

Strategic Planning Overview

FOR COLLEGES/DEPARTMENTS/
ADMINISTRATIVE UNITS

Ruth Johnston, Vice Chancellor

Melody Munson-McGee, Chief of Staff



BE BOLD. Shape the Future.

Workshop objectives

1. Review NMSU LEADS 2025
2. Discuss 30,000 foot view of the philosophy of strategic planning
3. Demonstrate elements of a strategic plan and how to create an implementation plan (aligned with NMSU LEADS 2025)
4. Apply by drafting an outline, aligned with NMSU LEADS 2025, **due dates vary**

Mission

The mission of the New Mexico State University system is to serve the diverse needs of the state through comprehensive programs of education, research, extension and outreach, and public service. As the state's land-grant and space-grant university, and as a Hispanic-Serving Institution, NMSU fosters learning, inquiry, diversity and inclusion, social mobility, and service to the broader community.



BE BOLD. Shape the Future.

Values

Leadership: Promoting and creating the ability for Aggies to shape the future

Excellence: Providing the highest level of education, research, outreach, and service

Access: Welcoming diverse populations to higher education and to the NMSU community

Diversity & Inclusion: Embracing our differences as an asset and actively seeking to include wide-ranging perspectives

Student-Centered: Supporting the education of our students through every aspect of our university, every day

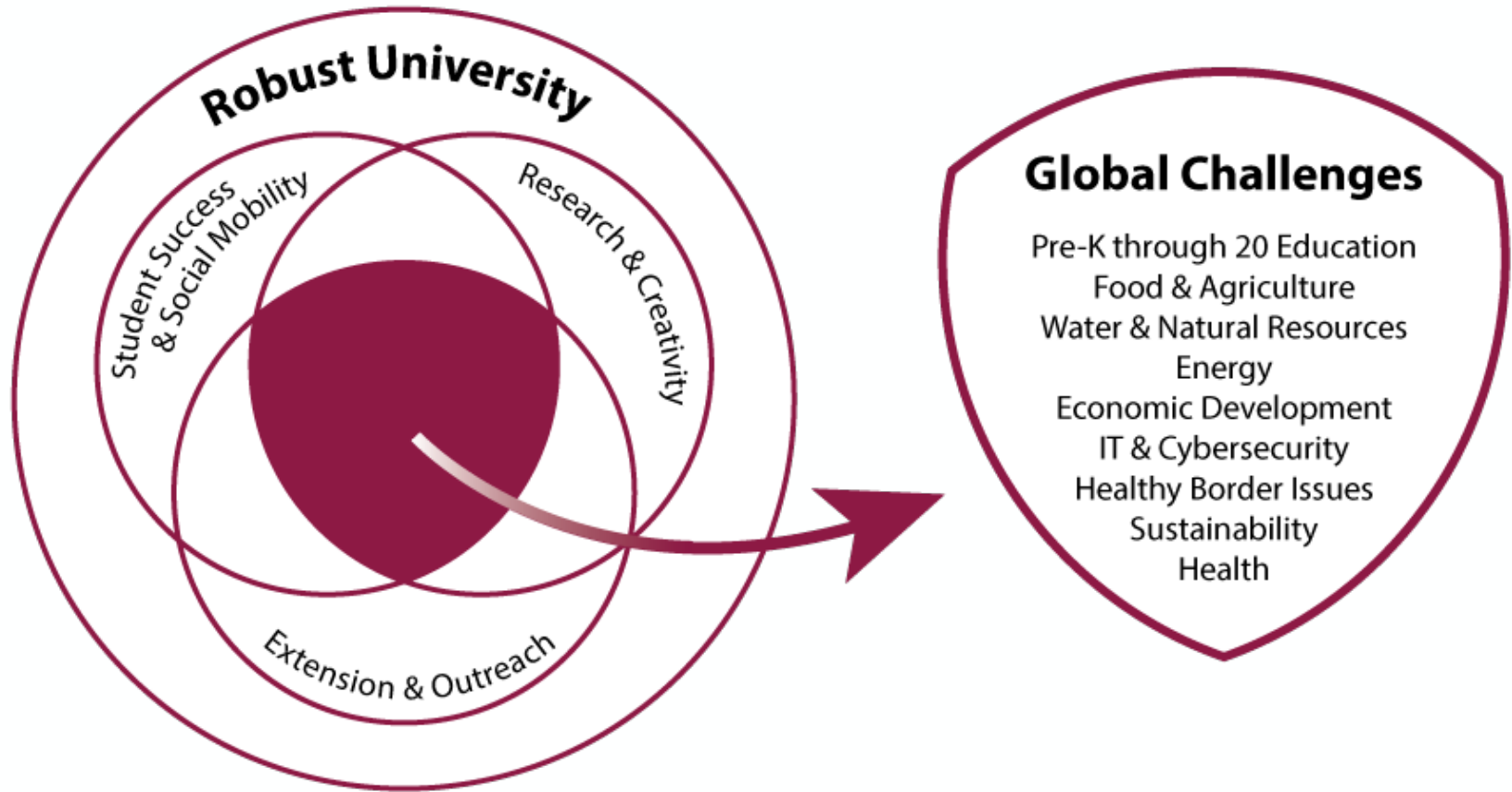


NMSU Vision

By 2025, the NMSU system will excel in **student success and social mobility** for our diverse student populations, achieve the **highest Carnegie research status (R1)**, and maintain our **Carnegie Community Engagement** classification.



NMSU LEADS 2025



What is strategic planning?

“Strategic planning is the process by which the ... members of an organization envision its future and develop the necessary procedures and operations to achieve that future.”

- J. William Pfeiffer, Leonard D. Goodstein, and Timothy Nolan of University Associates, Inc.



Benefits of strategic planning

- Increased effectiveness
- Increased efficiency
- Improved understanding and better learning
- Better decision making

John Bryson and Farnum Alston

Vision 2020 Strategic Plan Alignment – Unit Name

Planning Framework	Unit Goals, Metrics, and Timeline	Current Strategies	Major Accomplishments	Aspirations
Mission Unit Mission....	Goal 1 (to include metrics for goal and timeline for progress toward metric milestones): Vision 2020 Goal Alignment:			
Vision Unit Vision....				
Values Unit values....	Goal 2 (to include metrics for goal and timeline for progress toward metric milestones): Vision 2020 Goal Alignment:			
	Goal 3 (to include metrics for goal and timeline for progress toward metric milestones): Vision 2020 Goal Alignment:			
	Goal 4 (to include metrics for goal and timeline for progress toward metric milestones): Vision 2020 Goal Alignment:			
	Goal 5 (to include metrics for goal and timeline for progress toward metric milestones):			

EXAMPLE

SCHOOL OF NURSING STRATEGY MAP 2012-2015

Mission is what we do (our business)

Vision is who we are (what we aspire to be)

Values are our beliefs

Mission

Advance nursing science and practice through generating knowledge and preparing future leaders to address local, national and global societal needs

Vision

Pioneer improvements in health and health care through innovative nursing science, education and practice

Values

Collaboration*, Social Responsibility, Integrity*, Respect*, Accountability, Diversity*, Excellence*

