



Simplified Strategic Planning Guide
TypeFocus7 Program

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Simplified Strategic Planning Guide

TypeFocus7 Program

Introduction

Strategic planning is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy. It may also extend to control mechanisms for guiding the implementation of the strategy.

Strategy has many definitions, but generally involves setting goals, determining actions to achieve the goals, and mobilizing resources to execute the actions. A strategy describes how the ends (goals) will be achieved by the means (resources).¹

The purpose of this guide is to provide a framework based on good practices that will assist a career service office create a workable strategic plan in one day.

Who Are We – Why Do We Exist? Mission Statement

Ratify a mission statement following this template:

- To (action word) (something) by or through (some process).

Example from Monroe Community College:

The mission of Career Services is to enhance student success by providing comprehensive career and employment services.

Where Are We Going? Simple Four-Step Model

Step 1: Take an Inventory as a Starting Point

The SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis helps you look critically at your career services department.

Assess your strengths and weaknesses by answering these questions: What do we do best? What do we not do best? What are our college's resources? What are our departmental capabilities?

Assess your opportunities and threats by answering these questions: What is happening externally that will affect the services we offer? What are the driving forces behind career services trends? What are important and potentially important student populations? What is happening in the world that might affect our career efforts?

¹ https://en.wikipedia.org/wiki/Strategic_planning

Step 2: Develop Outcomes, Goals and Action steps

Setting Outcomes

An outcome is the ultimate benefit you hope to achieve through your strategic plan. It is different from an output, which is a deliverable that you create through setting a goal. Outcomes set the agenda, are broad, and global in nature.

Note: you invest your resources and do the day-to-day work to create outputs ... in the hope that they will lead to outcomes. There's no guarantee

Note: outputs by themselves fail to pass the "So what?" test. So *what* if you offer career assessments, interviewing skills workshops, resume tips, etc. if these efforts do not lead to a positive outcome?

The model looks like this:

Inputs:	Processes:	Outputs:	Outcomes:
The resources you have available, which includes money, people, technology, etc.	These are the day-to-day activities performed to achieve the outputs. E.g. debrief assessment results.	These are the deliverables that result from the processes and normally are called goals. You have total control over them. E.g. interviewing skills workshops ... these should logically lead to your outcomes. E.g. increased employment.	These are the benefits you hope to realize by accomplishing your goals. You do not have total control over them. E.g. Obtaining employment may go up or down due to events outside your control.

What do you think about this statement? A reasonable outcome for any career department is to increase student outreach by 5-10% over last year's baseline.

Now, what will you do differently to make this happen? The key word here is *DO* ... and you organize your "doing" by creating goals. For example, would you set a goal to: Adopt a First Year Experience Program? Advertise more? Offer career services in the student cafeteria? Increase relationships with local schools? Develop partnerships with other stakeholders? Integrate the TypeFocus7 program into your standard operating procedures?

Setting Goals

Realistic goals and action steps are developed from the SWOT analysis. Write two to five goals that give action to your mission statement and consider your SWOT analysis and desired outcomes. Then, develop action steps to achieve each goal.

If your SWOT analysis identified reports of students complaining because their request for a counseling appointment was taking up to three weeks you might set a goal for improved service delivery: All counseling requests will be responded to within two days.

You would set this goal if you believed it would increase the attainment of your mission.

Tips:

- Focus on low hanging fruit – defined as a big payoff for a small investment.
- Do not attempt too much because you will lose your focus
- Make sure the goals you set are *SMART*: specific, measurable, attainable, relevant and time framed.

Setting Action Steps

Consider this analogy: goals are the ladder; action steps are the rungs in the ladder and the wall you place the ladder against is your desired outcome.

Examples of possible action steps to speed up slow response times for counseling appointments:

- Create a web-based response system
- Re-allocate existing resources to focus on responses
- Justify additional staff to handle the workload

Note: your goal is NOT to add another person because you have no control over that ... your goal is to write a proposal to justify the addition. This goal is perfectly within your control, so it is *SMART* – especially the attainable part.

If your output goal is the proposal, then these might be your action steps:

- Identify the data sources you will use to justify the new hire.
- Identify the benefits against the costs; what data will support your claims? Can they be monetized?
- Create a job description for the new position that addresses the immediate problem.
- Write a proposal for the decision-maker to consider. See the appendix for tips on presentations.
- If approval is granted, initiate the hiring process, and track the agreed-upon results.

Step 3: Implement Programs

If all your goals and action steps are *SMART*, fill out a form like this and have the manager or director of the department monitor them. List the specific action steps, timelines, and responsible individual for each step necessary to complete the action steps.

Goal #1:		
Action steps	Due Date	Person Responsible
1.		
2.		
3.		

Step 4: Evaluate Your Goals and Track Outcome Measures

Goals are typically evaluated by three criteria:

- Timeliness – were deadlines met?
- Quantity – how many services (e.g. counseling appointments) were offered in any date range?
- Quality – how do students rate your services?

Example for output goal for counseling appointments:

- Goal was 100% appointments made within 2 days of asking: Per cent delivered: _____
- Number of appointments per month: _____
- Average attendee ratings on five-point scale: _____

Tips:

- Keep evaluations simple and easy to collect – if you over-design things it won't get done
- Start with a small sample – if very positive you can stop there, if not so positive you can dig deeper

Teamwork

I've written this paper with the idea that a small group within a career services department could get together and create a good quality strategic plan in one day.

