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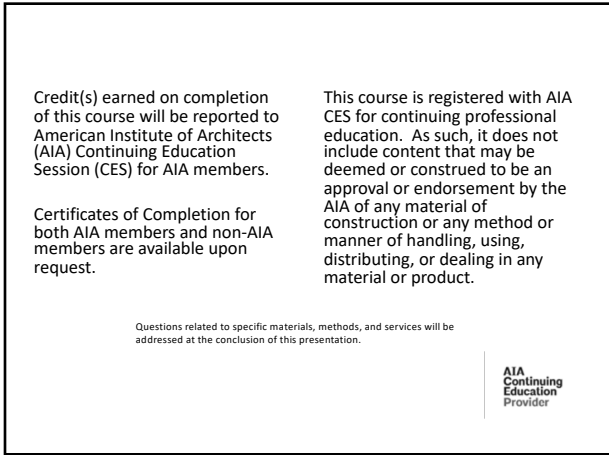
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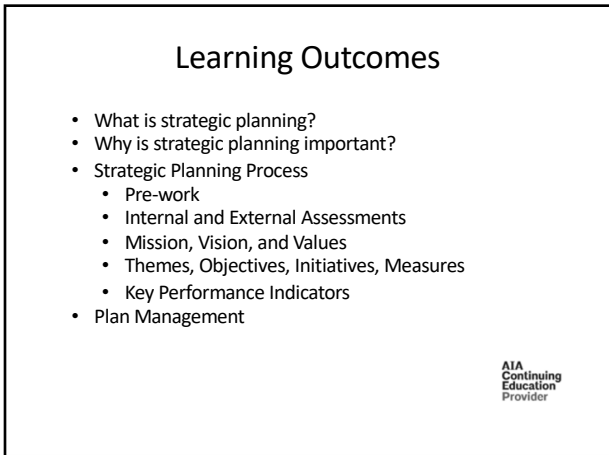
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**What is Strategic Planning?**

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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### 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)

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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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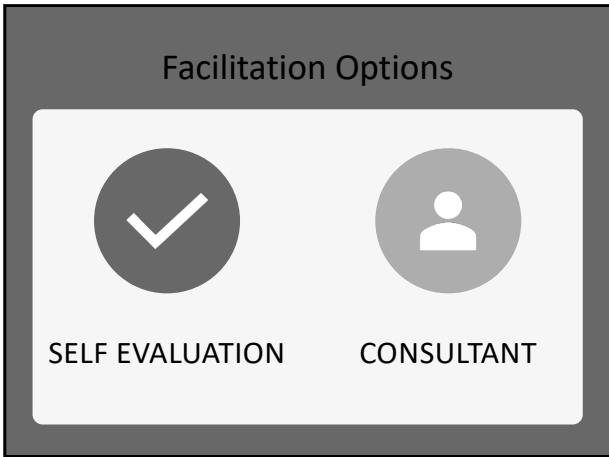
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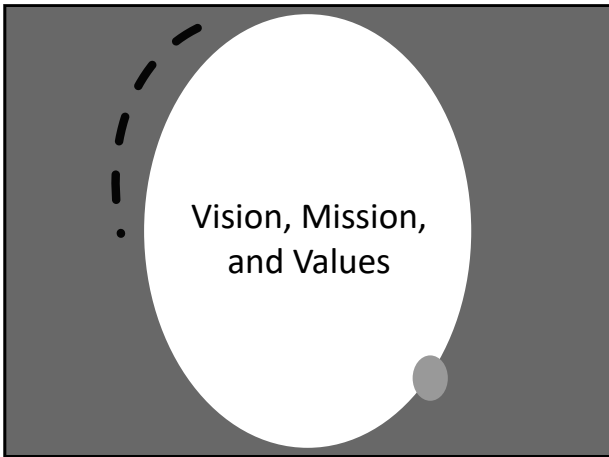
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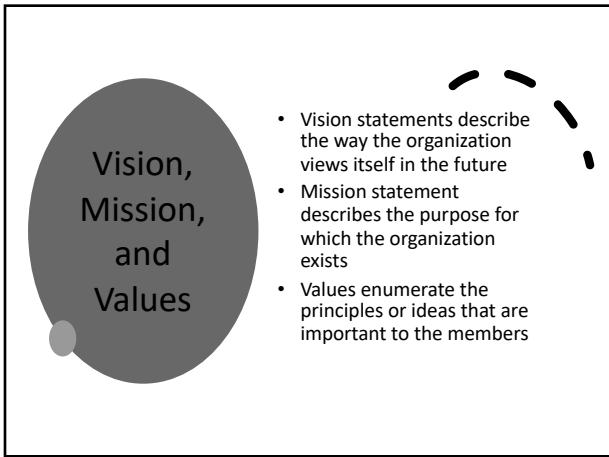
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# University of Chicago