Advancing Research, Education and Practice (REP)

Strengthen research infrastructure and support to advance research excellence (REP1)

Create innovative learning experiences and an environment that inspires and engages diverse students, faculty and staff (REP2)

Develop and sustain strategic relationships and collaborative partnerships (REP3)

Improve recruitment, retention, and advancement of outstanding faculty, staff and students (REP4)

Achieving Operational Excellence (O)

Evaluate and base academic programs on availability of resources (O1)

Strategically invest in SoN to advance vision (O2)

Align and support faculty and staff workload (O3)

Maximize efficiency, accuracy and transparency in teaching, operations and research (O4)

Develop operational infrastructure to support our vision (O5)

Strategic goals/objectives are HOW we will achieve our mission

Securing our Financial Future (F)

Develop a sustainable, transparent and effective financial model (F1)

Develop and implement an advancement plan to increase gifts and improve donor relations (F2)

Strategically enhance diverse funding (F3)

Strategically manage school wide resources (F4)

Creating a Sustainable Organization (S)

Develop a faculty and staff to foster innovation and creativity (S1)

Build SoN leadership & management capacity (S2)

Establish effective decision making and implementation processes (S3)

Align organizational structure and governance to position us for the future (S4)

Cultivate a supportive climate that embraces trust, collaboration, creativity and productivity (S5)

Strategic themes/categories

Values: Timely-Efficient-Flexible-Transparent-Responsive

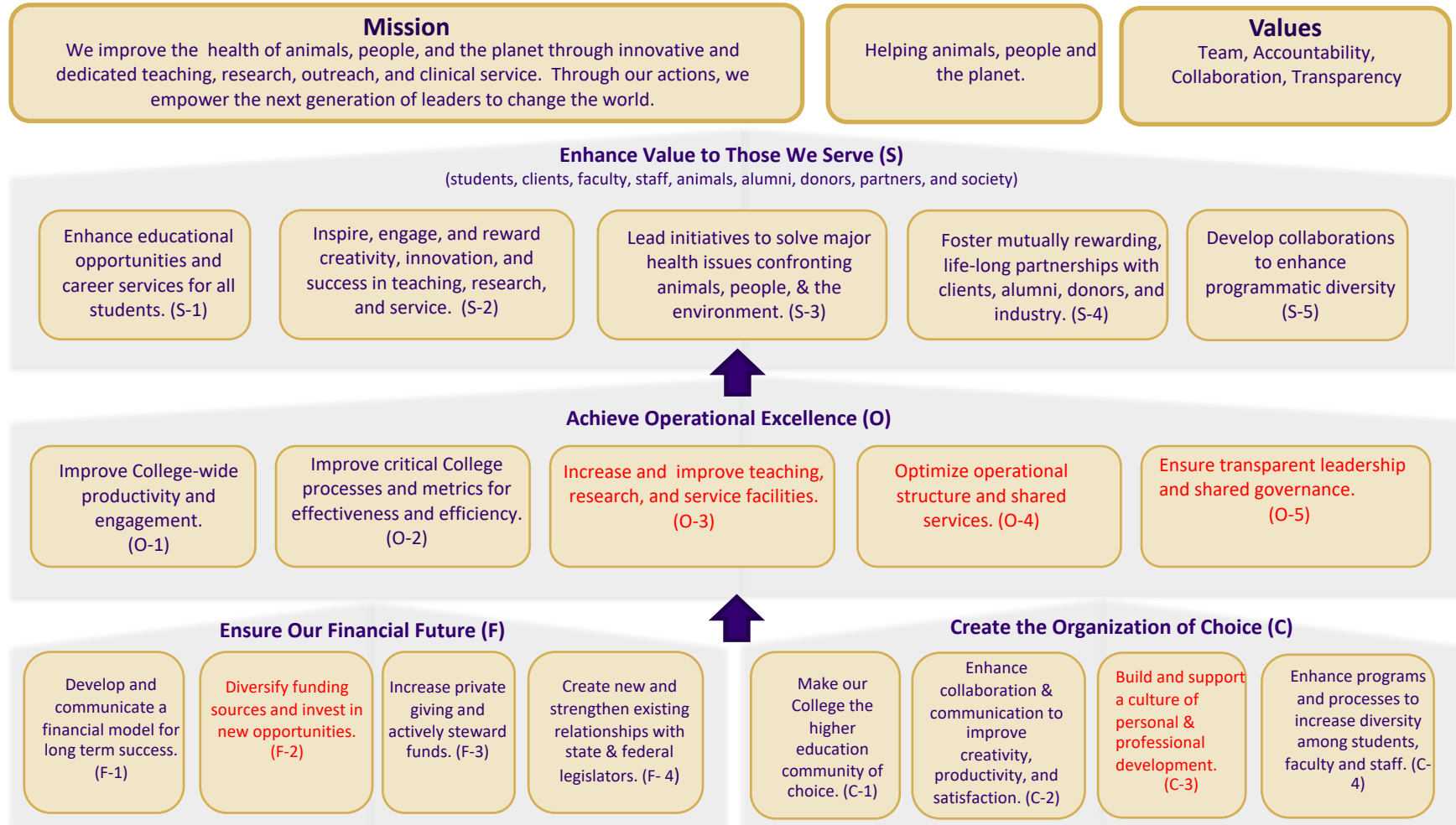
*UW Value dark purple writing= 2012 priority

Adopted August 2011

EXAMPLE

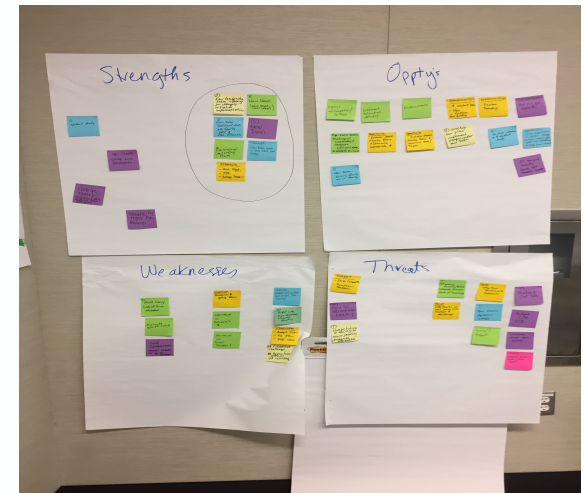
COLLEGE OF VETERINARY MEDICINE AND BIOMEDICAL SCIENCES STRATEGY MAP 2014-2017

What we choose to do within the organization
↓
Results for Those we Serve



SWOT Assessment Model

- Organizational assets, resources, people, culture, systems, partnerships, suppliers, etc.
 - Strengths
 - Weaknesses
- Marketplace, competitors, social trends, technology, regulatory environment, economic cycles
 - Opportunities
 - Threats
- Internal Assessment
- External Assessment (voice of the customer)



Strategic goals/priorities

- In what major directions will we focus our efforts to advance toward our vision? (customer, operational excellence, fiscal, organizational)
- Choose a select few, and prioritize for year 1 no more than 1 - 3

Ask:

- Do our strategic priorities support those of the greater organization?
- With whom will we link with to accomplish these goals?

