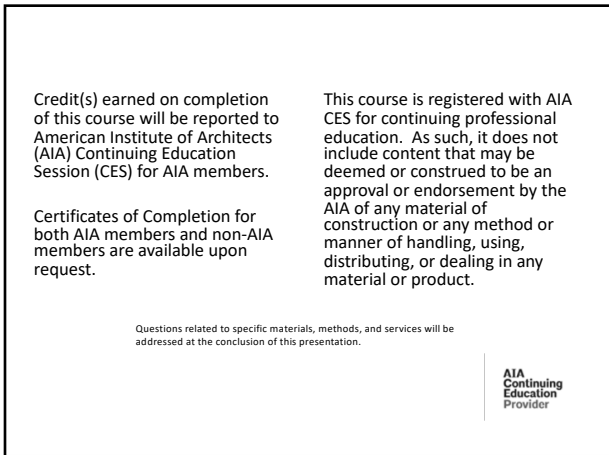
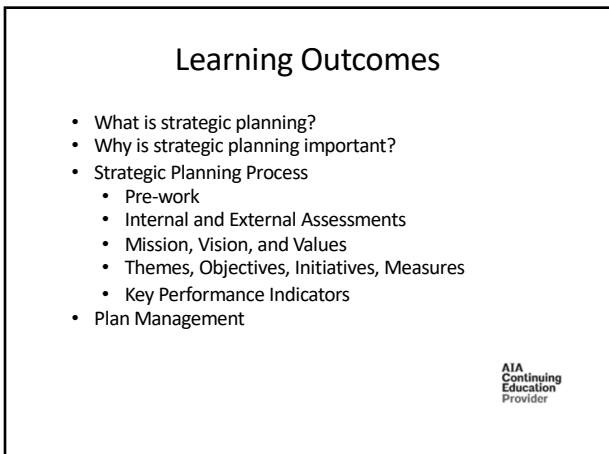




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3

What is Strategic Planning?

Strategic planning is a process in which an organization defines a vision for the future and identifies goals and objectives that will bring the vision into focus.

4

Why is Strategic Planning Important?




5

Strategic Planning Process


- Pre-work
- Internal and External Assessments
- Mission, Vision, and Values
- Themes, Objectives, Initiatives, Measures
- Key Performance Indicators

6


Pre-work




Planning team composition



Strategic planning workshop format and development



Schedule



Potential impediments and organizational issues

7

Internal and External Assessments

- **Strengths** of the organization
- **Weaknesses** of the organization
- **Opportunities** facing the organization
- **Threats** challenging the organization


8

SWOT Analysis

Strengths are important as they represent areas of the organization to be built upon, and weaknesses are areas to be identified as potential sources for improvement. Opportunities are vital to the future of the organization and should be viewed as positive prospects for growth and enhancement, while threats must be identified and addressed in advance, where possible.

9

Facilitation Options



SMALL GROUPS ELECTRONIC SURVEY UNIT MEETINGS

10

Practice

1. Create a university at your table.
2. Combine your experience and conduct a SWOT analysis.
3. Document all data points.

(10-15 minutes)

11

Gap Analysis

- Use the APPA FMEP/AFE criteria
 - Leadership
 - Facilities Strategic and Operational Planning
 - Customer Focus
 - Assessment and Information Analysis
 - Development and Management of Human Resources
 - Process Management
 - Performance Results

12


Facilitation Options



The graphic shows two circular icons side-by-side. The left icon contains a white checkmark on a dark grey background. The right icon contains a white person silhouette on a dark grey background. Below each icon is its corresponding text: 'SELF EVALUATION' and 'CONSULTANT'.

SELF EVALUATION CONSULTANT


13



A large white oval is centered on a dark grey background. The text 'Vision, Mission, and Values' is written inside the oval. A dashed black line curves around the top-left corner of the oval, and a small grey circle is at the bottom-right corner of the oval.

Vision, Mission,
and Values

14



A dark grey oval on the left contains the text 'Vision, Mission, and Values'. To its right is a bulleted list. A dashed black line curves above the list, and a small grey circle is at the bottom-left corner of the oval.

