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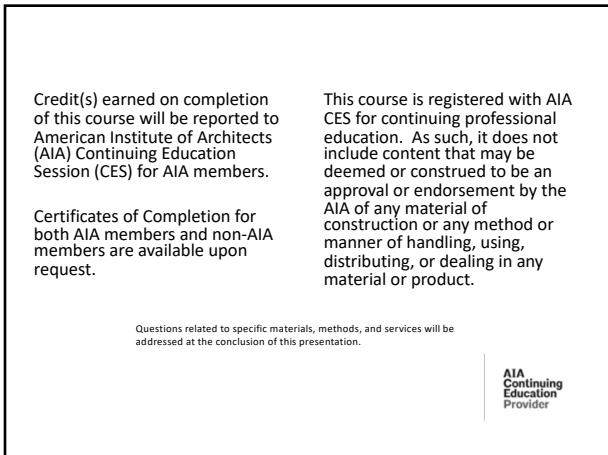
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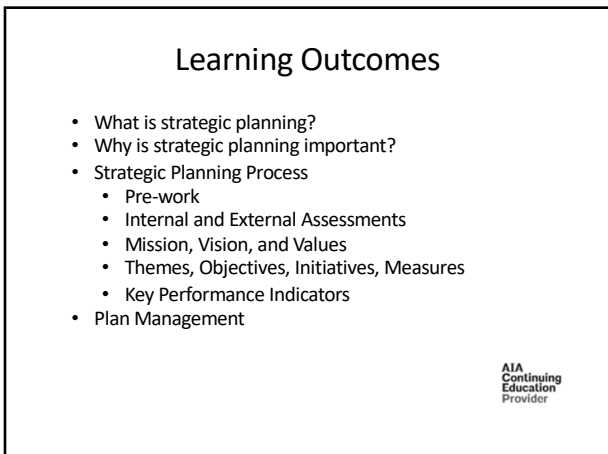
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**What is Strategic Planning?**

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.

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**Why is Strategic Planning Important?**



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**Strategic Planning Process**

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

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### Pre-work




Planning team composition



Strategic planning workshop format and development



Schedule



Potential impediments and organizational issues

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Internal and External Assessments

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

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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.

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Facilitation Options



SMALL GROUPS      ELECTRONIC SURVEY      UNIT MEETINGS

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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

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Facilitation Options



SELF EVALUATION      CONSULTANT

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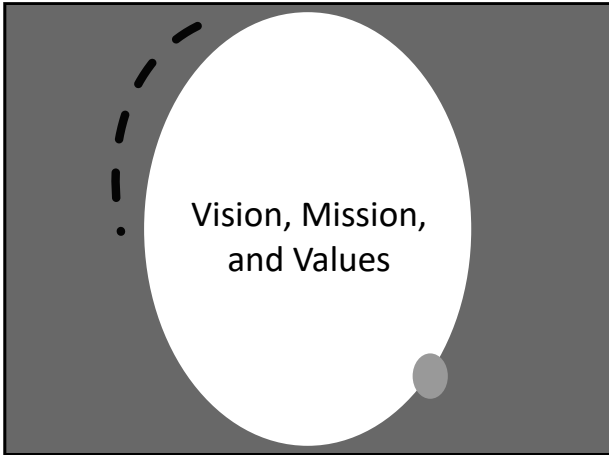
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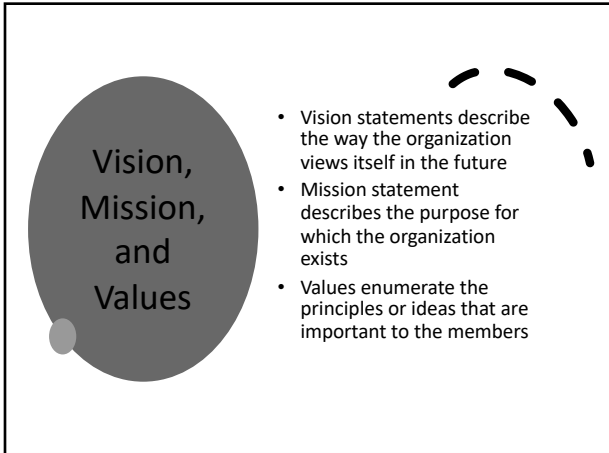
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University of Iowa