A key element in the process is to understand that goal setting is the key:

- Start with a single broad outcome goal – what big benefit do you want to achieve? It should relate to your mission statement.
- Create a small number of key output goals that added together should achieve the outcome goal.
- Break each output goal into several action steps.

And that's it. Making all the goals *SMART* will force everyone on the team to be clear and assigning specific tasks to individuals with measurable expectations and deadlines will encourage good teamwork.

At the end of the day, write it up, review it and publish it.

Appendix

Two tips for making a good presentation.

Sell the problem

First, sell the problem and not the solution. Most put 10% of their energy into selling the problem and 90% into selling the solution to the problem. Decision makers aren't in the market for solutions to problems they don't see, acknowledge, and understand.

Provide sufficient information by using a briefing note template²

How is a Briefing Note structured?

The most important point to remember about the structure of briefing notes is that they have three main parts:

- the purpose (usually stated as the issue, topic, or purpose)
- a summary of the facts (what this section contains, and the headings used will be determined by the purpose of the briefing note)
- the conclusion (this may be a conclusion, a recommendation or other advice, or both)

These three main parts are presented under some or all the following section headings. Remember, any briefing note you write will only have the sections that are relevant to your purpose and audience.

Issue (also Topic, Purpose): A concise statement of the issue, proposal, or problem. This section should explain in one or two lines why the BN matters to the reader. It sets out in the form of a question or a statement what the rest of the note is about.

Background: The details the reader needs to understand what follows (how a situation arose, previous decisions/problems, actions leading up to the current situation). Typically, this section gives a brief summary of the history of the topic and other background information. What led up to this problem or issue? How has it evolved? Do not repeat information that you're including in the Current Status section.

Current Status: Describes only the current situation, who is involved, what is happening now, the current state of the matter, issue, situation, etc.

Conclusion and/or Recommendations: Conclusions summarize what you want your reader to infer from the BN. Many readers jump immediately to this section, so be sure it covers the points you most want your reader to be clear about. Do not introduce anything new in the Conclusion. If you are including a recommendations section, it should offer the best and most sound advice you can offer. Make sure the recommendation is clear, direct, and substantiated by the facts you have put forward.

² Adapted from: <http://web.uvic.ca/~sdoyle/E302/Notes/WritingBriefingNotes.html>

Typical One-Day Simplified Strategic Workshop Outline

08:30 – 09:30 Review the strategic plan model found on Page 4 so that your mission statement is put into context³

- List your input resources
 - People
 - Technology
 - Budgets
 - Etc.
- List your processes
 - Respond to student needs
 - Offer support for interviews, internships, resumes
 - Etc.
- List your current outputs or deliverables
 - Career fairs
 - Counseling/advising sessions
 - Responses to inquiries
 - Etc.
- Identify how you evaluate your outputs
 - Number of students/employers attending a career fair
 - Feedback from inquiries
 - Number of counseling/advising sessions delivered
 - Etc.
- List your outcomes
 - Short term: increased use as measured over last year’s baseline
 Increased quality of services delivered as measured by feedback forms
 - Medium term: increase in competencies as measured by feedback from employers
 increase in rates of employment of graduates
 - Long term: increase in general quality of life as measured by increased tax base
 that allows for better schools, public amenities like pools, etc. or
 reduced unemployment figures.

09:30 – 10:00 Create a one-sentence mission statement

10:00 – 10:15 Coffee/nutrition break

10:15 – 11:00 Perform a SWOT analysis

11:00 – 12:00 Identify the key issues to address, brainstorm options to address the issues, put up a messy set of flip-chart papers with the raw ideas and use sticky-dots for the team members to “vote” on the options they think are the best. Collate the messy data into a coherent set of three to five goals. Summarize the rough goal statements on a separate flipchart in preparation for the work after lunch.

³ This exercise summarizes your departmental efforts and brings the focus to your outcome measures. In the busy day-to-day grind it is easy to forget that processes and outputs are only worthwhile if they lead to outcomes.

- 12:00 – 13:00 Lunch
- 13:00 – 14:30 Allow team members to choose which of the goal statements interest them the most and divide the goal statements among these sub-teams. If you have a large team, each goal statement may have two or more team members working on it; if you have a small team, then each team may need to work on two or more goal statements.
- These teams will create SMART goals and SMART action steps for their goals, post their recommendations on flipcharts and prepare to present their recommendations to the other team members after coffee. Note: this is an ambitious time frame so don't word-smith the results to death. Keep to the time frames to maintain the momentum.
- 14:30 – 14:45 Coffee
- 14:45 – 15:45 Team presentations and discussion. Note: if you have five goal presentations, each one only has 12 minutes IN TOTAL, so be careful with your timing.
- 15:45 – 16:15 Assign tasks to individual team members following the template found on the bottom of Page 5.
- 16:15 – 16:30 Ask for feedback by going round robin and having everyone comment on how they found the day. End by scheduling a time to meet to review progress.

Questions?

Please don't hesitate to call for additional explanations or further tips on implementation.

Sincerely,



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