How to Develop a Blueprint to Build a Sustainable Future for your Institution!
Agenda

1. Rationale for Planning
2. What Type of Planning Should You Do?
3. Why Should You Plan?
4. What is the Planning Process?
5. Keys to Successful Planning?
6. Q & A
"The best way to prepare for the future is to create it!"

"It ain't so much what you don't know (about planning) that can hurt you, it's what you do know that just ain't so!"
Proper Planning

Planning = Sustainability

- Financially Sustainable
- Data-Driven Decisions
- Satisfied Constituents
- Clarity, Focus & Momentum
- Verifiable Impact
- High Performing Institution
- Stakeholder Commitment
Types of Plans?

1. Tactical Planning: short-term, “ad hoc,” typically has a single focus & closure

2. Long-range Planning: 1 year horizon, incrementally builds on past accomplishments, more, better, different of the same with annual checkups but not strategic

3. Strategic Planning: 1-3 year horizon, sets in motion a new non-existing set of actions, programs or services unencumbered by past or current realities with annual checkups

4. Scenario Planning: explore possible alternative “realities” of what might impact your institution to identify a relevant course of action in response

5. Hybrids???
Why Should You Plan?
Your institution has many possible roles it could play which raises hard questions...

1. What is our real mission?
2. How true are we to the mission?
3. How do we know we are true to the mission?
4. What are our capabilities & limitations?
5. Are we successful now? By what measure?
6. What will success look like in the future?
7. What is our current visibility & credibility?
8. How do we ensure our sustainability?

Strategic Planning is the time to answer these questions!
What is the Planning Process?
The Strategic Planning process should determine your “As Is” & “To Be” state & produce a Change Management Plan* to close the gap!

**The Gap**

- **Compelling Forces**
  - Increasing Competition
  - Rising Expectations
  - Student Growth
  - Resource Restraints

- **Resistant Forces**
  - Capacity Limitations
  - Diffused Focus
  - Conflicting Priorities
  - Existing Workloads

- **“As Is!”**
- **“To Be?”**
Inventory: A comprehensive & objective review of factors that could or do impact your institution.

Mission: Answers the questions, “Why do we exist?” “What are we trying to accomplish?”

Goal Areas: Broad areas of activities 1) Programs, 2) Services, 3) Staff & Faculty, 4) Operations, 5) Facilities, 6) Governance, 7) Advocacy, 8) Marketing, 9) Fundraising.

Objectives: Time-limited, measurable activities that define the goal areas.

Action Steps: Day-to-day activities necessary to achieve specific objectives.
Inventory, SWOT Analysis or Scan:

A comprehensive & objective review of factors that could or do impact your institution which may include any or all of the following tools:

1. Board Effectiveness Survey completed only by the Board
2. Planning Survey of Board, Leadership, Faculty & Staff
3. Interviews with Administration & Board Officers
4. Interviews with alumni, church leadership, donors
5. Surveys & focus groups with students, parents
6. Review existing plans, relevant documents, etc.
7. Research on other similar institutions
The Structure of the Strategic Plan

Mission

Programs
- Objective
  - Action Steps
    1) 2) 3) 4)

Facilities
- Objective
  - Action Steps
    1) 2) 3) 4)

Fundraising
- Objective
  - Action Steps
    1) 2) 3) 4)
## Institutional - Action Planning

**Goal Area:**

**Objective:**

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- Additional "owners"
- Meeting / call schedule
Keys to Successful Planning

1. Be Inclusive
2. Build Consensus
3. Treat Nothing as Sacred
4. Take a “No Excuses” Approach
5. Make Data-Driven Decisions
6. Ensure Measurability & Accountability
7. Be Future Focused
8. Be Sure to Use the Plan
9. Build in Follow-Up
Thank You!

Integrated Organizational Development, Inc.
www.iodinc.com

John Curtis • 407-493-7323 • jcurtis@iodinc.com
David Sayers • 540-808-7997 • dsayers@iodinc.com