- 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

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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

The slide features a dark grey background with a white rounded rectangle in the center. Inside the rectangle, three icons are arranged horizontally: a computer monitor and smartphone for 'Electronic Survey', two speech bubbles for 'Small Group Discussions', and a group of three people for 'Unit Meetings'.

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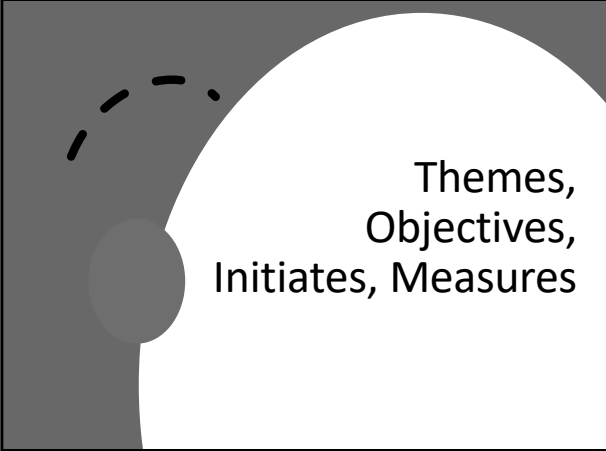
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Themes,  
Objectives,  
Initiates, Measures

The slide has a dark grey background with a large white semi-circle on the right side. The text is centered within the white area. On the left, there are abstract shapes: a dashed arc, a solid circle, and a solid semi-circle.

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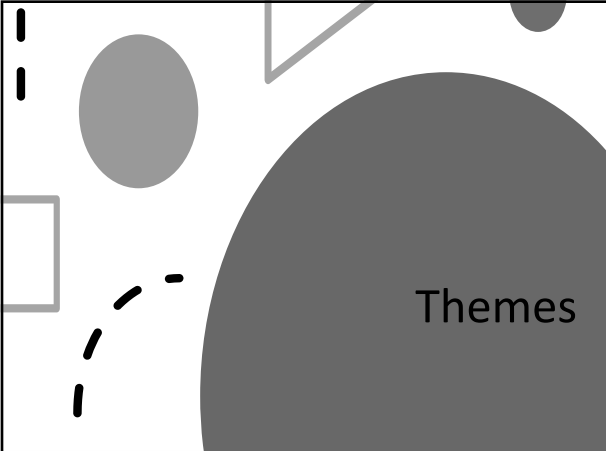
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Themes

The slide features a dark grey background with a large white semi-circle on the right side. The text is centered within the white area. The left side is decorated with various abstract shapes: a vertical dashed line, a solid circle, a solid semi-circle, a solid rectangle, and a dashed arc.