Big Hairy audacious goals (BHAG)

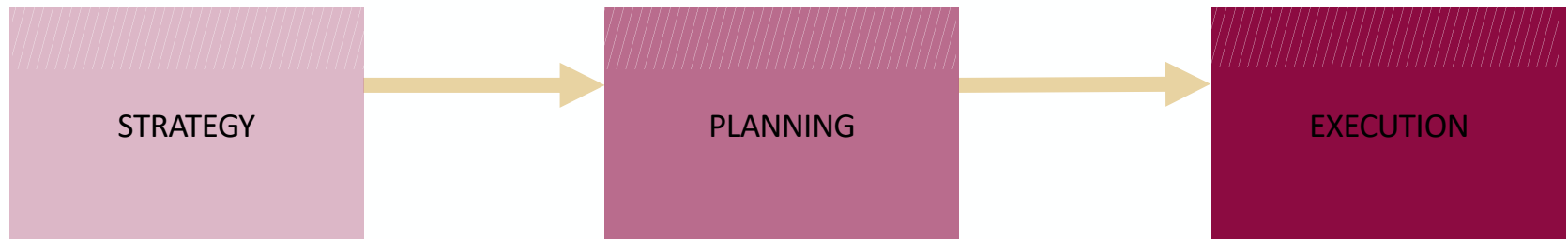
- "A true BHAG is clear and compelling, serves as unifying focal point of effort, and acts as a clear catalyst for team spirit. It has a clear finish line, so the organization can know when it has achieved the goal; people like to shoot for finish lines."

— Collins and Porras, *Built to Last: Successful Habits of Visionary Companies*

- Think: MLK's *I have a dream* or JFK's *Why we go to the moon*

Continuum

Each of these components needs the other two in order to make an impact in an organization



Leadership considerations

- Who should be involved with the effort?
- Who else outside the organization should I talk to?
- What changes are occurring in your organization, in the state, nation or globe that might influence your plan?
- How will you communicate about the planning effort and final plan?
- What is your role as coordinator of the effort: a visionary, a doer, a meeting leader, a member, etc.?

Background / Problem Statement

Not everyone feels equal, included, or engaged within the NMSU system. Some feel a lack of support (could be a lack of financial support) for programming and activities.

Purpose of the Activity

Make diversity, inclusion, and engagement a priority instead of an afterthought.

Specific Goals / Objectives/Actions**Objectives**

1. Ensure the inclusion of branch campuses.
2. Diversity programs need to receive adequate support: Analyze and create a report on the total amount of financial support being invested across NMSU in Diversity programs right now (baseline)-- see if these resources could be better leveraged.
3. Students should feel like they belong in college, and not feel hindered from participating in the campus due to a lack of resources.
4. Staff and faculty need to feel appreciated, and their passion in their field should be encouraged.
5. Empower the individual to use their voice to implement change and advancement within their own unit.
 - a. Create a communication forum/town hall to create an opportunity for staff, faculty, and students to speak up about issues, and also help solve solutions.

Timeline

(1) by January 1st, 2020, there should be effective lines of communication between diversity councils at each branch; (2) report should be finished by January 1st, 2020; (3) student participation in campus activities should go up by next Fall; (4) Faculty & Staff should have more positive satisfaction surveys by Spring of 2020; (5) Have at least three town halls this Spring semester, and possibly one this current Fall semester.

Strategic Alignment with Goal X and Action #

(1) Goal 4.5 , (2) Goal 4.1, (3) Goal 4.1, (4) Goal 4.2, (5) Goals 4.1 & 4.2

Metrics to be Used: baseline, progress, outcomes

(1) use current collaboration between branch campuses regarding diversity & inclusion as the baseline; (2) use the correct amount of financial support being given to diversity programs right now as the baseline; (3) use a compiled list of student resources as the baseline; (4) use a comprehensive faculty & staff satisfaction survey as the baseline; (5) compile a list of student organizations that advocate for change on a campus, city, state, national, or international level and use it as the baseline

Sponsor / Owner

Team 4

Project Leader / Champion

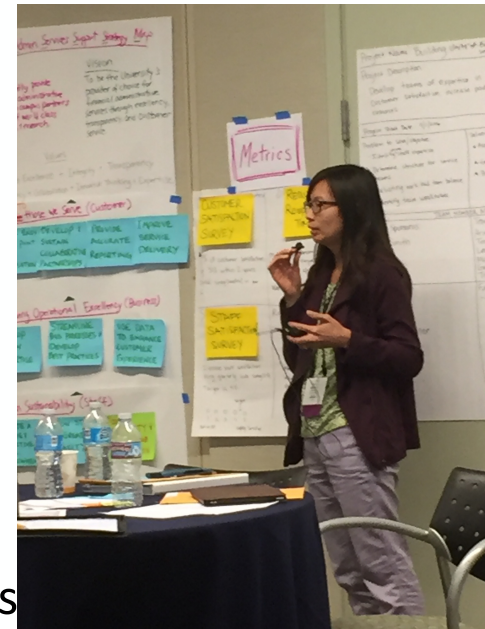
(1) Diversity Council or Office of Diversity & Inclusion once it is established; (2) Continuing Diversity Board, Diversity Council; (3) Vice President of Student Success?, Dean of Students; (4) Deans of each college , (5) Dean of Students?, Provost, President?

Facilitator (if one is needed)**Team Members – be broad, system wide**

(1) Diversity Council or Office of Diversity & Inclusion once it is established, and the mirroring entities in all the branches of NMSU; (2) Continuing Diversity Board, all diversity programs, Diversity Council, and the different entities that contribute to funding the Diversity Programs, (3) ASNMSU, Residence Hall Association, AWO, other student orgs; Res (4) the Deans of each college, department heads, etc.; (5) all entities on campus and in branch campuses

Lessons learned about implementation

1. Always have a designated responsible party
2. Reward the “doers”
3. Provide support to be “accountable”
4. Be tolerant of failure
5. Clarify decision rules
6. Small wins matter
7. Don’t micromanage
8. Get people involved in creating their own goals
9. Middle management is key to implementation
10. Focus on results, not activity



Pat Sanaghan, Academic Impression,
December 2014

Success factors: strategic planning implementation

1. Embrace it
2. Take initiative and try different things/take risks
3. Follow through/make things happen
4. Be persistent
5. Be patient
6. Reflect/adapt/be flexible
7. Try to find some humor
8. Involve the right people/build teams
9. Communicate, communicate, communicate
10. Measure processes
11. Build allies
12. Focus on customer needs
13. Focus on process improvement
14. Choose your battles
15. Treat yourself well

- Ruth Johnston, Ph.D.



