

STRATEGIC PLANNING

PROCESS AND DEFINITIONS

by Strumpf Associates: *Center for Strategic Change*

Dialogue Guidelines:

- Suspend certainty
- Seek to expand the inquiry
- Grow ideas rather than taking a position
- *Listen*
- Be open rather than attaching to outcomes

Positioning for the Future

- It is change, continuing change, inevitable change, that is the dominant factor in society today. No sensible decision can be made any longer without taking into account not only the world as it is, but the world as it will be.
 - *Isaac Asimov*
- If you don't know where you are going, you will probably end up somewhere else.
 - *Lewis Carroll*

Strategic Thinking and Management

- Strategic planning is only useful if it supports strategic thinking and leads to strategic management - the basis for an effective organization. Strategic thinking means positioning the organization for future success by anticipating the future environment and always asking 'are we doing the right thing?'

Strategic Management

- The application of strategic thinking to the job of leading an organization. The following is a framework for understanding strategic management: continually asking the question, "Are we doing the right thing?" It entails attention to the "big picture" and the willingness to adapt to changing circumstances, and consists of the following three elements:
 - **formulation of the organization's future mission in light of changing external factors such as regulation, competition, technology, and customers**
 - **development of a competitive strategy to achieve the mission**
 - **creation of an organizational structure which will deploy resources to successfully carry out its competitive strategy.**
- Strategic management is adaptive and keeps an organization relevant. In these dynamic times it is more likely to succeed than the traditional approach of "if it ain't broke, don't fix it."

Process

- Visioning
- Environmental Scan
 - Focus Groups
 - Research
- Strategic Planning Team
 - Analysis of the data
 - Identify strategic challenges
 - Develop the strategy for the organization

STRATEGIC CHALLENGES

- THOSE PRESSURES THAT EXERT A DECISIVE INFLUENCE ON AN ORGANIZATION'S LIKELIHOOD OF FUTURE SUCCESS

VISION

- DESIRED FUTURE STATE OF AN ORGANIZATION
 - DESCRIBES WHERE AN ORGANIZATION IS HEADED
 - WHAT IT INTENDS TO BE
 - HOW IT WISHES TO BE PERCIEVED

VISIONING

- A vision is a snapshot in our mind's eye of how we want to look, act, achieve and interface with others at some point in the future.
- What is the future? It is not something waiting for us but it is something we create. The future is time and potential resources waiting to form, the not-yet waiting to be programmed.

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- Tomorrow is either the sum of our pasts or the sum of our yearnings for what we may become.

A Vision is:

- A simple picture of what the future means
 - It declares what is important, purposive, and valuable
- A poetic picture, not a literal statement
- A promise that is convincing. To think it is to go for it
- A pull toward it from without and a push toward it from within

A Vision is:

- Energy as much as anything else. We know we have a vision when we get positive energy every time we think of it.
- Like a haunting refrain. We know we have a vision when it won't let us go and others are attracted to it.
- An inspiration and motivation.

Types of Visioning

- For individuals – the customer
- For the organization to be the best
- For the organization's role in the community

VALUES

- GUIDING PRINCIPLES AND/OR BEHAVIORS THAT EMBODY HOW THE ORGANIZATION AND ITS PEOPLE ARE EXPECTED TO OPERATE
- REFLECT AND REINFORCE THE DESIRED CULTURE OF THE ORGANIZATION
- SUPPORT AND GUIDE THE DECISION MAKING OF EVERY EMPLOYEE

MISSION

- THE OVERALL FUNCTION OF THE ORGANIZATION – WHAT IS THE ORGANIZATION ATTEMPTING TO ACCOMPLISH?

GOALS

- FUTURE CONDITION OR PERFORMANCE LEVEL THAT ONE INTENDS TO ATTAIN
- BOTH SHORT AND LONG TERM
- ENDS THAT GUIDE ACTIONS

STRETCH GOALS

- DESIRED MAJOR, NONINCREMENTAL AND BREAKTHROUGH IMPROVEMENTS

STRATEGIC OBJECTIVES

- AN ORGANIZATION'S ARTICULATED AIMS OR RESPONSES TO ADDRESS MAJOR CHANGE OR IMPROVEMENTS
- GENERALLY FOCUSED EXTERNALLY
- WHAT AN ORGANIZATION MUST ACHIEVE TO REMAIN OR BECOME COMPETITIVE

SWOT

- STRENGTHS
- WEAKNESSES
- OPPORTUNITIES
- THREATS

STRENGTHS

- ORGANIZATIONAL ENVIRONMENT
- ORGANIZATIONAL RELATIONSHIPS

ORGANIZATIONAL CHALLENGES

- COMPETITIVE ENVIRONMENT
- STRATEGIC CHALLENGES
- PERFORMANCE IMPROVEMENT SYSTEM

ABOUT Lori

Lori Strumpf has over twenty-eight years in the field of organizational development and change management in human services organizations and associations. Lori has been in business as ***Strumpf Associates: Center for Strategic Change*** for the last 28 years. She is a nationally known expert in organizational management, training and design for education, training, and human resource development systems. Prior to starting her business, Lori was the Assistant Director for the National Association of Private Industry Councils. She is on the board of the National Youth Employment Coalition and was a founding member. She has been a Senior Associate at Brandeis University, Center for Human Resources, Heller School for Public Policy. Prior to moving to Washington, D.C. to work on the Vice President's Task Force for Youth Employment, Lori was the Assistant Director to a project for court diverted delinquent youth. She also worked at Florida State Prison, counseling prisoners.