Vision,
Mission,
and
Values

- Vision statements describe the way the organization views itself in the future
- Mission statement describes the purpose for which the organization exists
- Values enumerate the principles or ideas that are important to the members

15

University of Chicago

- Vision: A campus leader and partner who creates and sustains an exceptional physical environment and delivers excellent service to the University, inspiring a sense of place and belonging to advance world-renowned education and research.
- Mission: Together, We Create And Sustain Environments To Advance The Mission Of Our University.
- Core Values: Collaboration, Diversity, Excellence, Inclusion, Innovation, Respect, Safety
- Motto: Build and Maintain Excellence

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University of Iowa

- Vision: Always there, always the best.
- Mission: Providing a physical environment that supports university excellence.
- Core Values: Stewardship • Innovation • Community • Safety • Pride

17

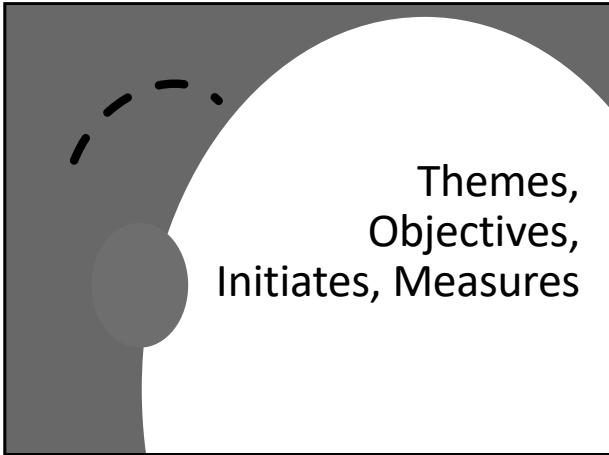
Northwestern

- Vision: Facilities will deliver effective and reliable services as a collaborative and valued partner.
- Mission: To deliver a safe, sustainable, and reliable campus environment as a trusted business partner to the University community.
- Core Values: Respect • Integrity • Safety • Excellence

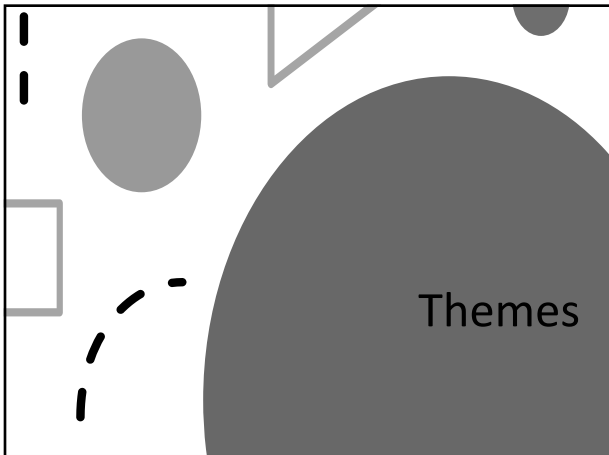
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20



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Theme Development

- 7 AFE Categories
- Code data generated during the assessment phase

22

Sample

Where To Be In 2023							Status	
INITIATIVE	MEASURE	UNIT	PROJECT LEAD	RUE DATE	STATUS	START DATE	END DATE	
OBJECTIVE 1.1 - Invest in Training and Professional Development								
111	Staff participation in training sessions, meetings, and conventions. Consider webinars and webinars.com etc. Develop a training calendar and maintain it.	ST	Joe Smith	12/31	On Track			
112	Develop a program for approved leave and non-credit taking, earned and unused, to ensure employees can take advantage of training opportunities.	FBS	Joe Smith	12/31	On Track			
113	Attend and staff representation at professional events.	FBS, OPS, DR	Joe Smith	12/31	On Track			
114	Present at national and regional conferences.	FBS	Joe Smith	12/31	On Track			
115	Provide employee tuition aid. Benchmark current efforts to show increase over time.	FBS	Joe Smith	12/31	On Track			
116	Identify and fund training resources for the most promising staff.	FBS	Joe Smith	6/30	On Track			
117	Provide one of the professional development programs.	FBS	Joe Smith	6/30	On Track			
118	Identify career tracks and establish core competencies for potential promotion with each track.	FBS	Joe Smith	6/30	On Track			
119	Conduct track training sessions with staff.	FBS	Joe Smith	6/30	On Track			
120	Use GPTI or GMSAS information for stability and compliance.	OPS	Joe Smith	6/30	On Track			
OBJECTIVE 1.2 - Promote Positive Employee Health and Engagement								
121	Employee Feedback Survey is initiated annually and historical trends are tracked and distributed.	FBS	Joe Smith	6/30	On Track			
122	Make reports available to staff and provide strategic recommendations regarding work/life integration of trends.	ST	Joe Smith	6/30	On Track			
123	Conduct the staff engagement survey.	FBS	Joe Smith	6/30	On Track			
124	Implement the staff suggestion box to offer anonymous/feedback for resources.	FBS	Joe Smith	6/30	On Track			
125	Implement the staff suggestion box to offer anonymous/feedback for resources.	FBS	Joe Smith	6/30	On Track			
126	Implement the staff suggestion box to offer anonymous/feedback for resources.	FBS	Joe Smith	6/30	On Track			
127	Implement the staff suggestion box to offer anonymous/feedback for resources.	FBS	Joe Smith	6/30	On Track			