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

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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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### Facilitation Options



Electronic Survey



Small Group Discussions



Unit Meetings

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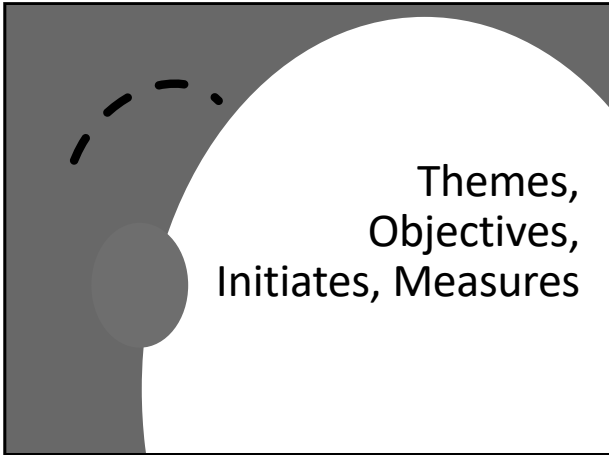
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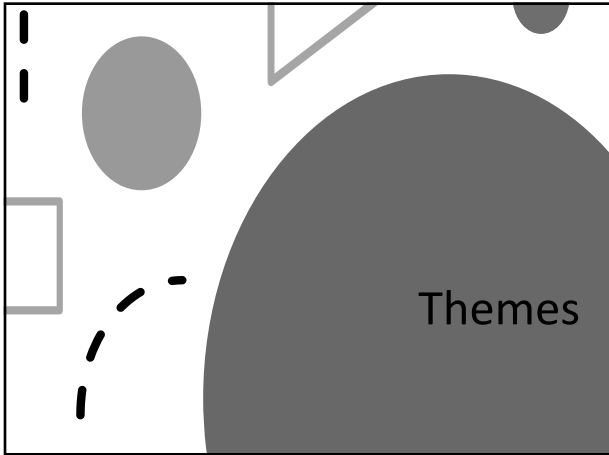
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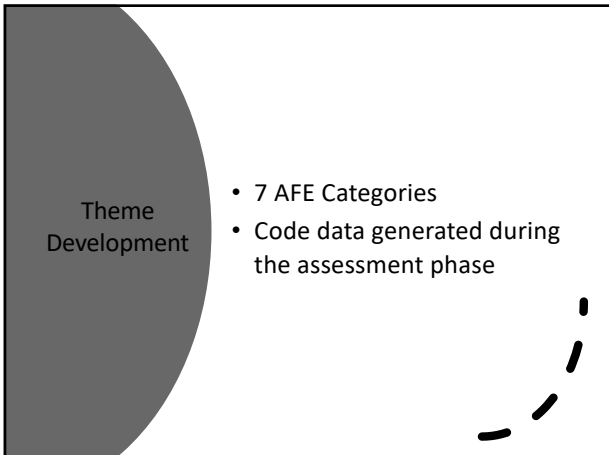
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## Sample