Strumpf Associates is a small cadre of training and consulting experts, headquartered in Washington, DC. The Principals in Strumpf Associates have decades of experience helping organizations manage change, build systems, build leadership teams, and improve program quality and customer satisfaction. The Center provides organizational change management consulting and executive coaching to schools, workforce organizations, and welfare organizations.

Lori Strumpf has a Masters and Specialist Degree in Educational Counseling from the University of Florida.

Strumpf Associates: Center for Strategic Change

- **Our Mission...**

Managing change. Building systems. Improving quality. Helping organizations re-think their business and refine their services. Strumpf Associates: Center for Strategic Change helps human resource organizations improve the quality of their delivery systems and services by ensuring the connection to workplace skills. We provide technical assistance, leadership training, partnership facilitation, creative problem solving and practical research - all designed to improve customer satisfaction.

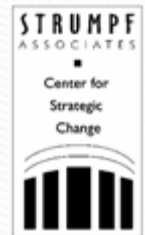
- **Our Vision...**

We excel at partnership with our customers to invest our resources, skills, ingenuity, and dedication to create positive change. We seek to do all we can to inspire others to join us and make a difference within their communities.

- **What We Do...**

The Center for Strategic Change works with community leaders, policymakers, and program practitioners to:

- Facilitate strategic planning
- Improve collaborative management
- Build leadership teams
- Design and improve human resource systems
- Develop consolidation strategies
- Integrate basic skills and workplace literacy
- Implement competency-based, functional context instruction
- Design performance management and accountability systems



We offer a wide variety of training services in:

- Creative Problem Solving
- Team Building for Quality Services
- Program Design: Quality Programs for Quality Results
- Continuous Quality Improvement
- Program Evaluation and Continuous Improvement
- School-to-Work: Building a System
- How to Make "One Stops" a One Stop
- Employability Assessment and Service Planning
- Authentic Performance-Based Assessment
- Interviewing as an Assessment Strategy
- Job Task Analysis: Connecting Training to the Marketplace
- Functional Context Instruction (Also available on CD-ROM)

Who We Work With...

We work with public education systems, workforce development systems, welfare organizations, public interest groups, professional associations, community wide consortiums, training institutes, universities and community colleges, and federal, state, and local governments.

Our clients include the states of Connecticut, Florida, Indiana, Kansas, Kentucky, Louisiana, Michigan, New York, Ohio, Oregon, Washington, and the District of Columbia; public school systems and School Boards in Connecticut, Georgia, New York, and Rhode Island; and numerous national associations and public interest organizations including the American Society for Training and Development (ASTD), the Educational Testing Service (ETS), and the National Governors' Association (NGA).

How We Work...

We start where you are. We assess your needs and your priorities, and we hand-tailor our training and technical assistance around them. We focus both on the content of what you do, and the process for getting it done.

We don't work with just anyone. We work with individuals and institutions that are ready to embrace change, willing to take prudent risks, and able to discard old notions of turf and habit. We help our clients craft a new vision and see it through.

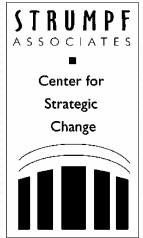
We work collaboratively with you, and we help you work collaboratively with your colleagues. We don't preach C we coach. We model the behaviors that we try to instill. And we model the use of state-of-the-art technology to help improve customers' access to services, and help improve the quality and delivery of those services.

Why We're In Business...

We understand the special challenges facing public institutions today C budget cuts, complex and often conflicting regulations, downsizing, program consolidation. And the economic and political environment is constantly changing. "Business-as-usual" is out.

Organizations need to anticipate and manage change, redesign and streamline operations, reduce costs, and improve program quality and customer service. That's where we come in.

We're tuned in to political and legislative changes, new directions within Federal agencies, and the implications for both the public and private sectors. We can help you speed the pace of change.



Who We Are...

Strumpf Associates is a small cadre of training and consulting experts. We are headquartered in Washington, DC. The president and founder, Lori Strumpf, is a nationally known expert in training and design for education, training, and human resource development systems.

Principals in Strumpf Associates have decades of experience helping organizations manage change, build systems, build leadership teams, and improve program quality and customer satisfaction.

How To Learn More...

For more information about **Strumpf Associates: *Center for Strategic Change***, please call. Telephone: 202.872.0776 Fax: 202.872.0377
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