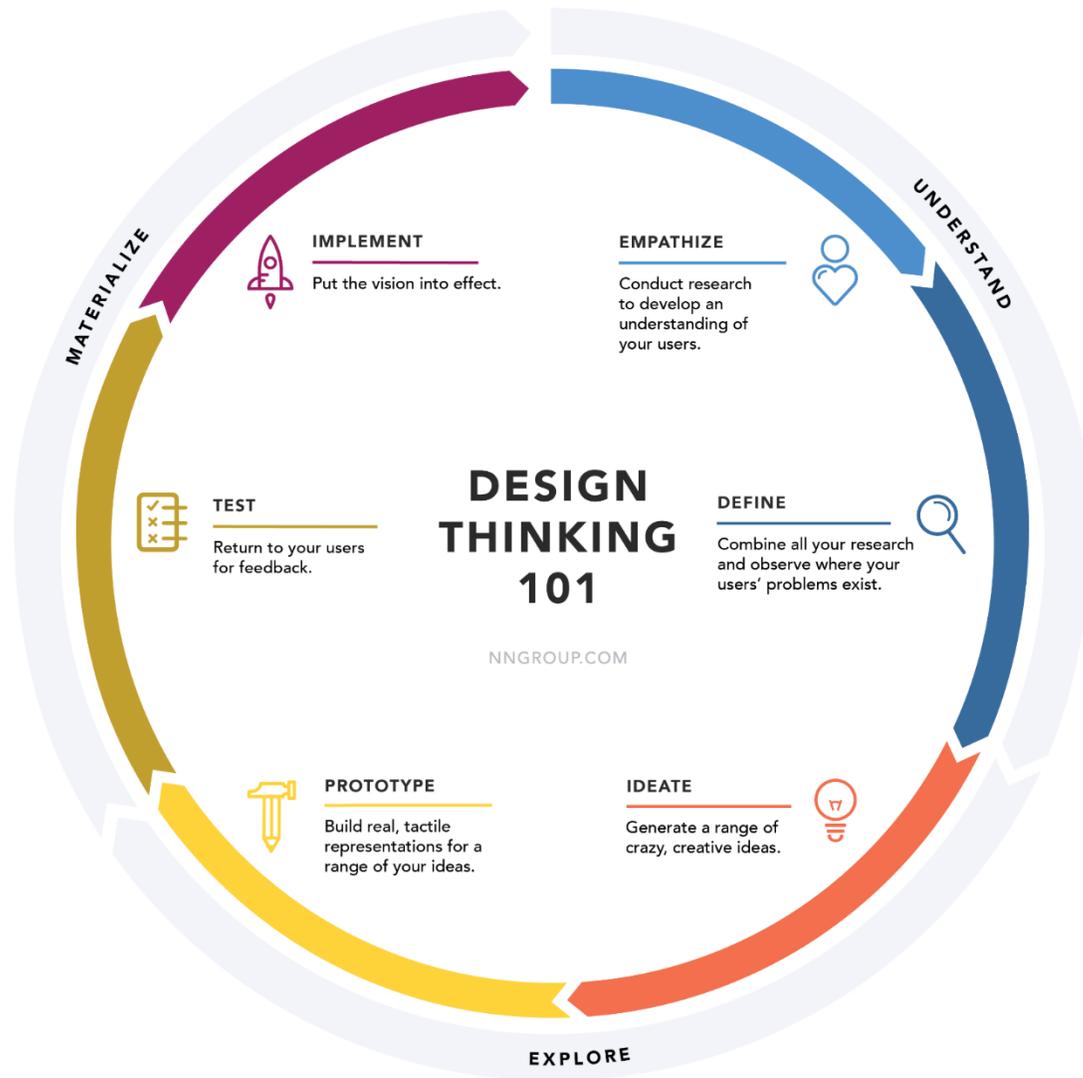
Transparency

Tradition

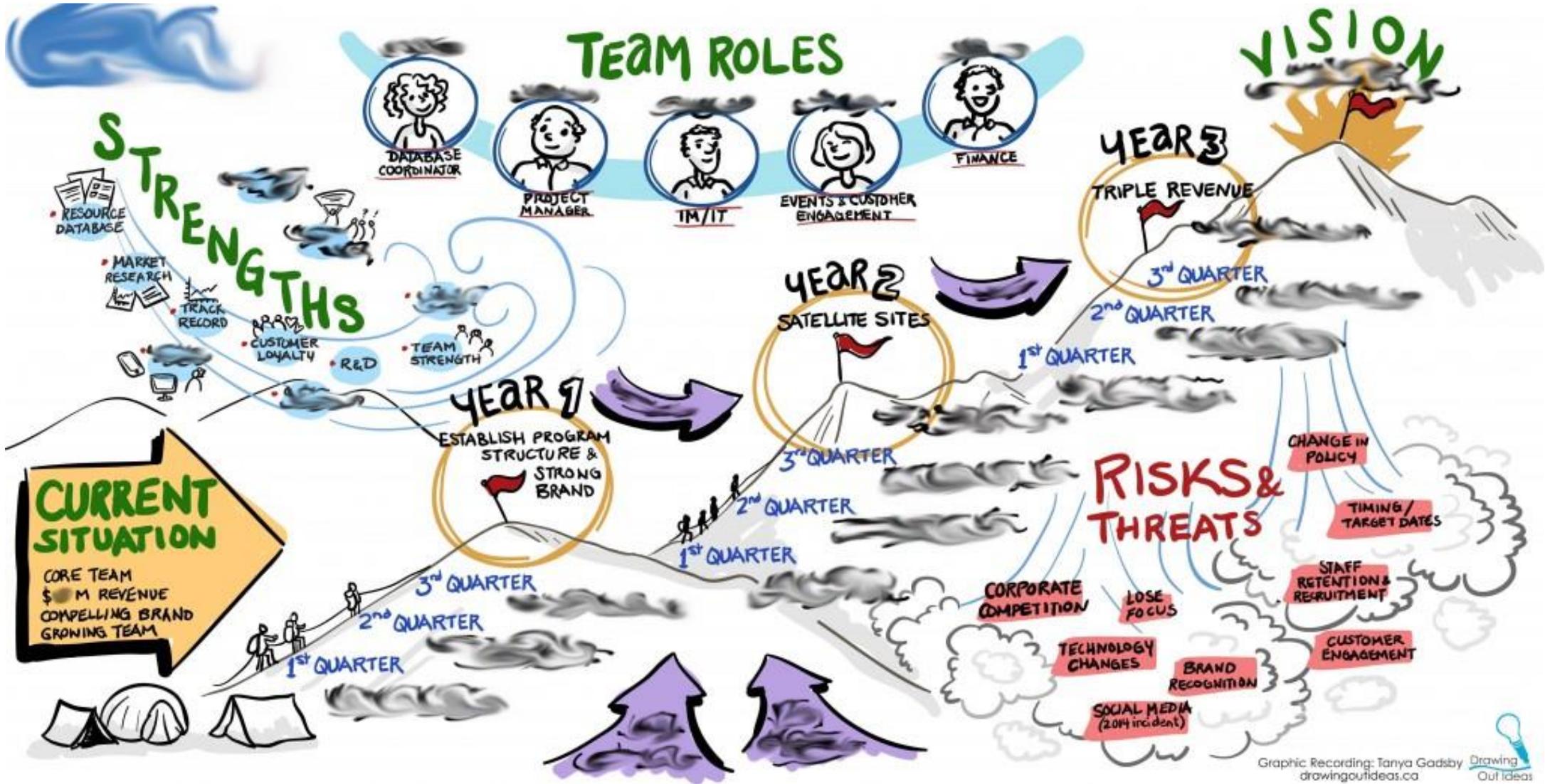
Trust

Wellbeing









Graphic Recording: Tanya Gadsby
drawingoutideas.ca
Drawing Out Ideas

STRATEGIC PLAN

“If everything is important, then nothing is.”

-Patrick Lencioni

Author, *The Five Dysfunctions of a Team*

im·por·tant