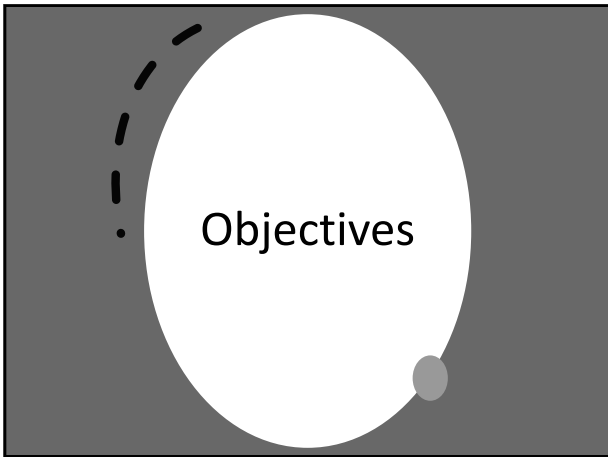
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Practice

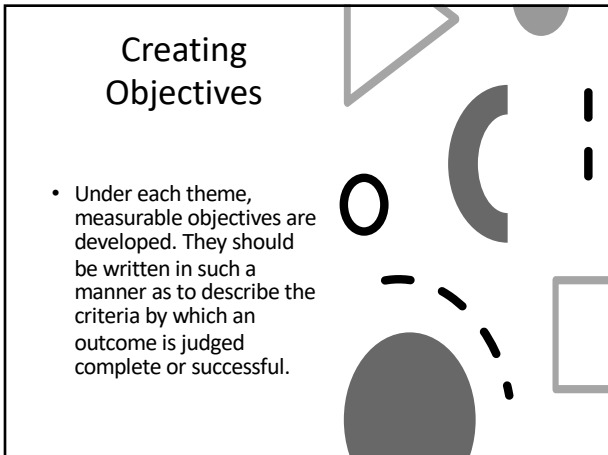
1. Bucket your SWOT data points.
2. Name your buckets.

(10-15 minutes)

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25



26

Sample

Where To Be In 2023

INITIATIVE	MEASURABLE	RESPONSE	UNIT	PROJECT LEAD	DUPLICATE	STATUS
OBJECTIVE 1.1 - Invest in Training and Professional Development						
111	Staff participation in training sessions, meetings, and conferences. Consider webinars and	111.1	Staff	111	111	111
112	Develop a program for quarterly lunch and learn sessions for internal and external sources.	112.1	Staff	112	112	112
113	Allocate budget and opportunities for staff to attend training.	113.1	Staff	113	113	113
114	Conduct professional development sessions for staff and managers.	114.1	Staff	114	114	114
115	Provide employee training on time management, communication, and other business essential	115.1	Staff	115	115	115
116	Allocate at least one training resource to the training program.	116.1	Staff	116	116	116
117	Prioritize use of the Professional Development Program.	117.1	Staff	117	117	117
118	Monitor use of the Professional Development Program.	118.1	Staff	118	118	118
119	Develop and track and establish new competencies for general accountability within each	119.1	Staff	119	119	119
120	Develop and track and establish new competencies for general accountability within each	120.1	Staff	120	120	120
121	Monitor employee use of the Professional Development Program.	121.1	Staff	121	121	121
122	Monitor employee use of the Professional Development Program.	122.1	Staff	122	122	122
123	Monitor employee use of the Professional Development Program.	123.1	Staff	123	123	123
124	Monitor employee use of the Professional Development Program.	124.1	Staff	124	124	124
125	Monitor employee use of the Professional Development Program.	125.1	Staff	125	125	125
OBJECTIVE 1.2 - Promote Positive Employee Morale and Engagement						
126	Employee Feedback Survey is initiated annually and historical trends are tracked and	126.1	Staff	126	126	126
127	Make results available to staff and provide strategic recommendations regarding	127.1	Staff	127	127	127
128	Monitor employee morale and engagement.	128.1	Staff	128	128	128
129	Prioritize the virtual suggestion box.	129.1	Staff	129	129	129
130	Monitor the virtual suggestion box to offer a national credit card for response.	130.1	Staff	130	130	130
131	Monitor communication and feedback to include a process for employee response for	131.1	Staff	131	131	131
132	Monitor communication and feedback to include a process for employee response for	132.1	Staff	132	132	132
133	Monitor communication and feedback to include a process for employee response for	133.1	Staff	133	133	133