**Where To Be In 2023**

INITIATIVE	DESCRIPTION	MEAS	UNIT	PROJECT LEAD	DUE DATE	STATUS
<b>Objective 1.1 - Invest in Training and Professional Development</b>						
111	Staff participation in training sessions, meetings, and conventions. Consider webinars and		BIT	Joe Smith	12/31 and Ongoing	
112	Develop an on-line training program and associated OERs.		BIT	Joe Smith	12/31 and Ongoing	
113	Allocate budget and opportunities for staff to attend training.		HR, OS, DR	Joe Smith	12/31 and Ongoing	
114	Attend professional and industry conferences.		OS	Joe Smith	12/31 and Ongoing	
115	Provide professional development opportunities to staff through on-line courses.		HR	Joe Smith	12/31 and Ongoing	
116	Attend at least one training course to the building per quarter.		HR	Joe Smith	6/30 and each Quarter	
117	Provide staff of the Professional Development Program.		HR	Joe Smith	6/31, 6/32, 6/33	
118	Identify career tracks and establish career advancement for potential promotion within each		HR	Joe Smith	6/31 and Ongoing	
119	Implement career tracks. Establish measure with each job.		HR	Joe Smith	6/31 and Ongoing	
120	Have employees in OER or OERs to track all training attended by staff members and set		HR	Joe Smith	6/31 and Ongoing	
121	Annual feedback survey for staff for training activities.		HR	Joe Smith	6/31 and Ongoing	
<b>Objective 1.2 - Promote Positive Employee Morale and Engagement</b>						
122	Employee Feedback Survey is initiated annually and historical trends are tracked and		HR	Joe Smith	6/30 and Annually	
123	Make results available to staff and provide strategic recommendations regarding		BIT	Joe Smith	6/30 and Annually	
124	Implement recognition of needs.		HR	Joe Smith	Ongoing	
125	Provide the virtual suggestion box.		HR	Joe Smith	6/31	
126	Implement the virtual suggestion box to offer recognition. Make this for response.		HR	Joe Smith	6/31	
127	Implement an online survey for the recognition program. For monthly programs for		HR	Joe Smith	Ongoing	
128	Individual and group recognition programs should be implemented, such as Staffing, Staff, Worker Awards.		HR	Joe Smith	Ongoing	

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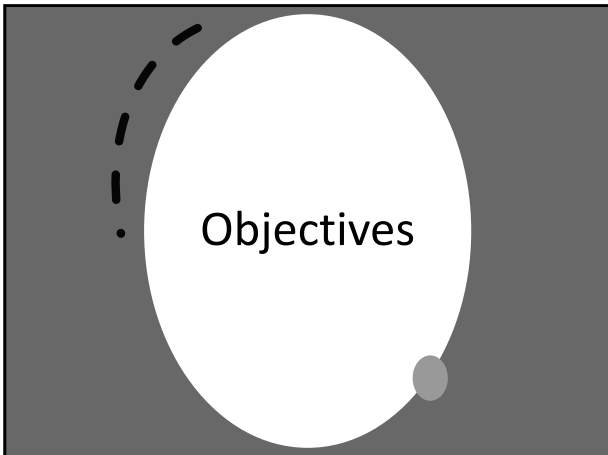
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### Creating Objectives

- 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.

