

Strategic Planning and Management

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AIA Continuing Education Provider

1

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2

Learning Outcomes

- What is strategic planning?
- Why is strategic planning important?
- Strategic Planning Process
 - Pre-work
 - Internal and External Assessments
 - Mission, Vision, and Values
 - Themes, Objectives, Initiatives, Measures
 - Key Performance Indicators
- Plan Management

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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

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

11

Facilitation Options

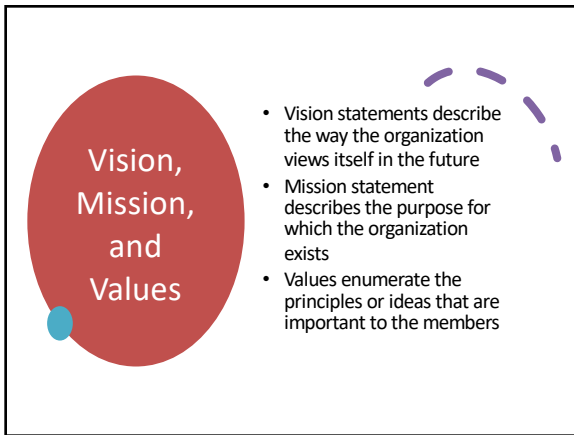


SELF EVALUATION CONSULTANT

12



13



14



15

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

16

Northwestern

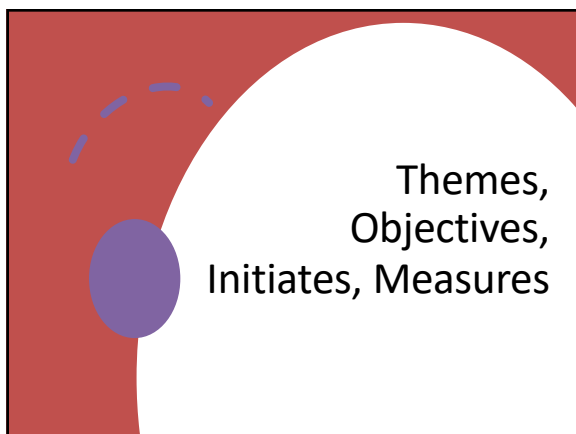
- Vision: Facilities will deliver effective and reliable services as a collaborative and valued partner.
- Mission: To deliver a safe, sustainable, and reliable campus environment as a trusted business partner to the University community.
- Core Values: Respect • Integrity • Safety • Excellence

17

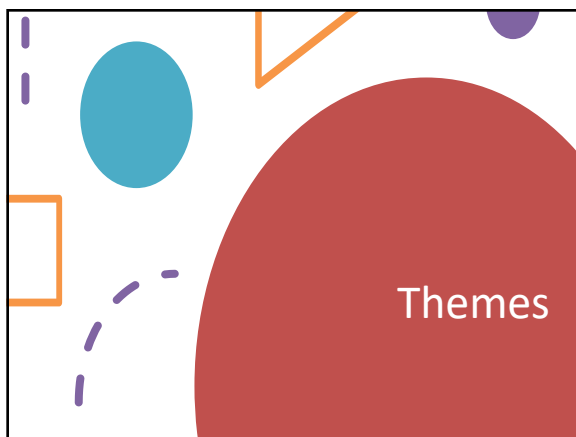
Facilitation Options

 Electronic Survey	 Small Group Discussions	 Unit Meetings
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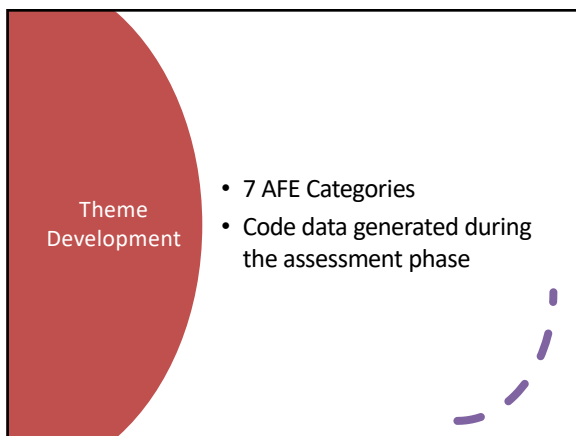
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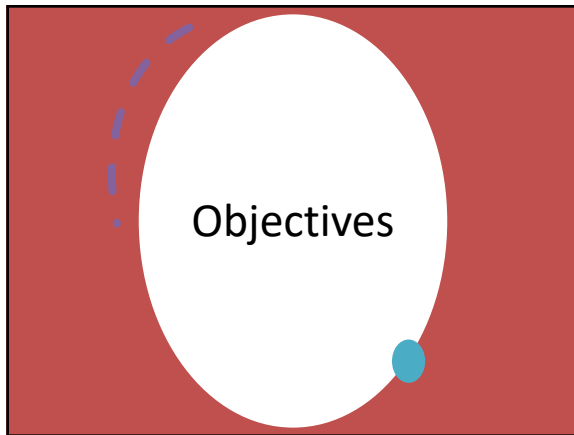