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Practice

1. Pick one theme and develop 3 objectives.

(10 minutes)

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Initiatives

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Initiatives

- An initiative describes "what" will be done.
- There can be more than one initiative associated with each objective.

30

Establishing Measures



A measure defines "how" you will accomplish your initiative.



There can be many measures associated with a single initiative.

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Sample

Where To Be In 2023

Area	Initiative	Measure	Start	End	Priority	Lead	Owner
0001000 1.1 - Invest in Training and Professional Development	111 Allocate budget and opportunities for staff to attend training	111.1 Staff participation in training, sessions, meetings, and conventions. Consider webinars and	01/01	12/31	High	See Staff	0020 and 0020
		111.2 Develop a program for quarterly and non-attending internal and external courses.	01/01	12/31	High	See Staff	0020 and 0020
		111.3 Incorporate cross and training opportunities.	01/01	12/31	High	See Staff	0020 and 0020
		111.4 Submit presentations to national and regional conferences.	01/01	12/31	High	See Staff	0020 and 0020
		111.5 Present employee speakers at American Speech-Language-Hearing Association annual state	01/01	12/31	High	See Staff	0020 and 0020
		111.6 Attend at least one training measure to the health care practice.	01/01	12/31	High	See Staff	0020 and 0020
		111.7 Present at the Professional Development Program.	01/01	12/31	High	See Staff	0020 and 0020
		111.8 Identify career tracks and evaluate core competencies for potential personal/professional within each	01/01	12/31	High	See Staff	0020 and 0020
		111.9 Present on the National Hearing and Deafness Conference.	01/01	12/31	High	See Staff	0020 and 0020
		111.10 Present at the American Speech-Language-Hearing Association annual state	01/01	12/31	High	See Staff	0020 and 0020
0001000 1.2 - Promote Positive Employee Morale and Engagement	122 Conduct Employee Feedback Survey	122.1 Employee feedback survey to include annual and historical trends are tracked and	01/01	12/31	High	See Staff	0020 and 0020
		122.2 Make work available to staff and provide strategic recommendations regarding	01/01	12/31	High	See Staff	0020 and 0020
		122.3 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020
		122.4 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020
		122.5 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020
		122.6 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020
		122.7 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020
		122.8 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020
		122.9 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020
		122.10 Conduct an annual engagement survey.	01/01	12/31	High	See Staff	0020 and 0020