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Sample

Where To Be In 2023

INITIATIVE	MEASURABLE RESULTS	MEASURE	UNIT	PROJECT LEAD	START DATE	END DATE
<b>OBJECTIVE 1.1 - Invest in Training and Professional Development</b>						
111 Staff participate in training, meetings, and conferences. Generate webinars and	111.1 Increase staff training, meetings, and conferences	Hours	Hours	JAC	01/23	Ongoing
112 Allocate budget and opportunities for staff to attend training	112.1 Create a program for quarterly lunch and learn utilizing internal and external sources	Number of staff	Number	JAC	01/23	Ongoing
113 Increase budget and opportunities for staff to attend training	113.1 Increase staff and training opportunities	Percentage of staff	Percentage	JAC, OIA, OPA	01/23	Ongoing
114 Increase staff and opportunities for professional events	114.1 Increase participation in various and regional conferences	Number of staff	Number	OPS	01/23	Ongoing
115 Promote employee leader and employee success through various programs	115.1 Increase employee leader and employee success through various programs	Number of staff	Number	JAC	01/23	Ongoing
116 Provide at least one learning resource to the public per quarter	116.1 Provide at least one learning resource to the public per quarter	Number of resources	Number	JAC	01/23 and each quarter	
117 Promote use of the Professional Development Program	117.1 Promote use of the Professional Development Program	Number of staff	Number	JAC	01/23	Ongoing
118 Increase staff and employee success opportunities for general professional growth and	118.1 Increase staff and employee success opportunities for general professional growth and	Percentage of staff	Percentage	JAC	01/23, 01/24, 01/25	
119 Increase staff and opportunities for professional development programs	119.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Ongoing
120 Increase staff and opportunities for professional development programs	120.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	OPS	01/23	Ongoing
121 Increase staff and opportunities for professional development programs	121.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Ongoing
<b>OBJECTIVE 1.2 - Promote Positive Employee Morale and Engagement</b>						
122 Increase staff and opportunities for professional development programs	122.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Annually
123 Increase staff and opportunities for professional development programs	123.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Annually
124 Increase staff and opportunities for professional development programs	124.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Ongoing
125 Increase staff and opportunities for professional development programs	125.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Ongoing
126 Increase staff and opportunities for professional development programs	126.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Ongoing
127 Increase staff and opportunities for professional development programs	127.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Ongoing
128 Increase staff and opportunities for professional development programs	128.1 Increase staff and opportunities for professional development programs	Percentage of staff	Percentage	JAC	01/23	Ongoing

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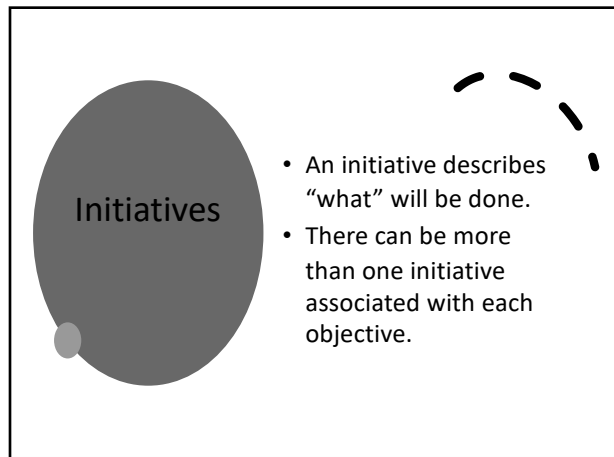
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### Sample

Where To Be In 2023						
MP#1	MP#2	MP#3	MP#4	MP#5	MP#6	MP#7
OBJECTIVE	MILESTONE	MILESTONE	MILESTONE	MILESTONE	MILESTONE	MILESTONE
112	112.1	112.2	112.3	112.4	112.5	112.6
113	113.1	113.2	113.3	113.4	113.5	113.6
114	114.1	114.2	114.3	114.4	114.5	114.6
115	115.1	115.2	115.3	115.4	115.5	115.6
116	116.1	116.2	116.3	116.4	116.5	116.6
117	117.1	117.2	117.3	117.4	117.5	117.6
118	118.1	118.2	118.3	118.4	118.5	118.6
119	119.1	119.2	119.3	119.4	119.5	119.6
120	120.1	120.2	120.3	120.4	120.5	120.6
121	121.1	121.2	121.3	121.4	121.5	121.6
122	122.1	122.2	122.3	122.4	122.5	122.6
123	123.1	123.2	123.3	123.4	123.5	123.6
124	124.1	124.2	124.3	124.4	124.5	124.6
125	125.1	125.2	125.3	125.4	125.5	125.6
126	126.1	126.2	126.3	126.4	126.5	126.6
127	127.1	127.2	127.3	127.4	127.5	127.6
128	128.1	128.2	128.3	128.4	128.5	128.6
129	129.1	129.2	129.3	129.4	129.5	129.6
130	130.1	130.2	130.3	130.4	130.5	130.6
131	131.1	131.2	131.3	131.4	131.5	131.6
132	132.1	132.2	132.3	132.4	132.5	132.6
133	133.1	133.2	133.3	133.4	133.5	133.6
134	134.1	134.2	134.3	134.4	134.5	134.6
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136	136.1	136.2	136.3	136.4	136.5	136.6
137	137.1	137.2	137.3	137.4	137.5	137.6
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139	139.1	139.2	139.3	139.4	139.5	139.6
140	140.1	140.2	140.3	140.4	140.5	140.6
141	141.1	141.2	141.3	141.4	141.5	141.6
142	142.1	142.2	142.3	142.4	142.5	142.6
143	143.1	143.2	143.3	143.4	143.5	143.6
144	144.1	144.2	144.3	144.4	144.5	144.6
145	145.1	145.2	145.3	145.4	145.5	145.6
146	146.1	146.2	146.3	146.4	146.5	146.6
147	147.1	147.2	147.3	147.4	147.5	147.6
148	148.1	148.2	148.3	148.4	148.5	148.6
149	149.1	149.2	149.3	149.4	149.5	149.6
150	150.1	150.2	150.3	150.4	150.5	150.6