Strategic planning summary

- Is future focused
 - Is leadership driven
 - Provides for a high level of organizational involvement
 - Allows contention within the broad framework of the organization's goals
 - Creates broad objectives that encompass organization purpose and culture
 - Produces a plan that is widely understood and accepted
 - Produces a plan that is both comprehensive and detailed
- Is a model that can be rigorously applied
 - Provides the energizing force to drive the needed changes
 - Will enable an organization to create and achieve its ideal future
 - Allows dialog to take place in a continuous and interactive manner
 - Is measurable

Strategic planning resources

- Academic strategy: the management revolution in American higher education, George Keller, 1983
- Applied Strategic Planning: An Introduction, Goodstein, Nolan and Pfeiffer, 1992
- Crafting Strategy, Henry Mintzberg & Harvard Business Review, No. 87407
- The Strategic Plan is Dead. Long Live Strategy. O'Donovan and Flower, Stanford Social Innovation, January 2013
- Creating Your Strategic Plan, A workbook for public and non-profit organizations, John Bryson and Farnum Alston, Wiley and Sons, 2011
- 10 Critical Lessons I've Learned about Implementing a Strategic Plan, Sanaghan, Academic Impressions, December 2014
- Stress-Test Your Strategy: The 7 Questions to Ask., Robert L. Simons, Harvard Business Review, November 2010
- Tips for Effective Strategic Planning, Christine D. Keen, HR Magazine, August 1994



ORGANIZATION NAME: _____

STRATEGY MAP FOR 2020 - 2025

Mission	Vision	Values
Focus on Who We Serve (students, faculty, staff, public)		
Improving Internal Business Practices		Build Organizational Capacity
Securing Resources (Funding, Time, Space, Etc.)		



BE BOLD. Shape the Future.

Action Plan

Name:

Date:

Background / Problem Statement

Mission of the Activity

Specific Goals / Objectives

Objectives:

Timeline

Strategic Alignment

Measures to be Used: baseline, progress, outcomes

Sponsor / Owner

Project Leader / Manager

Facilitator (if one is needed)

Team Members



BE BOLD. Shape the Future.

NMSU LEADS 2025



BE BOLD. Shape the Future.

Questions and Thank you



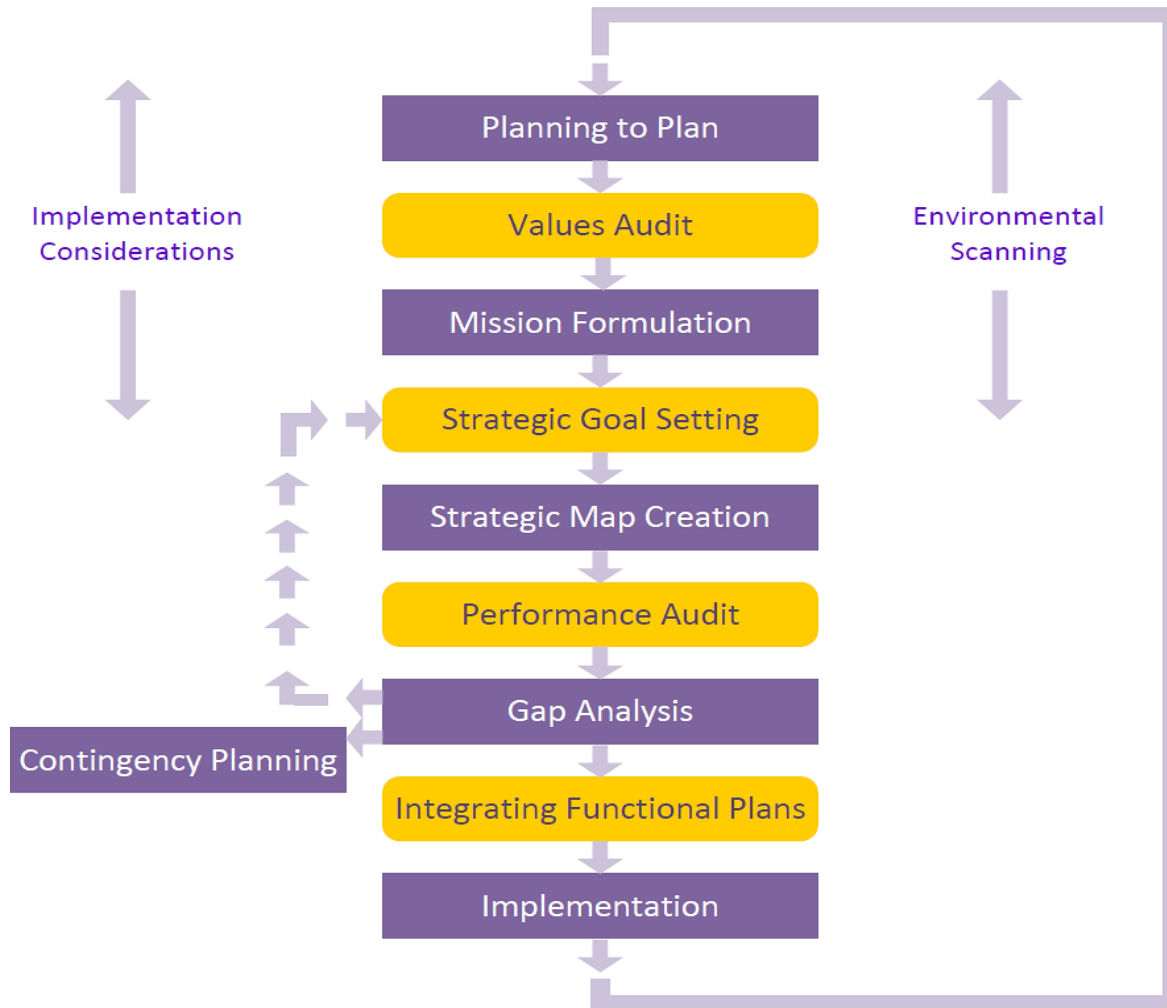
BE BOLD. Shape the Future.

10 Principles for Planning and Execution

1. Aim High
2. Build on Your Strengths
3. Be Ambidextrous
4. Clarify Everyone's Strategic Role
5. Align Structures to Strategy
6. Transcend Functional Barriers
7. Become Fully Digital
8. Keep It Simple, Sometimes
9. Shape Your Value Chain –
engage your partners
10. Cultivate Collective Mastery



Strategic planning model



Strategy is about

Strategy



**Those We
Serve**

Change

Leverage

Focus

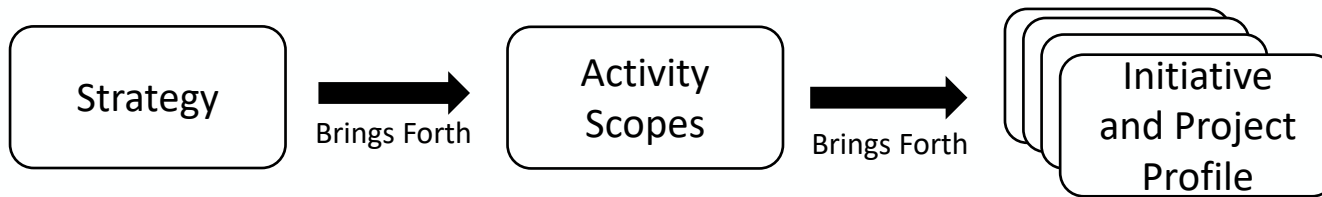
**Choices-
what we choose to do**

**Position-
relative to others**

**Capabilities-
differentiation**

Mission, Vision, Values & Goals

Planning to implementation flow



College of Veterinary Medicine and Biomedical Sciences
Strategy Map 2014-2017

Mission
We improve the health of animals, people, and the planet through innovative and individual teaching, research, outreach, and clinical services. Through our actions, we empower the next generation of leaders to change the world.