/im'pôrtnt/

adjective

of great **significance** or value; likely to have
a **profound** effect on success, survival, or well-being.



STRATEGIC
GOAL

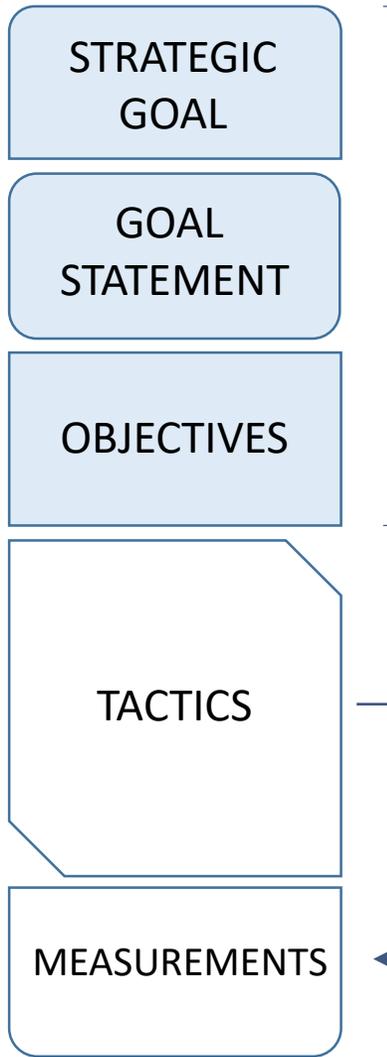
GOAL
STATEMENT

OBJECTIVES

TACTICS

MEASUREMENTS

STRATEGIC BOARD LEVEL



STRATEGIC BOARD LEVEL

Staff develops and presents for board/committee approval.