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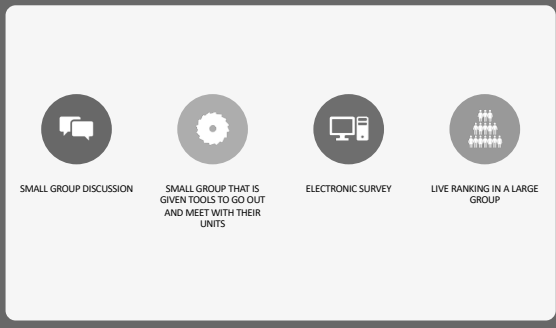
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### Facilitation Options



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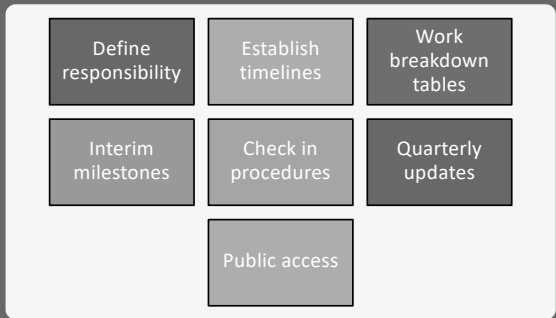
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### Plan Management



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Sample

Where To Be In 2023

INITIATIVE	INITIATIVE	MILES	MILEAGE	UNIT	PROJECT LEAD	DUPLICATE	STATUS
<b>OBJECTIVE 1.1 - Invest in Training and Professional Development</b>							
111	Allocate budget and opportunities for staff member training	1111	Staff participation in training sessions, meetings, and conventions. Consider webinars and	111	See Smith	12/20 and Ongoing	
112	Leadership and staff representation at professional events	1121	Presentations at national and regional conferences	112	See Smith	12/20 and Ongoing	
113	Ongoing maintenance and promotion of online employee toolkit	1131	Update content, track and establish new opportunities for potential promulgability within and	113	See Smith	12/20 and Ongoing	
114	Ongoing enhancement and promotion of the professional development program	1141	Career track. Establish measure with each staff	114	See Smith	12/21 and Ongoing	
115	Use CE/CPE or CE/CPEU information for ability and compliance	1151	Annual technical training goals for all technical services	115	See Smith	12/21 and Ongoing	
<b>OBJECTIVE 1.2 - Promote Positive Employee Morale and Engagement</b>							
121	Conduct Employee Feedback Survey	1211	Employee Feedback Survey is initiated annually and historical trends are tracked and	121	See Smith	12/21 and Annually	
122	Seek employee feedback	1221	Behavioral the virtual suggestion box to offer an optional flexible form for response	122	See Smith	12/21	

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Questions

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COURSE**

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Continuing  
Education  
Provider

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