Vision/Tag Line
Leading animals, people, and the planet.

Values
Team, Accountability, Collaboration, Transparency

Enhance Value to Stake We Serve (S)
(Students, Clients, Faculty, Staff, Animals, Alumni, Donors, Partners, and Society)

Enhance Educational Opportunities and Career Services for All Students (S-1)
Provide educational opportunities and career services for all students (S-1)

Improve teaching, research, and service facilities (S-2)
Improve teaching, research, and service facilities (S-2)

Improve operational efficiency and shared services (S-3)
Improve operational efficiency and shared services (S-3)

Improve leadership and shared governance (S-4)
Improve leadership and shared governance (S-4)

Improve funding sources and invest in new opportunities (S-5)
Improve funding sources and invest in new opportunities (S-5)

Build and support a culture of personal and professional development (S-6)
Build and support a culture of personal and professional development (S-6)

2012 Priorities will be to:

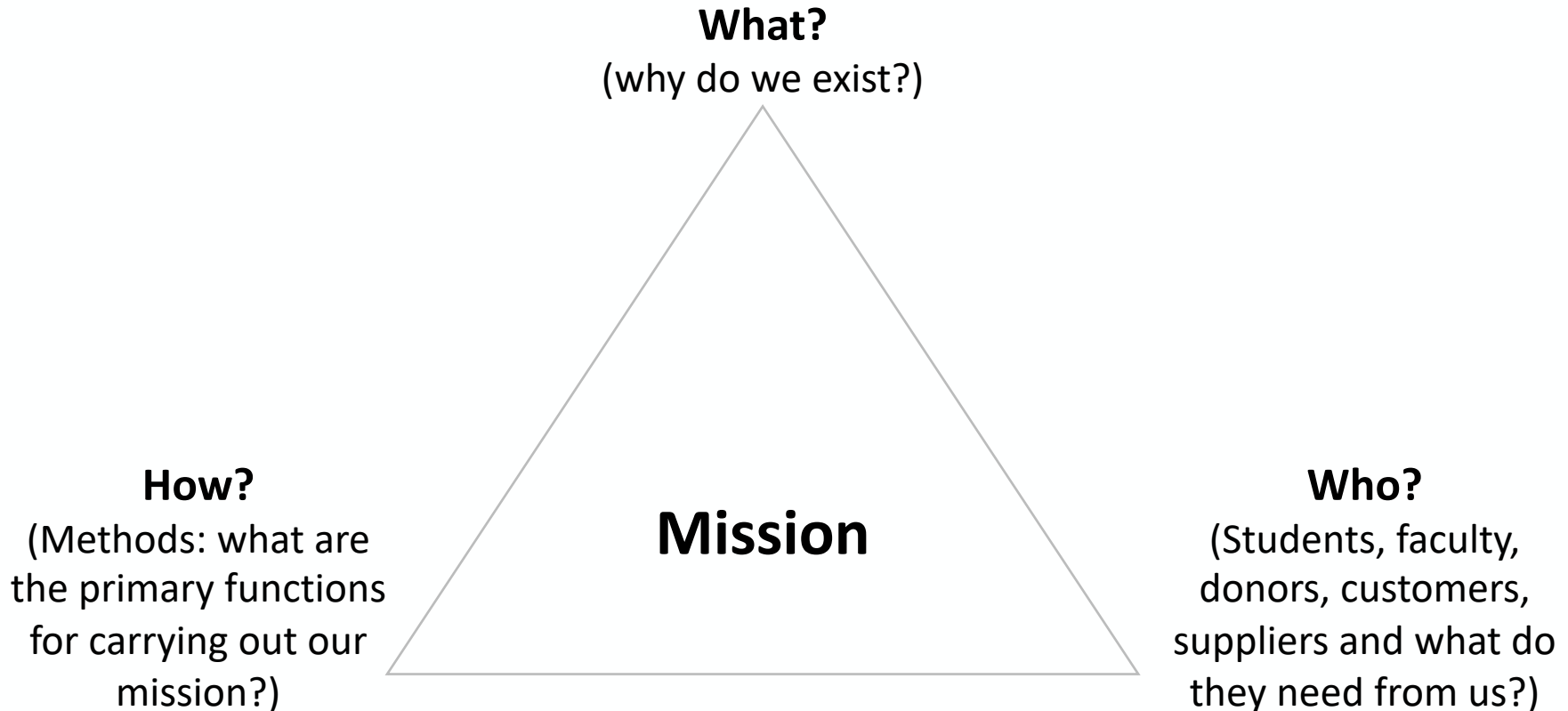
Personal & Professional Development - Activity Scope Date: January 29, 2014

Background / Problem Statement
There is a need for a personal and professional development program leading to both of the following: 1. A set of skills and knowledge to support the role of the future leader. 2. A set of skills and knowledge to support the role of the future leader.

Mission of the Activity
In order to achieve mission, vision and values develop and institutionalize a set of activities and processes to enhance future leadership planning, succession, employee alignment, and engagement.