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## Theme Development

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

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### Sample

Where To Be In 2023							Status	
INITIATIVE	MEASURE	UNIT	PROJECT LEAD	RUE DATE	STATUS	START	END	
<b>OBJECTIVE 1.1 - Invest in Training and Professional Development</b>								
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 opportunities.	FBS	Joe Smith	12/31	On Track			
113	Attend professional conferences, seminars, and regional conferences.	FBS, OPS, OTC	Joe Smith	12/31	On Track			
114	Provide employee tuition aid. Benchmark current tuition to show increase over time.	FBS	Joe Smith	12/31	On Track			
115	Identify at least one training resource for the next year quarter.	FBS	Joe Smith	9/30	On Track			
116	Provide one of the professional development programs.	FBS	Joe Smith	9/30	On Track			
117	Identify career tracks and establish core competencies for potential promotion with each track.	FBS	Joe Smith	6/30	On Track			
118	Conduct a survey to assess employee interest in training.	FBS	Joe Smith	6/30	On Track			
119	Use OTC's or OTC's information for stability and compliance.	OPS	Joe Smith	6/30	On Track			
<b>OBJECTIVE 1.2 - Promote Employee Retention and Engagement</b>								
120	Employee Feedback Survey is initiated annually and historical trends are tracked and reported.	FBS	Joe Smith	6/30	On Track			
121	Make reports available to staff and provide strategic recommendations regarding work/life balance.	ST	Joe Smith	6/30	On Track			
122	Conduct an employee feedback survey.	FBS	Joe Smith	6/30	On Track			
123	Implement the annual engagement survey.	FBS	Joe Smith	6/30	On Track			
124	Implement the annual engagement survey to offer employees/clients a feedback mechanism.	FBS	Joe Smith	6/30	On Track			
125	Implement the annual engagement survey to offer employees/clients a feedback mechanism.	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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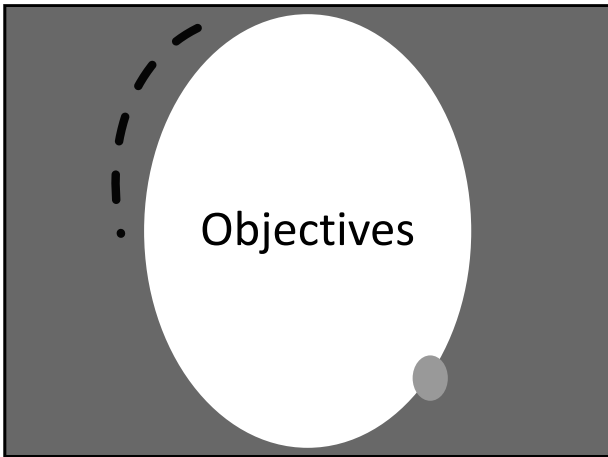
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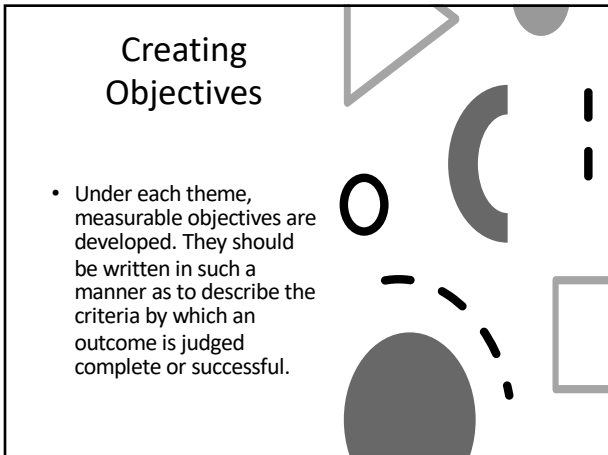
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**Sample**

