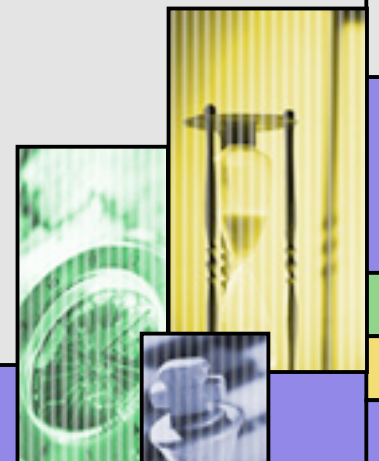


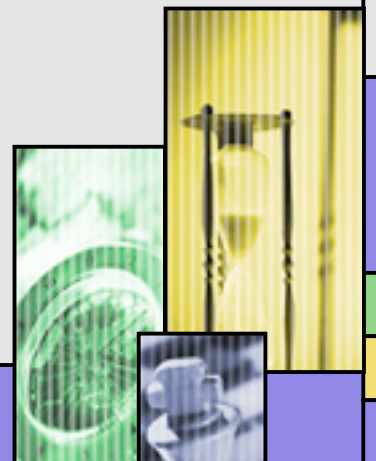
Planning - From Vision to Reality

- The Plan/Do Cycle
- Transformational Planning: Strategics & Future Search
- Planning Tools
- A Hybrid to Set the Stage
- Some Closing Thoughts



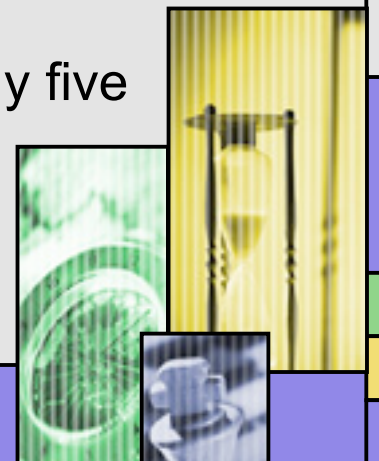
The Plan/Do Cycle

- Deliberation - Action = Frustration
- Action - Deliberation = Risk
- Deliberation + Action = Intentional Change
- Balance is the key



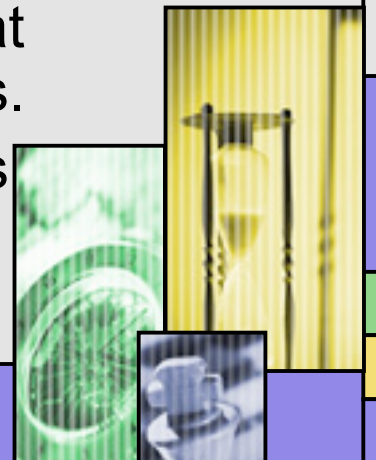
Strategic Planning - Organizational Characteristics (Cook)

- Strategic organizations are autonomous and self governing.
- Strategic organizations have the prerogative and the responsibility to determine their own identity and to actualize that identity.
- Strategic organizations have the prerogative and the responsibility for the acquisition and allocation of resources of all kinds.
- Strategic organizations are responsible for creating and nurturing their own culture.
- Strategic organizations develop long-term plans (usually five to ten years.)



Strategic Planning - Expectations/Needs (Bryson)

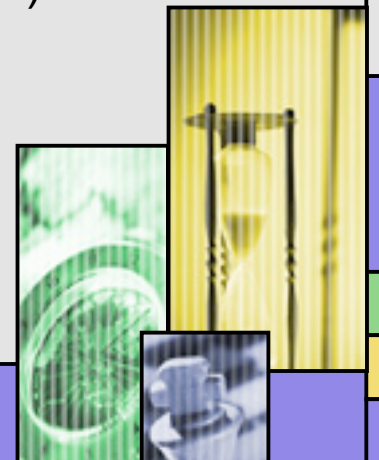
- At least one sponsor (stakeholder) in a position of power and authority to legitimize the process.
- At least one champion to push the process along.
- A strategic planning team.
- An expectation of disruptions and delays.
- A flexible attitude toward what constitutes a strategic plan.
- An ability to pull information and people together at key points for important discussions and decisions.
- A willingness to construct and consider arguments geared to very different evaluative criteria.