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Practice

1. Pick one initiative and develop 3 measures (10 minutes)

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Facilitation Options



SMALL GROUP DISCUSSION



SMALL GROUP THAT IS GIVEN TOOLS TO GO OUT AND MEET WITH THEIR UNITS



ELECTRONIC SURVEY



LIVE RANKING IN A LARGE GROUP

37

Plan Management

Define responsibility

Establish timelines

Work breakdown tables

Interim milestones

Check in procedures

Quarterly updates

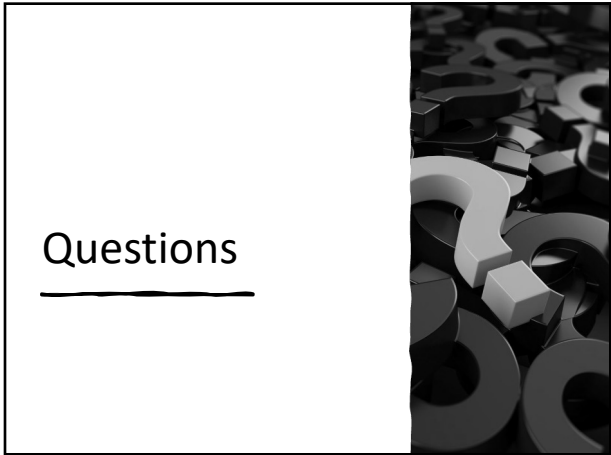
Public access

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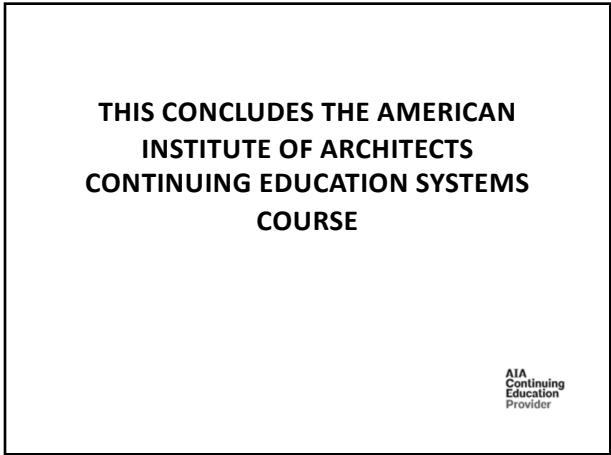
Sample

Where To Be In 2023							STATUS	
INITIATIVE	MILESTONE	MEASURE	UNIT	PROJECT LEAD	DUPLICATE	STATUS	START DATE	END DATE
OBJECTIVE 1.1 - Invest in Training and Professional Development								
111	Allocate budget and opportunities for staff in-house training	111.1 Staff participation in training sessions, meetings, and conventions. Consider webinars and on-line courses as well as in-house training and external courses.	111.1	See Smith	11/23 and Ongoing			
112	Leadership and staff representation at professional events	112.1 Support presentation in national and regional conferences.	112.1	See Smith	11/23 and Ongoing			
113	Ongoing maintenance and promotion of online employee toolkit	113.1 Add at least one training resource to the toolkit per quarter.	113.1	See Smith	11/23 and Ongoing			
114	Ongoing enhancement and promotion of the professional development program	114.1 Career track. Establish measure with each unit.	114.1	See Smith	11/23 and Ongoing			
115	Use CATT's or CANSAS information for ability and compliance	115.1 Annual technical training plan for all technical services.	115.1	See Smith	11/23 and Ongoing			
OBJECTIVE 1.2 - Promote Employee Health and Engagement								
121	Employee Feedback Survey is released annually and historical trends are tracked and distributed.	121.1	See Smith	11/23 and Annually				
122	Continue Employee Feedback Survey	122.1 Make results available to staff and provide strategic recommendations regarding resolution of concerns.	122.1	See Smith	11/23 and Annually			
123	Seek employee feedback	123.1 Promote the virtual suggestion line to offer an optional flexible form for response.	123.1	See Smith	Ongoing			
124	Conduct and engage in regular community outreach such as Safety, Open House events.	124.1 Promote communication regarding resources for employees in regular programs for outreach and engage in regular community outreach such as Safety, Open House events.	124.1	See Smith	Ongoing			

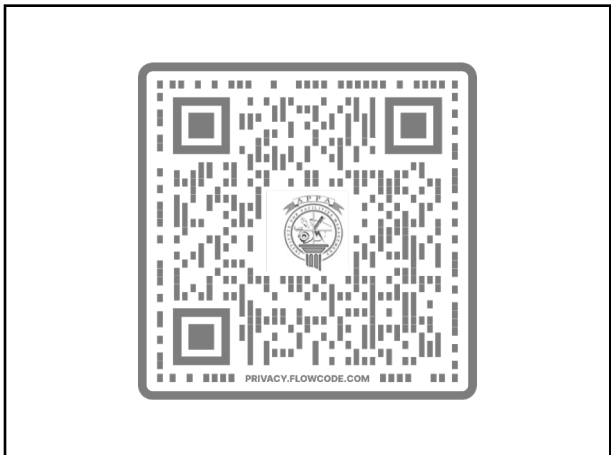
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