**Where To Be In 2023**

INITIATIVE	MEASURABLE	RESPONSE	UNIT	PROJECT LEAD	DUPLICATE	STATUS
<b>OBJECTIVE 1.1 - Invest in Training and Professional Development</b>						
111	Staff participation in training sessions, meetings, and conferences. Consider webinars and	111.1 Schedule and conduct training sessions and conferences.	SLT	See Smith	12/23 and Ongoing	
112	Develop a budget and opportunities for staff in attendances.	112.1 Develop a program for quarterly lunch and learn sessions (internal and external sources).	PAI	See Smith	12/23 and Ongoing	
113	Attendee budget and opportunities for professional events.	113.1 Schedule conferences, seminars and regional conferences.	PAI, OPA, OPA	See Smith	12/23 and Ongoing	
114	Provide employee training and development opportunities to allow business users cross	114.1 Ask all users who are training resources to be trained per course.	PAI	See Smith	12/23 and Ongoing	
115	Provide user of the Professional Development Program.	115.1 Monitor user track and establish user completion by general availability within unit.	PAI	See Smith	12/23 and Ongoing	
116	Engage enhancement and promotion of the professional development program.	116.1 Monitor user track. Establish measure with each unit.	PAI	See Smith	12/23 and Ongoing	
117	Use CATI or CATVS information for mobility and compliance.	117.1 Send technical training email for feedback actions.	OPA	See Smith	12/23 and Ongoing	
<b>OBJECTIVE 1.2 - Promote Positive Employee Morale and Engagement</b>						
121	Employee Feedback Survey is initiated annually and historical trends are tracked and	121.1 Establish	PAI	See Smith	12/23 and Annually	
122	Make results available to staff and provide strategic recommendations regarding	122.1 Provide survey report of trends.	SLT	See Smith	12/23 and Annually	
123	Promote the virtual suggestion box.	123.1 Promote the virtual suggestion box.	PAI	See Smith	Ongoing	
124	Implement the virtual suggestion box to offer a national "kudos" list for response.	124.1 Implement communication email to introduce a process to recognize response for	PAI	See Smith	12/23	
125	Evaluate and report on a wide community email with us, follow, face, share search	125.1 Evaluate and report on a wide community email with us, follow, face, share search	PAI	See Smith	Ongoing	

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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.

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## 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 below	0020 and 02000
		111.2 Develop a program for quarterly (and non-attending) internal and external courses.	01/01	12/31	High	see below	0020 and 02000
		111.3 Incorporate cross and training opportunities.	01/01	12/31	High	see below	0020 and 02000
		111.4 Select presenters for internal and regional conferences.	01/01	12/31	High	see below	0020 and 02000
		111.5 Present employees with an American passport with a show/expense over \$100.	01/01	12/31	High	see below	0020 and 02000
		111.6 Add at least one training measure to the budget per partner.	01/01	12/31	High	see below	0020 and 02000
		111.7 Measure employee feedback on American passport with a show/expense over \$100.	01/01	12/31	High	see below	0020 and 02000
		111.8 Measure employee feedback on American passport with a show/expense over \$100.	01/01	12/31	High	see below	0020 and 02000
		111.9 Measure employee feedback on American passport with a show/expense over \$100.	01/01	12/31	High	see below	0020 and 02000
		111.10 Measure employee feedback on American passport with a show/expense over \$100.	01/01	12/31	High	see below	0020 and 02000
0001000 1.2 - Promote Positive Employee Morale and Engagement	122 Employee Feedback Survey	122.1 Employee Feedback Survey is initiated annually and historical trends are tracked and	01/01	12/31	High	see below	0020 and 02000
		122.2 Make work visible to staff and provide strategic recommendations regarding	01/01	12/31	High	see below	0020 and 02000
		122.3 Conduct Employee Feedback Survey	01/01	12/31	High	see below	0020 and 02000
		122.4 Measure employee feedback	01/01	12/31	High	see below	0020 and 02000

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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**