Strategic Planning Process - Combining Cook/Bryson (Vandal)

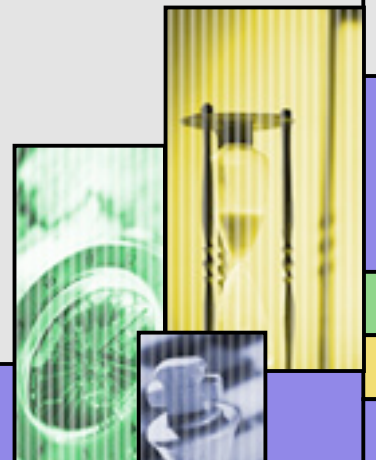
- Initiating and agreeing on a strategic planning process (Bryson)
- Articulating the beliefs of the organization (Cook)
- Establishing the organizational mission (Cook)
- Identifying the organizational mandates: establishing the strategic policies (B & C)
- Assessing the external environment: focus on opportunities and threats, environment, and competition (B & C*)
- Assessing the internal environment: strengths, weaknesses, and organizational structure (B & C*)
- Establishing objectives: determine appropriate outcomes (B & C)
- Formulating strategies to realize objectives (B & C)
- Developing action plans to implement strategies (B & C)
- Establishing an effective organizational vision for the future: a "vision of success." (Bryson)

*interchangeable



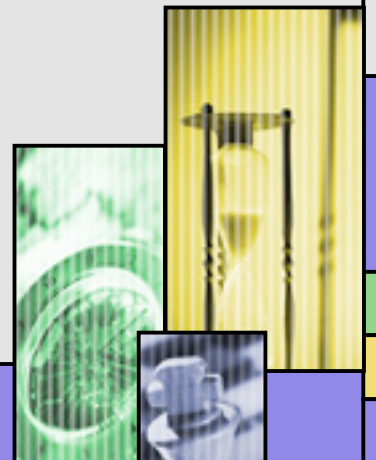
Strategic Planning - The Planning Team (Cook)

- Composition is strategic and operational: people who have “strategic” responsibility (third to half) and people who have operational responsibility.
- Representative of every component group: executives, managers, workers, customers, (competition?), etc.
- Manageable in size: 20 to 25 volunteers and willing draftees.
- The personality mix is important. Include people of good will who are verbal and articulate, people willing to pursue consensus who can subordinate special/personal interests for the good of the organization.
- “Consensus is based on conscience not concession.”



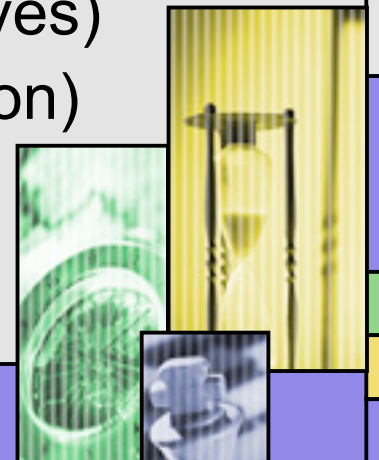
Future Search - Primer

- Quick move to action
- Teams of 60 to 80 participants (parallel process)
- Sixteen hour experience spread over three days
- Mutual learning is a catalyst for voluntary action
- A “search” topic, narrow or broad



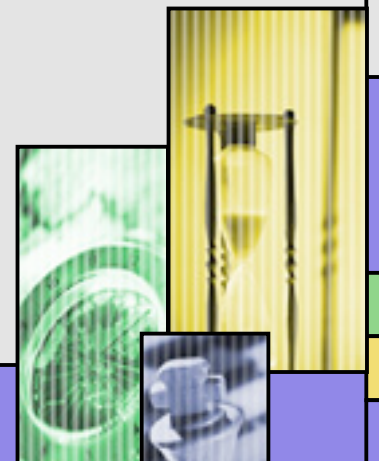
Future Search - Methodology

- Focus on the past (timelines of key events)
- Focus on the present (whole group “mind map” of trends)
- Focus on the present (stakeholder groups respond to trends for now and future; pride/regret)
- Ideal future scenarios (time capsule exercise)
- Identify common ground (diverse groups find themes)
- Confirm common ground (whole group initiatives)
- Action planning (individuals and implementation)



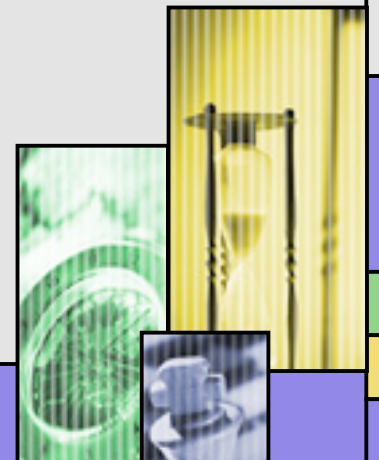
Future Search - Tactics

- Ideal configuration: eight of eight
- Homogeneous (stakeholder) groups selected
- Heterogeneous (diverse) group formed
- Consensus built through common experiences and shared visions
- Sixteen hours to action!