Specific Goals / Objectives
1. Establish a meaningful evaluation process.
2. Identify competency profiles for all FTEs.
3. Develop a process to identify and develop leaders to do and the specific system requirements, now and into the future.
4. Deliver required competencies to get all employees oriented to the College in a personal leadership skills, values, cultural orientation (S-1, S-2, S-3, S-4, S-5, S-6, S-7, S-8, S-9, S-10, S-11, S-12, S-13, S-14, S-15, S-16, S-17, S-18, S-19, S-20, S-21, S-22, S-23, S-24, S-25, S-26, S-27, S-28, S-29, S-30, S-31, S-32, S-33, S-34, S-35, S-36, S-37, S-38, S-39, S-40, S-41, S-42, S-43, S-44, S-45, S-46, S-47, S-48, S-49, S-50, S-51, S-52, S-53, S-54, S-55, S-56, S-57, S-58, S-59, S-60, S-61, S-62, S-63, S-64, S-65, S-66, S-67, S-68, S-69, S-70, S-71, S-72, S-73, S-74, S-75, S-76, S-77, S-78, S-79, S-80, S-81, S-82, S-83, S-84, S-85, S-86, S-87, S-88, S-89, S-90, S-91, S-92, S-93, S-94, S-95, S-96, S-97, S-98, S-99, S-100, S-101, S-102, S-103, S-104, S-105, S-106, S-107, S-108, S-109, S-110, S-111, S-112, S-113, S-114, S-115, S-116, S-117, S-118, S-119, S-120, S-121, S-122, S-123, S-124, S-125, S-126, S-127, S-128, S-129, S-130, S-131, S-132, S-133, S-134, S-135, S-136, S-137, S-138, S-139, S-140, S-141, S-142, S-143, S-144, S-145, S-146, S-147, S-148, S-149, S-150, S-151, S-152, S-153, S-154, S-155, S-156, S-157, S-158, S-159, S-160, S-161, S-162, S-163, S-164, S-165, S-166, S-167, S-168, S-169, S-170, S-171, S-172, S-173, S-174, S-175, S-176, S-177, S-178, S-179, S-180, S-181, S-182, S-183, S-184, S-185, S-186, S-187, S-188, S-189, S-190, S-191, S-192, S-193, S-194, S-195, S-196, S-197, S-198, S-199, S-200, S-201, S-202, S-203, S-204, S-205, S-206, S-207, S-208, S-209, S-210, S-211, S-212, S-213, S-214, S-215, S-216, S-217, S-218, S-219, S-220, S-221, S-222, S-223, S-224, S-225, S-226, S-227, S-228, S-229, S-230, S-231, S-232, S-233, S-234, S-235, S-236, S-237, S-238, S-239, S-240, S-241, S-242, S-243, S-244, S-245, S-246, S-247, S-248, S-249, S-250, S-251, S-252, S-253, S-254, S-255, S-256, S-257, S-258, S-259, S-260, S-261, S-262, S-263, S-264, S-265, S-266, S-267, S-268, S-269, S-270, S-271, S-272, S-273, S-274, S-275, S-276, S-277, S-278, S-279, S-280, S-281, S-282, S-283, S-284, S-285, S-286, S-287, S-288, S-289, S-290, S-291, S-292, S-293, S-294, S-295, S-296, S-297, S-298, S-299, S-300, S-301, S-302, S-303, S-304, S-305, S-306, S-307, S-308, S-309, S-310, S-311, S-312, S-313, S-314, S-315, S-316, S-317, S-318, S-319, S-320, S-321, S-322, S-323, S-324, S-325, S-326, S-327, S-328, S-329, S-330, S-331, S-332, S-333, S-334, S-335, S-336, S-337, S-338, S-339, S-340, S-341, S-342, S-343, S-344, S-345, S-346, S-347, S-348, S-349, S-350, S-351, S-352, S-353, S-354, S-355, S-356, S-357, S-358, S-359, S-360, S-361, S-362, S-363, S-364, S-365, S-366, S-367, S-368, S-369, S-370, S-371, S-372, S-373, S-374, S-375, S-376, S-377, S-378, S-379, S-380, S-381, S-382, S-383, S-384, S-385, S-386, S-387, S-388, S-389, S-390, S-391, S-392, S-393, S-394, S-395, S-396, S-397, S-398, S-399, S-400, S-401, S-402, S-403, S-404, S-405, S-406, S-407, S-408, S-409, S-410, S-411, S-412, S-413, S-414, S-415, S-416, S-417, S-418, S-419, S-420, S-421, S-422, S-423, S-424, S-425, S-426, S-427, S-428, S-429, S-430, S-431, S-432, S-433, S-434, S-435, S-436, S-437, S-438, S-439, S-440, S-441, S-442, S-443, S-444, S-445, S-446, S-447, S-448, S-449, S-450, S-451, S-452, S-453, S-454, S-455, S-456, S-457, S-458, S-459, S-460, S-461, S-462, S-463, S-464, S-465, S-466, S-467, S-468, S-469, S-470, S-471, S-472, S-473, S-474, S-475, S-476, S-477, S-478, S-479, S-480, S-481, S-482, S-483, S-484, S-485, S-486, S-487, S-488, S-489, S-490, S-491, S-492, S-493, S-494, S-495, S-496, S-497, S-498, S-499, S-500, S-501, S-502, S-503, S-504, S-505, S-506, S-507, S-508, S-509, S-510, S-511, S-512, S-513, S-514, S-515, S-516, S-517, S-518, S-519, S-520, S-521, S-522, S-523, S-524, S-525, S-526, S-527, S-528, S-529, S-530, S-531, S-532, S-533, S-534, S-535, S-536, S-537, S-538, S-539, S-540, S-541, S-542, S-543, S-544, S-545, S-546, S-547, S-548, S-549, S-550, S-551, S-552, S-553, S-554, S-555, S-556, S-557, S-558, S-559, S-560, S-561, S-562, S-563, S-564, S-565, S-566, S-567, S-568, S-569, S-570, S-571, S-572, S-573, S-574, S-575, S-576, S-577, S-578, S-579, S-580, S-581, S-582, S-583, S-584, S-585, S-586, S-587, S-588, S-589, S-590, S-591, S-592, S-593, S-594, S-595, S-596, S-597, S-598, S-599, S-600, S-601, S-602, S-603, S-604, S-605, S-606, S-607, S-608, S-609, S-610, S-611, S-612, S-613, S-614, S-615, S-616, S-617, S-618, S-619, S-620, S-621, S-622, S-623, S-624, S-625, S-626, S-627, S-628, S-629, S-630, S-631, S-632, S-633, S-634, S-635, S-636, S-637, S-638, S-639, S-640, S-641, S-642, S-643, S-644, S-645, S-646, S-647, S-648, S-649, S-650, S-651, S-652, S-653, S-654, S-655, S-656, S-657, S-658, S-659, S-660, S-661, S-662, S-663, S-664, S-665, S-666, S-667, S-668, S-669, S-670, S-671, S-672, S-673, S-674, S-675, S-676, S-677, S-678, S-679, S-680, S-681, S-682, S-683, S-684, S-685, S-686, S-687, S-688, S-689, S-690, S-691, S-692, S-693, S-694, S-695, S-696, S-697, S-698, S-699, S-700, S-701, S-702, S-703, S-704, S-705, S-706, S-707, S-708, S-709, S-710, S-711, S-712, S-713, S-714, S-715, S-716, S-717, S-718, S-719, S-720, S-721, S-722, S-723, S-724, S-725, S-726, S-727, S-728, S-729, S-730, S-731, S-732, S-733, S-734, S-735, S-736, S-737, S-738, S-739, S-740, S-741, S-742, S-743, S-744, S-745, S-746, S-747, S-748, S-749, S-750, S-751, S-752, S-753, S-754, S-755, S-756, S-757, S-758, S-759, S-760, S-761, S-762, S-763, S-764, S-765, S-766, S-767, S-768, S-769, S-770, S-771, S-772, S-773, S-774, S-775, S-776, S-777, S-778, S-779, S-780, S-781, S-782, S-783, S-784, S-785, S-786, S-787, S-788, S-789, S-790, S-791, S-792, S-793, S-794, S-795, S-796, S-797, S-798, S-799, S-800, S-801, S-802, S-803, S-804, S-805, S-806, S-807, S-808, S-809, S-810, S-811, S-812, S-813, S-814, S-815, S-816, S-817, S-818, S-819, S-820, S-821, S-822, S-823, S-824, S-825, S-826, S-827, S-828, S-829, S-830, S-831, S-832, S-833, S-834, S-835, S-836, S-837, S-838, S-839, S-840, S-841, S-842, S-843, S-844, S-845, S-846, S-847, S-848, S-849, S-850, S-851, S-852, S-853, S-854, S-855, S-856, S-857, S-858, S-859, S-860, S-861, S-862, S-863, S-864, S-865, S-866, S-867, S-868, S-869, S-870, S-871, S-872, S-873, S-874, S-875, S-876, S-877, S-878, S-879, S-880, S-881, S-882, S-883, S-884, S-885, S-886, S-887, S-888, S-889, S-890, S-891, S-892, S-893, S-894, S-895, S-896, S-897, S-898, S-899, S-900, S-901, S-902, S-903, S-904, S-905, S-906, S-907, S-908, S-909, S-910, S-911, S-912, S-913, S-914, S-915, S-916, S-917, S-918, S-919, S-920, S-921, S-922, S-923, S-924, S-925, S-926, S-927, S-928, S-929, S-930, S-931, S-932, S-933, S-934, S-935, S-936, S-937, S-938, S-939, S-