21

Sample

Where To Be In 2023						Legend
Measure ID	Measure Title	Measure Description	Unit	Project Lead	Due Date	Status
GOAL 1: Provide Quality Training and Professional Development						
101	Staff participation in training, meetings, and conferences	Consider activities and options for staff to attend. Consider external and internal sources.	%	Jane Smith	12/31	Ongoing
102	Attendance at professional conferences	Develop a program for awards luncheon and non-affiliated internal and external sources.	%	Jane Smith	12/31	Ongoing
103	Employee attendance at training opportunities	Provide training and professional development opportunities.	%	Jane Smith	12/31	Ongoing
104	Attendance at staff representation at professional events	Submit presentation at national and regional conferences.	%	Jane Smith	12/31	Ongoing
105	Attendance at professional development programs	Provide professional training and development opportunities.	%	Jane Smith	12/31	Ongoing
106	Attendance at staff representation at professional events	Provide staff representation at professional events.	%	Jane Smith	12/31	Ongoing
107	Attendance at professional development programs	Provide professional training and development opportunities.	%	Jane Smith	12/31	Ongoing
108	Attendance at staff representation at professional events	Provide staff representation at professional events.	%	Jane Smith	12/31	Ongoing
GOAL 2: Increase Staff Satisfaction and Engagement						
201	Employee satisfaction survey scores	Conduct employee satisfaction survey annually.	%	Jane Smith	12/31	Annual
202	Staff participation in decision-making	Provide opportunities for staff to provide input and recommendations regarding organizational decisions.	%	Jane Smith	12/31	Ongoing
203	Staff participation in training and development	Provide training and development opportunities.	%	Jane Smith	12/31	Ongoing
204	Staff participation in decision-making	Provide opportunities for staff to provide input and recommendations regarding organizational decisions.	%	Jane Smith	12/31	Ongoing

22



23

Creating Objectives

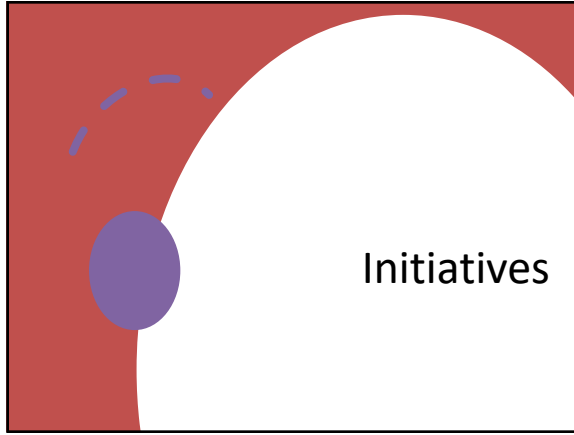
- Under each theme measurable objectives are developed. They are to be written in such a manner as to describe the criteria by which an outcome is judged complete or successful.