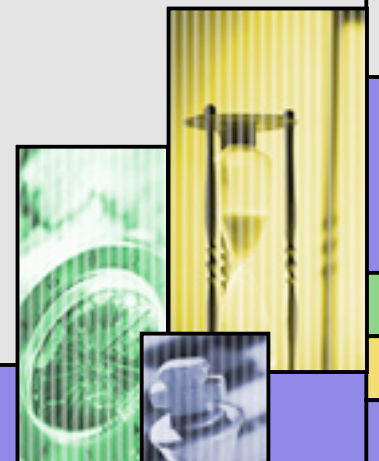
A Hybrid - Community Engagement

- Steering committee “commissions” planning group (6-8)
- Planning group convened for initial visioning (40-50)
- Focus group tied to planning questions (50x3x8=1200)
- Planning group reconvenes: inform/plan/do
- Setting the stage for transformational planning?
- Strategics or Future Search...



Comprehensive Planning

- Improvement of the existing organization
- Identification and assessment of performance, needs, future projections, or expectations
- Restriction to what already exists
- Accreditation/self-studies
- Standards assessment
- Perpetuation of the Institution



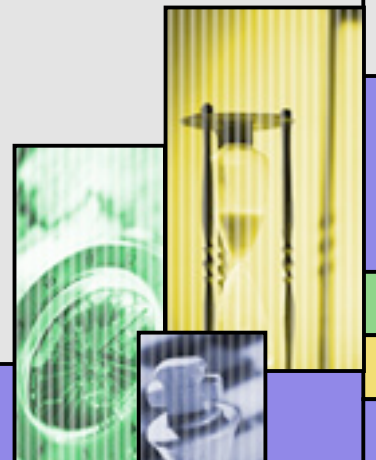
Long Range Planning

- Seeks out intersections with the world
- Prescribes adjustments to reality
- Current operations are the focus - or predetermined initiatives
- No context or connection to disparate plans
- Development in isolation (assumption of congruence)



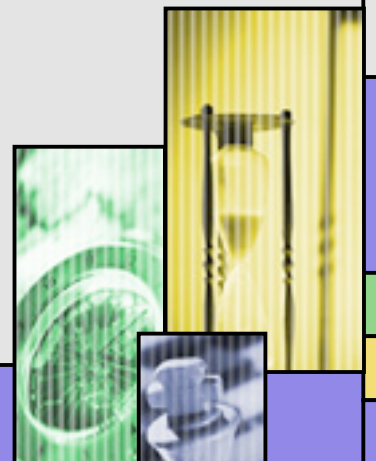
Program Planning

- Creation of a grand design to make a concept operational
- Conducted within the context of a larger organization - tied to their objectives
- Exploratory and evolutionary
- Emphasis on sustaining functions, relationships, and results



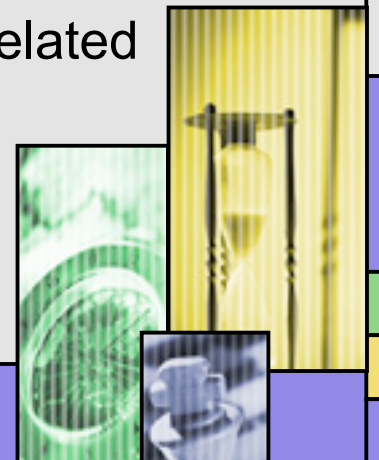
Program Planning Steps

- Identification of subject (hypothesis)
- Assessment/evaluation of need
- Analysis of information
- Verification of need
- Establishment of goals and objectives
- Design of the desired outcomes
- Establishment of monitoring systems
- Evaluation standards/improvement methods created



Project Planning

- Logical, sequential process of advance designing any significant task to accomplish a specific purpose.
- STEPS:
- Identification of the task
- Analysis of the status/situation
- Establishment of the project's objective
- Identification of alternative courses of action
- Analysis of the obstacles and adverse consequences related to each possible course of action
- Decision regarding course of action to be taken



Planning - Closing Thoughts

- Match the planning model to the organization and objective: transformational planning is designed to create; many other methodologies are designed to sustain or improve.
- Leadership engagement is critical - especially in more transformational processes.
- Carefully consider who will be involved - build a group based on your organizational objective.
- Transformational processes beg the need for independent facilitation; they require a planning team and budget.
- A plan is not a substitute for leadership!

Strategic Planning: www.colonialcambridge.com

Future Search: www.futuresearch.net