Board and staff find agreement

Increase our ability to track engagement outcomes

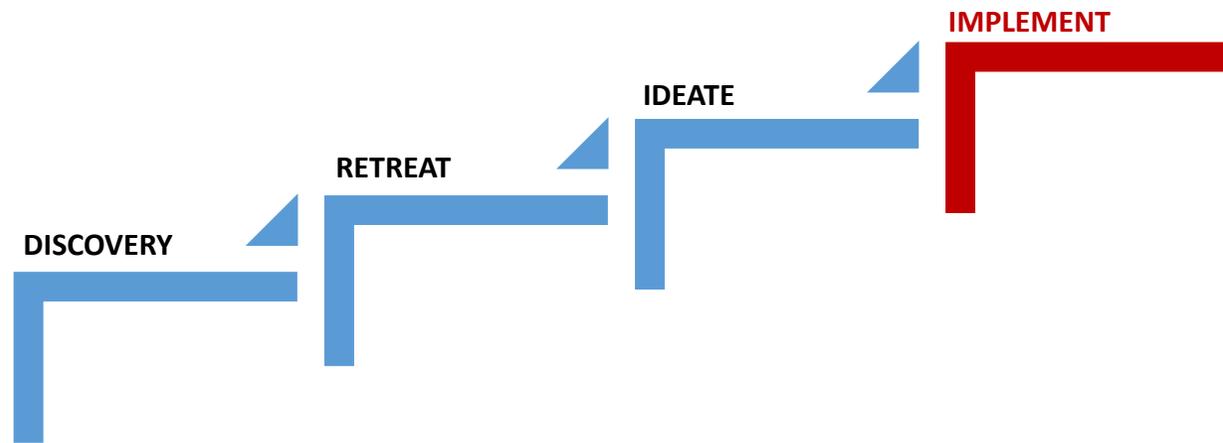
Counting for the sake of counting is not a strategic goal. We will create a system that identifies and measures desired outcomes of our alumni engagement.

1. Include an engagement metric in capital campaign
2. Create a campus partnership that accounts for all alumni engagement
3. Establish a five-year goal with incremental benchmarks
4. Identify desired outcomes and protocols for tracking

Transformational
FY21

Substantive
FY20

Incremental
FY19





Institutional
strategic plan

Your organization's
strategic plan

Unit and individual
work plans

Sharing Your Success

Annual report & meeting

Share with stakeholders

Strategic Plan
Results

Social media

Website

THE STRATEGIC PLAN...STRATEGIC PLAN

GOAL	Plan & Scan the Environment	Articulate Culture	Identify Priorities	Implement Strategy
STATEMENT	<p><i>Our path forward will be informed by asking stakeholders to evaluate the current organization and vigorously imagine its future.</i></p>	<p><i>Self-awareness is an important organizational virtue and we must find agreement on where we want to go, why we exist, and what we value.</i></p>	<p><i>If everything is important then nothing is important. We must identify over-arching goals that will lead us to our vision.</i></p>	<p><i>This must be a living document that informs organizational behavior through measurements that are routinely collected and evaluated for performance.</i></p>
OBJECTIVES	<ol style="list-style-type: none"> 1. Utilize a consulting firm in the planning process 2. Engage staff, administration, volunteers and other interested parties in the planning process 3. Obtain useful qualitative and quantitative data 	<ol style="list-style-type: none"> 1. Identify desired qualities of strategic planning members and recruit planning committee 2. Find consensus on interpretation of quantitative and qualitative data 3. Author organizational mission, vision and values 	<ol style="list-style-type: none"> 1. Find consensus on how the purpose of the plan informs priorities 2. Synthesize data into design thinking process 3. Find consensus on overarching goals 	<ol style="list-style-type: none"> 1. Formulate tactics and measurements for each goal 2. Ensure that goals are budgetary priorities 3. Develop detailed work plans 4. Create regular reporting structure or monitoring results 5. Keep constituents informed
TACTICS	<ol style="list-style-type: none"> 1. Author consulting RFP, distribute and select 2. Identify participant stakeholders; generate list of contact information 3. Communicate to stakeholders purpose of plan and their role in the process 4. Collaborate with consultant on the utility of available survey instruments 5. Design surveys and distribute 	<ol style="list-style-type: none"> 1. Select and invite strategic planning committee 2. Organize, distribute and form conclusions about environmental scan results 3. Research optimal dates and location for retreat 4. Budget, schedule and plan retreat details 5. Host retreat 	<ol style="list-style-type: none"> 1. Review purpose of plan with committee members 2. Conduct specific task workshop groups and report out 3. Identify 3-5 strategic goals 4. Author goal statements and objectives 	<ol style="list-style-type: none"> 1. Staff develops tactics and suggested metrics 2. Tactics and metrics presented to committee for discussion, editing and adoption 3. Metrics collection strategy is generated 4. Create dashboard that features illustration of metrics 5. Connect goals to budget
MEASURES	<ol style="list-style-type: none"> 1. Budget to actual cost of selected consultant 2. Percentage of survey respondents (overall and by category) 3. Percentage of non-completions 4. Number of face-to-face interviews and/or focus groups 	<ol style="list-style-type: none"> 1. Percentage of committee members who attend retreat 2. Budget v. actual cost 3. Mission statement fits on t-shirt (and everyone wants to wear it) 	<ol style="list-style-type: none"> 1. Agreement on 3-5 goals featuring clear goal statements and objectives 2. Committee acknowledgement of their strategic role 	<ol style="list-style-type: none"> 1. Staff and committee agree on tactics and measurements 2. Consensus reached on frequency of metric review 3. Goals are illustrated as line items in next budget