24

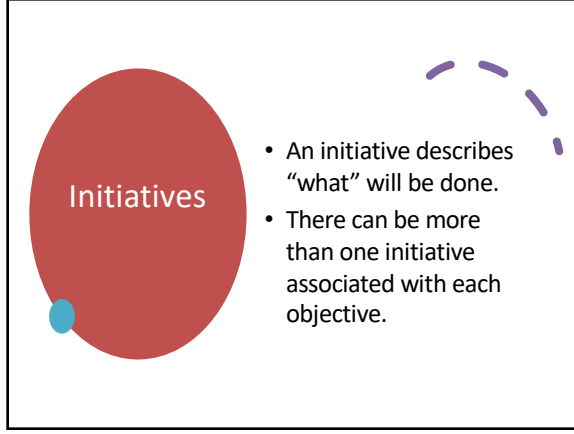
Sample

Where To Be In 2023		INITIATIVE	MEASURABLE	IMPACT	PROJECT LEAD	START DATE	STATUS
OBJECTIVE 10 - Member Training and Professional Development							
101	101.1	101.1.1	101.1.1.1	101.1.1.1.1	101.1.1.1.1	101.1.1.1.1	101.1.1.1.1
OBJECTIVE 11 - Member Business Engagement, Health and Engagement							
111	111.1	111.1.1	111.1.1.1	111.1.1.1.1	111.1.1.1.1	111.1.1.1.1	111.1.1.1.1
112	112.1	112.1.1	112.1.1.1	112.1.1.1.1	112.1.1.1.1	112.1.1.1.1	112.1.1.1.1
113	113.1	113.1.1	113.1.1.1	113.1.1.1.1	113.1.1.1.1	113.1.1.1.1	113.1.1.1.1
114	114.1	114.1.1	114.1.1.1	114.1.1.1.1	114.1.1.1.1	114.1.1.1.1	114.1.1.1.1
115	115.1	115.1.1	115.1.1.1	115.1.1.1.1	115.1.1.1.1	115.1.1.1.1	115.1.1.1.1
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126	126.1	126.1.1	126.1.1.1	126.1.1.1.1	126.1.1.1.1	126.1.1.1.1	126.1.1.1.1
127	127.1	127.1.1	127.1.1.1	127.1.1.1.1	127.1.1.1.1	127.1.1.1.1	127.1.1.1.1
128	128.1	128.1.1	128.1.1.1	128.1.1.1.1	128.1.1.1.1	128.1.1.1.1	128.1.1.1.1
129	129.1	129.1.1	129.1.1.1	129.1.1.1.1	129.1.1.1.1	129.1.1.1.1	129.1.1.1.1
130	130.1	130.1.1	130.1.1.1	130.1.1.1.1	130.1.1.1.1	130.1.1.1.1	130.1.1.1.1

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26

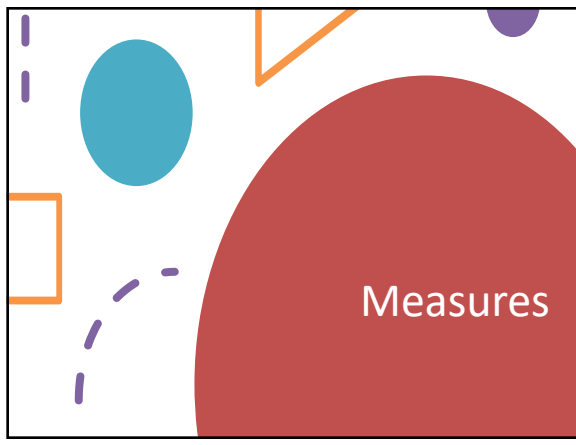


27

Sample


INITIATIVE	MEASURE	UNIT	PROJECT LEAD	START DATE	STATUS
OBJECTIVE 1: Increase Training and Professional Development					
111	Staff participation in training, meetings, and conferences. Consider address and				
112	Develop and roll out a training budget and program. Consider address and				
113	Develop and roll out a training program. Consider address and				
114	Presentations at national and regional conferences.				
115	Presentations at national and regional conferences. Consider address and				
116	Presentations at national and regional conferences. Consider address and				
117	Presentations at national and regional conferences. Consider address and				
118	Presentations at national and regional conferences. Consider address and				
119	Presentations at national and regional conferences. Consider address and				
120	Presentations at national and regional conferences. Consider address and				
OBJECTIVE 2: Increase Staff Satisfaction, Retention, and Engagement					
201	Staff participation in training, meetings, and conferences. Consider address and				
202	Staff participation in training, meetings, and conferences. Consider address and				
203	Staff participation in training, meetings, and conferences. Consider address and				
204	Staff participation in training, meetings, and conferences. Consider address and				
205	Staff participation in training, meetings, and conferences. Consider address and				

28




29

Establishing Measures



A measure defines “how” you will accomplish your initiative.



There can be many measures associated with a single initiative.