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## Plan Management

Define responsibility

Establish timelines

Work breakdown tables

Interim milestones

Check in procedures

Quarterly updates

Public access

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## Sample

							STATUS	
							NOT STARTED	IN PROGRESS
							90%+ WORK IS DONE	COMPLETE
							LATE	COMPLETED
INITIATIVE	MILESTONE	MEASURE	UNIT	PROJECT LEAD	DUPLICATE	STATUS		
<b>OBJECTIVE 1.1 - Invest in Training and Professional Development</b>								
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	See Smith	11/24 and Ongoing			
112	Leadership and staff representation at professional events	112.1 Represent organization in national and regional conferences.	112	See Smith	11/24 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	See Smith	11/24 and Ongoing			
114	Ongoing enhancement and promotion of the professional development program	114.1 Career track. Establish measure with each unit.	114	See Smith	11/24 and Ongoing			
115	Use CMTA's or CMTAUS information for ability and compliance	115.1 Annual technical training plan for all technical services.	115	See Smith	11/24 and Ongoing			
<b>OBJECTIVE 1.2 - Promote Employee Health and Engagement</b>								
121	Employee Feedback Survey is released annually and historical trends are tracked and distributed	121.1	121	See Smith	11/24 and Annually			
122	Continue Employee Feedback Survey	122.1 Make results available to staff and provide strategic recommendations regarding resolution of concerns.	122	See Smith	11/24 and Annually			
123	Seek employee feedback	123.1 Promote the virtual suggestion line to offer an optional flexible form for response.	123	See Smith	Ongoing			
124	Conduct and engage in regular community outreach such as Safety, Open House events	124.1 Promote communication regarding maintenance processes for regular programs for	124	See Smith	Ongoing			

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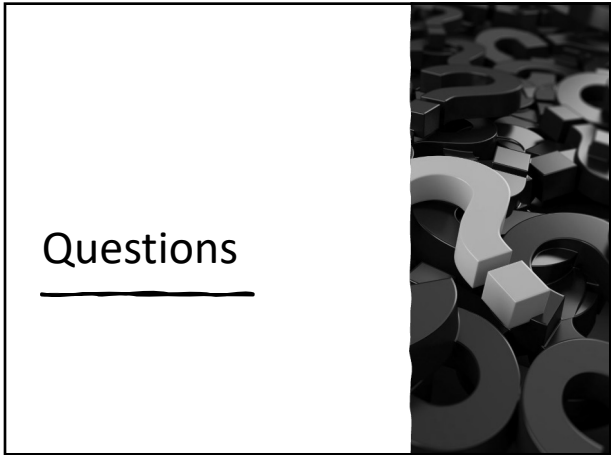
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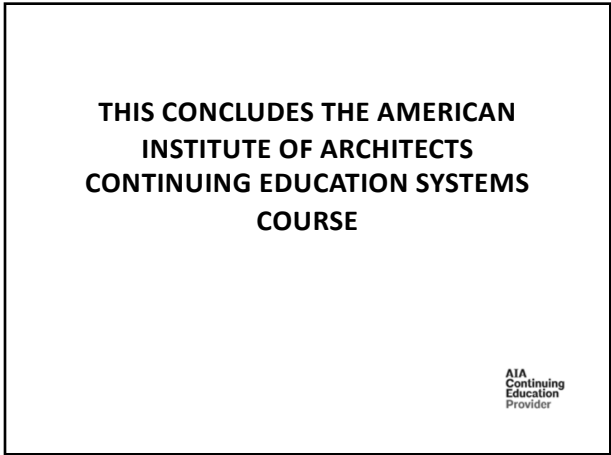
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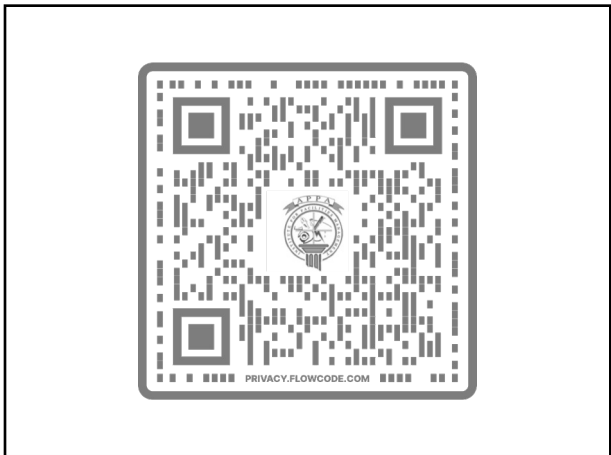
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