10 COMMON PITFALLS

1. Not getting support early from people who matter
2. Ineffective pre-planning
3. Failing to address and resolve current problems
4. Trying to do everything immediately
5. Developing Mission, Vision, Values statements that lack substance
6. The plan doesn't emphasize accountability
7. Missing the things you could have predicted
8. Vague action steps
9. Failing to communicate broadly
10. Not tracking progress effectively

THE ALUMNI RELATIONS PRACTICE AREA AT GG+A HAS PARTNERED WITH:



**Megan
Williamson**

- + Aalto University
- + American College of Financial Services
- + American School of Milan
- + American University
- + Anderson University
- + Buckingham Browne & Nichols School
- + Cambridge School of Weston
- + Capital University
- + Case Alumni Association
- + Case Western Reserve University
- + Catholic University of America
- + College of DuPage
- + College of Saint Elizabeth
- + Columbia University
- + Cornell University
- + Creighton University
- + Drexel University
- + Duke University
- + Episcopal Academy
- + EP-Nuffic
- + Florida Atlantic University
- + Fuller Theological Seminary
- + Grenoble Graduate School of Business
- + Hebrew Union College - Institute of Religion
- + Illinois Mathematics and Science Academy
- + IE Spain
- + IMD
- + Indiana University of Pennsylvania
- + Indiana University Purdue University Indianapolis
- + Johns Hopkins University
- + Johnson & Wales University
- + Knox College
- + KTH Royal Institute of Technology
- + Laureate Education Lehigh University
- + Loyola Marymount University
- + Northampton Community College
- + Northwestern Alumni Association
- + Nova Southeastern University
- + Occidental College
- + Oregon Health Sciences University
- + Oregon State University Alumni Association
- + Oregon State University Foundation
- + Pennsylvania State University, University Park
- + Pepperdine University
- + Population Council
- + Rhode Island College
- + Rockefeller Foundation
- + Rowan University
- + Saint Joseph's University
- + Scripps College
- + Southeastern Louisiana University
- + Temple University
- + Texas Christian University
- + Tufts University
- + University College Dublin
- + University of Arizona Alumni Association
- + University of British Columbia
- + University of California Office of the President
- + University of California Santa Barbara
- + University of Dayton
- + University of Florida College of Law
- + University of Idaho
- + University of Illinois Alumni Association
- + University of Manitoba
- + University of Maryland Baltimore County
- + University of Massachusetts Amherst Alumni Association
- + University of Phoenix
- + University of Rochester
- + University of Toledo
- + University of Toronto
- + Virginia Polytechnic Institute and State University
- + Warwick University
- + Western Kentucky University
- + William Marsh Rice University
- + Winston Churchill Foundation



How We Can Help:

+Customized alumni program reviews and recommendations

+Metrics and measurement advice and systems

+Ongoing counsel to advise leadership

+Strategic planning

+Surveys, benchmarking studies, and comparative analysis

+Training workshops and guidance for volunteers, board, and staff

+Dual goal campaigns with non-monetary goal setting

Our Mission is Advancing Yours

Thank you

GG+A

Grenzebach
Glier and
Associates