30

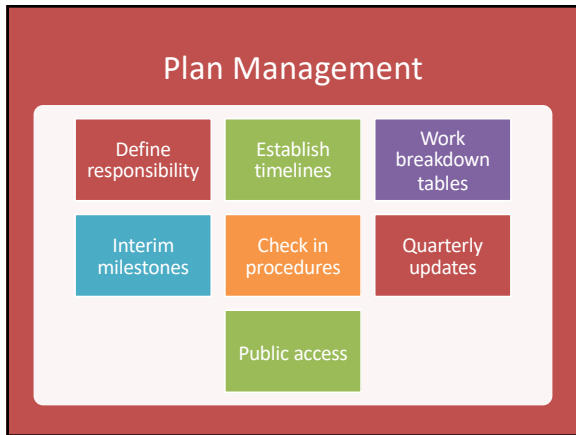
Sample

Where To Be In 2023						Legend	
MEAS	MEAS	MEAS	UNIT	PROJECT CODE	DATE	STATUS	
OBJECTIVE 10 - Increase Training and Professional Development							
101	101	101	101	101	101	101	101
102	102	102	102	102	102	102	102
103	103	103	103	103	103	103	103
104	104	104	104	104	104	104	104
OBJECTIVE 11 - Increase Business Engagement, Health and Engagement							
111	111	111	111	111	111	111	111
112	112	112	112	112	112	112	112
113	113	113	113	113	113	113	113
114	114	114	114	114	114	114	114

31



32

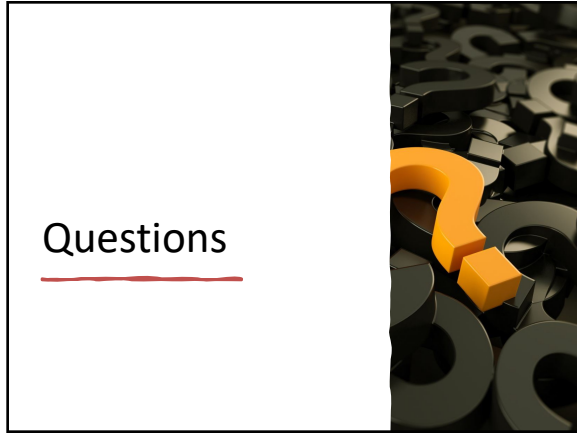


33

Sample

Where To Be In 2023						Legend	
Item	Activity	Item	Activity	Start	Project Lead	Due Date	Status
OBJECTIVE 10 - Member Training and Professional Development							
101	Staff participation in training, meetings, and conferences. Consider address and	101	Staff participation in training, meetings, and conferences. Consider address and	01/17	Joe Smith	03/02 and Ongoing	On Track
102	Develop a program for specialty task and non-affiliated internal and external courses.	102	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
103	Develop a program for specialty task and non-affiliated internal and external courses.	103	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
104	Develop a program for specialty task and non-affiliated internal and external courses.	104	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
105	Develop a program for specialty task and non-affiliated internal and external courses.	105	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
106	Develop a program for specialty task and non-affiliated internal and external courses.	106	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
107	Develop a program for specialty task and non-affiliated internal and external courses.	107	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
108	Develop a program for specialty task and non-affiliated internal and external courses.	108	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
109	Develop a program for specialty task and non-affiliated internal and external courses.	109	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
110	Develop a program for specialty task and non-affiliated internal and external courses.	110	Develop a program for specialty task and non-affiliated internal and external courses.	01/18	Joe Smith	03/02 and Ongoing	On Track
OBJECTIVE 11 - Member Business Engagement, Needs and Expectations							
111	Member Feedback Survey is initiated annually and historical trends are tracked and	111	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
112	Member Feedback Survey is initiated annually and historical trends are tracked and	112	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
113	Member Feedback Survey is initiated annually and historical trends are tracked and	113	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
114	Member Feedback Survey is initiated annually and historical trends are tracked and	114	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
115	Member Feedback Survey is initiated annually and historical trends are tracked and	115	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
116	Member Feedback Survey is initiated annually and historical trends are tracked and	116	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
117	Member Feedback Survey is initiated annually and historical trends are tracked and	117	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
118	Member Feedback Survey is initiated annually and historical trends are tracked and	118	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
119	Member Feedback Survey is initiated annually and historical trends are tracked and	119	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track
120	Member Feedback Survey is initiated annually and historical trends are tracked and	120	Member Feedback Survey is initiated annually and historical trends are tracked and	01/18	Joe Smith	03/02 and Annual	On Track

34



35

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36