940, S-941, S-942, S-943, S-944, S-945, S-946, S-947, S-948, S-949, S-950, S-951, S-952, S-953, S-954, S-955, S-956, S-957, S-958, S-959, S-960, S-961, S-962, S-963, S-964, S-965, S-966, S-967, S-968, S-969, S-970, S-971, S-972, S-973, S-974, S-975, S-976, S-977, S-978, S-979, S-980, S-981, S-982, S-983, S-984, S-985, S-986, S-987, S-988, S-989, S-990, S-991, S-992, S-993, S-994, S-995, S-996, S-997, S-998, S-999, S-1000, S-1001, S-1002, S-1003, S-1004, S-1005, S-1006, S-1007, S-1008, S-1009, S-1010, S-1011, S-1012, S-1013, S-1014, S-1015, S-1016, S-1017, S-1018, S-1019, S-1020, S-1021, S-1022, S-1023, S-1024, S-1025, S-1026, S-1027, S-1028, S-1029, S-1030, S-1031, S-1032, S-1033, S-1034, S-1035, S-1036, S-1037, S-1038, S-1039, S-1040, S-1041, S-1042, S-1043, S-1044, S-1045, S-1046, S-1047, S-1048, S-1049, S-1050, S-1051, S-1052, S-1053, S-1054, S-1055, S-1056, S-1057, S-1058, S-1059, S-1060, S-1061, S-1062, S-1063, S-1064, S-1065, S-1066, S-1067, S-1068, S-1069, S-1070, S-1071, S-1072, S-1073, S-1074, S-1075, S-1076, S-1077, S-1078, S-1079, S-1080, S-1081, S-1082, S-1083, S-1084, S-1085, S-1086, S-1087, S-1088, S-1089, S-1090, S-1091, S-1092, S-1093, S-1094, S-1095, S-1096, S-1097, S-1098, S-1099, S-1100, S-1101, S-1102, S-1103, S-1104, S-1105, S-1106, S-1107, S-1108, S-1109, S-1110, S-1111, S-1112, S-1113, S-1114, S-1115, S-1116, S-1117, S-1118, S-1119, S-1120, S-1121, S-1122, S-1123, S-1124, S-1125, S-1126, S-1127, S-1128, S-1129, S-1130, S-1131, S-1132, S-1133, S-1134, S-1135, S-1136, S-1137, S-1138, S-1139, S-1140, S-1141, S-1142, S-1143, S-1144, S-1145, S-1146, S-1147, S-1148, S-1149, S-1150, S-1151, S-1152, S-1153, S-1154, S-1155, S-1156, S-1157, S-1158, S-1159, S-1160, S-1161, S-1162, S-1163, S-1164, S-1165, S-1166, S-1167, S-1168, S-1169, S-1170, S-1171, S-1172, S-1173, S-1174, S-1175, S-1176, S-1177, S-1178, S-1179, S-1180, S-1181, S-1182, S-1183, S-1184, S-1185, S-1186, S-1187, S-1188, S-1189, S-1190, S-1191, S-1192, S-1193, S-1194, S-1195, S-1196, S-1197, S-1198, S-1199, S-1200, S-1201, S-1202, S-1203, S-1204, S-1205, S-1206, S-1207, S-1208, S-1209, S-1210, S-1211, S-1212, S-1213, S-1214, S-1215, S-1216, S-1217, S-1218, S-1219, S-1220, S-1221, S-1222, S-1223, S-1224, S-1225, S-1226, S-1227, S-1228, S-1229, S-1230, S-1231, S-1232, S-1233, S-1234, S-1235, S-1236, S-1237, S-1238, S-1239, S-1240, S-1241, S-1242, S-1243, S-1244, S-1245, S-1246, S-1247, S-1248, S-1249, S-1250, S-1251, S-1252, S-1253, S-1254, S-1255, S-1256, S-1257, S-1258, S-1259, S-1260, S-1261, S-1262, S-1263, S-1264, S-1265, S-1266, S-1267, S-1268, S-1269, S-1270, S-1271, S-1272, S-1273, S-1274, S-1275, S-1276, S-1277, S-1278, S-1279, S-1280, S-1281, S-1282, S-1283, S-1284, S-1285, S-1286, S-1287, S-1288, S-1289, S-1290, S-1291, S-1292, S-1293, S-1294, S-1295, S-1296, S-1297, S-1298, S-1299, S-1300, S-1301, S-1302, S-1303, S-1304, S-1305, S-1306, S-1307, S-1308, S-1309, S-1310, S-1311, S-1312, S-1313, S-1314, S-1315, S-1316, S-1317, S-1318, S-1319, S-1320, S-1321, S-1322, S-1323, S-1324, S-1325, S-1326, S-1327, S-1328, S-1329, S-1330, S-1331, S-1332, S-1333, S-1334, S-1335, S-1336, S-1337, S-1338, S-1339, S-1340, S-1341, S-1342, S-1343, S-1344, S-1345, S-1346, S-1347, S-1348, S-1349, S-1350, S-1351, S-1352, S-1353, S-1354, S-1355, S-1356, S-1357, S-1358, S-1359, S-1360, S-1361, S-1362, S-1363, S-1364, S-1365, S-1366, S-1367, S-1368, S-1369, S-1370, S-1371, S-1372, S-1373, S-1374, S-1375, S-1376, S-1377, S-1378, S-1379, S-1380, S-1381, S-1382, S-1383, S-1384, S-1385, S-1386, S-1387, S-1388, S-1389, S-1390, S-1391, S-1392, S-1393, S-1394, S-1395, S-1396, S-1397, S-1398, S-1399, S-1400, S-1401, S-1402, S-1403, S-1404, S-1405, S-1406, S-1407, S-1408, S-1409, S-1410, S-1411, S-1412, S-1413, S-1414, S-1415, S-1416, S-1417, S-1418, S-1419, S-1420, S-1421, S-1422, S-1423, S-1424, S-1425, S-1426, S-1427, S-1428, S-1429, S-1430, S-1431, S-1432, S-1433, S-1434, S-1435, S-1436, S-1437, S-1438, S-1439, S-1440, S-1441, S-1442, S-1443, S-1444, S-1445, S-1446, S-1447, S-1448, S-1449, S-1450, S-1451, S-1452, S-1453, S-1454, S-1455, S-1456, S-1457, S-1458, S-1459, S-1460, S-1461, S-1462, S-1463, S-1464, S-1465, S-1466, S-1467, S-1468, S-1469, S-1470, S-1471, S-1472, S-1473, S-1474, S-1475, S-1476, S-1477, S-1478, S-1479, S-1480, S-1481, S-1482, S-1483, S-1484, S-1485, S-1486, S-1487, S-1488, S-1489, S-1490, S-1491, S-1492, S-1493, S-1494, S-1495, S-1496, S-1497, S-1498, S-1499, S-1500, S-1501, S-1502, S-1503, S-1504, S-1505, S-1506, S-1507, S-1508, S-1509, S-1510, S-1511, S-1512, S-1513, S-1514, S-1515, S-1516, S-1517, S-1518, S-1519, S-1520, S-1521, S-1522, S-1523, S-1524, S-1525, S-1526, S-1527, S-1528, S-1529, S-1530, S-1531, S-1532, S-1533, S-1534, S-1535, S-1536, S-1537, S-1538, S-1539, S-1540, S-1541, S-1542, S-1543, S-1544, S-1545, S-1546, S-1547, S-1548, S-1549, S-1550, S-1551, S-1552, S-1553, S-1554, S-1555, S-1556, S-1557, S-1558, S-1559, S-1560, S-1561, S-1562, S-1563, S-1564, S-1565, S-1566, S-1567, S-1568, S-1569, S-1570, S-1571, S-1572, S-1573, S-1574, S-1575, S-1576, S-1577, S-1578, S-1579, S-1580, S-1581, S-1582, S-1583, S-1584, S-1585, S-1586, S-1587, S-1588, S-1589, S-1590, S-1591, S-1592, S-1593, S-1594, S-1595, S-1596, S-1597, S-1598, S-1599, S-1600, S-1601, S-1602, S-1603, S-1604, S-1605, S-1606, S-1607, S-1608, S-1609, S-1610, S-1611, S-1612, S-1613, S-1614, S-1615, S-1616, S-1617, S-1618, S-1619, S-1620, S-1621, S-1622, S-1623, S-1624, S-1625, S-1626, S-1627, S-1628, S-1629, S-1630, S-1631, S-1632, S-1633, S-1634, S-1635, S-1636, S-1637, S-1638, S-1639, S-1640, S-1641, S-1642, S-1643, S-1644, S-1645, S-1646, S-1647, S-1648, S-1649, S-1650, S-1651, S-1652, S-1653, S-1654, S-1655, S-1656, S-1657, S-1658, S-1659, S-1660, S-1661, S-1662, S-1663, S-1664, S-1665, S-1666, S-1667, S-1668, S-1669, S-1670, S-1671, S-1672, S-1673, S-1674, S-1675, S-1676, S-1677, S-1678, S-1679, S-1680, S-1681, S-1682, S-1683, S-1684, S-1685, S-1686, S-1687, S-1688, S-1689, S-1690, S-1691, S-1692, S-1693, S-1694, S-1695, S-1696, S-1697, S-1698, S-1699, S-1700, S-1701, S-1702, S-1703, S-1704, S-1705, S-1706, S-1707, S-1708, S-1709, S-1710, S-1711, S-1712, S-1713, S-1714, S-1715, S-1716, S-1717, S-1718, S-1719, S-1720, S-1721, S-1722, S-1723, S-1724, S-1725, S-1726, S-1727, S-1728, S-1729, S-1730, S-1731, S-1732, S-1733, S-1734, S-1735, S-1736, S-1737, S-1738, S-1739, S-1740, S-1741, S-1742, S-1743, S-1744, S-1745, S-1746, S-1747, S-1748, S-1749, S-1750, S-1751, S-1752, S-1753, S-1754, S-1755, S-1756, S-1757, S-1758, S-1759, S-1760, S-1761, S-1762, S-1763, S-1764, S-1765, S-1766, S-1767, S-1768, S-1769, S-1770, S-1771, S-1772, S-1773, S-1774, S-1775, S-1776, S-1777, S-1778, S-1779, S-1780, S-1781, S-1782, S-1783, S-1784, S-1785, S-1786, S-1787, S-1788, S-1789, S-1790, S-1791, S-1792, S-1793, S-1794, S-1795, S-1796, S-1797, S-1798, S-1799, S-1800, S-1801, S-1802, S-1803,

Mission building



Visioning

- Where do we want to be in 3+ years?
 - What will be our stakeholder needs?
-
- This is an aspirational statement – something to work toward.
 - Some groups have only one statement that includes mission, vision, and values.



Values

- What are our organizational beliefs and principles?
- This often begins with discussion of personal values – what do individuals want to be known for, internally and externally. Then a shift to organizational values; with agreement to begin practicing and using them to help change the culture if the values are new to the organization.

ORGANIZATION NAME: _____

STRATEGY MAP FOR 2020 - 2025

Mission	Vision	Values
Focus on Who We Serve (students, faculty, staff, public)		
Improving Internal Business Practices		Build Organizational Capacity
Securing Resources (Funding, Time, Space, Etc.)		



BE BOLD. Shape the Future.

SWOT Assessment Model

- Strengths
 - Those things that you do well, the high value or performance points
 - Strengths can be tangible: loyal customers, efficient distribution channels, very high quality products, excellent financial condition
 - Strengths can be intangible: good leadership, strategic insights, customer intelligence, solid reputation, highly skilled workforce
 - Often considered “Core Competencies” – best leverage points for growth without draining your resources
- Opportunities
 - Potential areas for growth and higher performance
 - External: marketplace, unhappy customers using your competitors, better economic conditions, alternative funding sources
 - Internal: classified as strengths
 - Timing may be important for capitalizing on opportunities

SWOT Assessment Model

- Weaknesses
 - Those things that prevent you from doing what you really need to do
 - Since weaknesses are internal, they are within your control
 - Weaknesses include: bad leadership, unskilled workforce, insufficient resources, poor product quality, slow distribution and delivery channels, outdated technologies, lack of planning...
- Threats
 - Challenges confronting the organization, external in nature
 - Threats can be wide ranging – bad press coverage, shifts in consumer behavior, substitute products, new regulations...
 - It may be useful to classify or assign probabilities to threats
 - The more accurate you are identifying threats, the better position you are for dealing with the “sudden ripples” of change

Glossary of terms

- **Strategy Map** — one page visual representation of the mission, vision, values, strategic themes, and strategies. Normally a 3-5 year period. The map is dynamic and should illustrate how these goals in relation to each other will help achieve the mission, vision and values.
- **Mission** — the purpose of the organization (doesn't usually change).
- **Vision** — what the organization hopes to achieve (changes over time as vision is realized).
- **Value** — core beliefs of the organization, e.g. teamwork. A small set of 5-7 values people demonstrate in how they work. Some values may be those the organization wants to achieve and will work toward.
- **Strategic Theme** — a description of a set of strategies, e.g. customer focused, internal processes, assets, organizational capacity. See Balanced Scorecard Strategy slide on prior page. The themes can be named what makes sense to the organization.
- **Strategic Goals/Objectives** — future focused activity that will help drive the organization in meeting its mission and vision.
- **Actions/Initiatives** — not on the strategy map, but are activities or initiatives the organization will take in order to achieve the strategic goal. Often to-dos.
- **Activity Scope** — a one page visual (included later) that can be used to map out the actions needed to achieve a goal. Includes problem statement, activity's mission, objectives/set of to-do's, timeline, alignment with strategy, roles (sponsor, leader, facilitator, team members).