



STRATEGIC PLANNING WEBINAR

Strategies to Design + Launching your plan

September 25, 2019





1. In the chat: Share your name, role, and from where you are calling!
2. Throughout the session, feel free to add any questions as they come up.



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Agenda + Guiding Questions for our webinar

- What is the EE Approach to Strategic Planning?
- How do we prioritize what to focus on during the Design and Launch phases?
- How can we ensure our team works well together and incorporates more voices to move our strat plan forward?



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Education Elements Approach

Strategic Planning Process
Stakeholders Involved
Governance + Decision Making

HOW we engage in **strategic planning**
matters just as much as
WHAT is included in the strategic plan

Vision + Mission
Core Values
Focus Areas + Initiatives

Strategic Planning Process | The EE Approach



Plan + Align

Determine how your teams will **work together and engage stakeholders**

Foundations

Identify **opportunities for improvement and focus areas**

Design

Prototype **solutions and develop priorities**

Launch

Take steps to **launch initiatives and build accountability systems**

EACH PHASE CLARIFIES THE NEXT

Phases of a Strategic Planning Project



PLAN + ALIGN

FOUNDATIONS

DESIGN

LAUNCH

PHASE 1

Kickoff meeting,
define the theme
clear expectations;
Green light

PHASE 2

Identify focus
areas for your plan

PHASE 3

Prototype solutions
and develop
priorities

PHASE 4

Evaluate ongoing
successes and
tensions of the
project, **regularly
hold meetings,
report progress, and
adjust**

Traditional vs. Responsive Operating System



How might we prevent cars from hitting each other in an intersection, while maintaining the maximum flow of traffic?



*Both are viable solutions. So, how are they different? What are the **assumptions behind** each of these solutions?*

Traditional vs. Responsive Operating System



How might we prevent cars from hitting each other in an intersection, while maintaining the maximum flow of traffic?



Assumption #1: People need to be *told what to do* (red, yellow, green light)

Assumption #2: Problems *need to be managed* with rules and complex tech

Assumption #3: Plan for every possible scenario (multicolored signals, arrows, flashing lights, etc.)

*Both are viable solutions. So, how are they different? What are the **assumptions behind** each of these solutions?*

Traditional vs. Responsive Operating System



How might we prevent cars from hitting each other in an intersection, while maintaining the maximum flow of traffic?

Assumption #1: *People can be trusted* and will use their judgment to do the right thing.

Assumption #2: Problems *can be managed with simple rules and agreements* (right of way)

Assumption #3: Many scenarios will occur, but protocols *will be sufficient* to handle them



*Both are viable solutions. So, how are they different? What are the **assumptions behind** each of these solutions?*

Traditional vs. Responsive Operating System



How might we prevent cars from hitting each other in an intersection, while maintaining the maximum flow of traffic?

311,000 signals in United States



1118 intersections in United States

Reduce injury collisions by 75% and fatal collisions by 90%

89% reduction in delays

\$5-10K cheaper to maintain each year

Works during power outages

So which one is better?



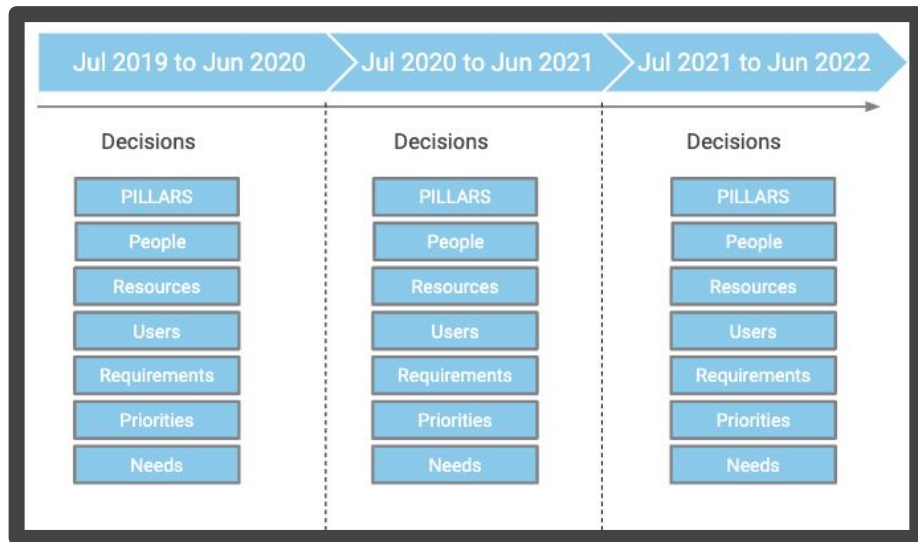
In the chat

What elements of your current strategic plan are **stop lights** vs. **roundabouts**? Is your plan more like one or the other?

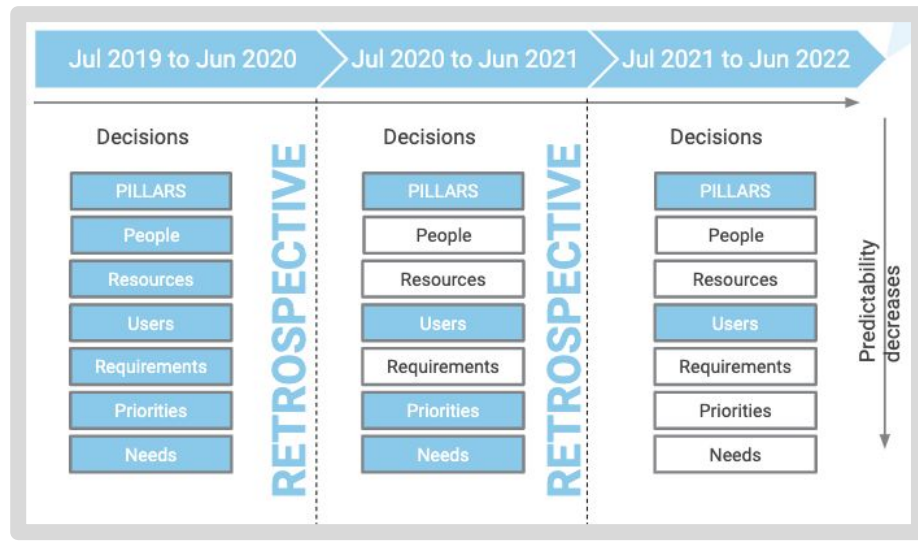
Responsive Planning



Traditional



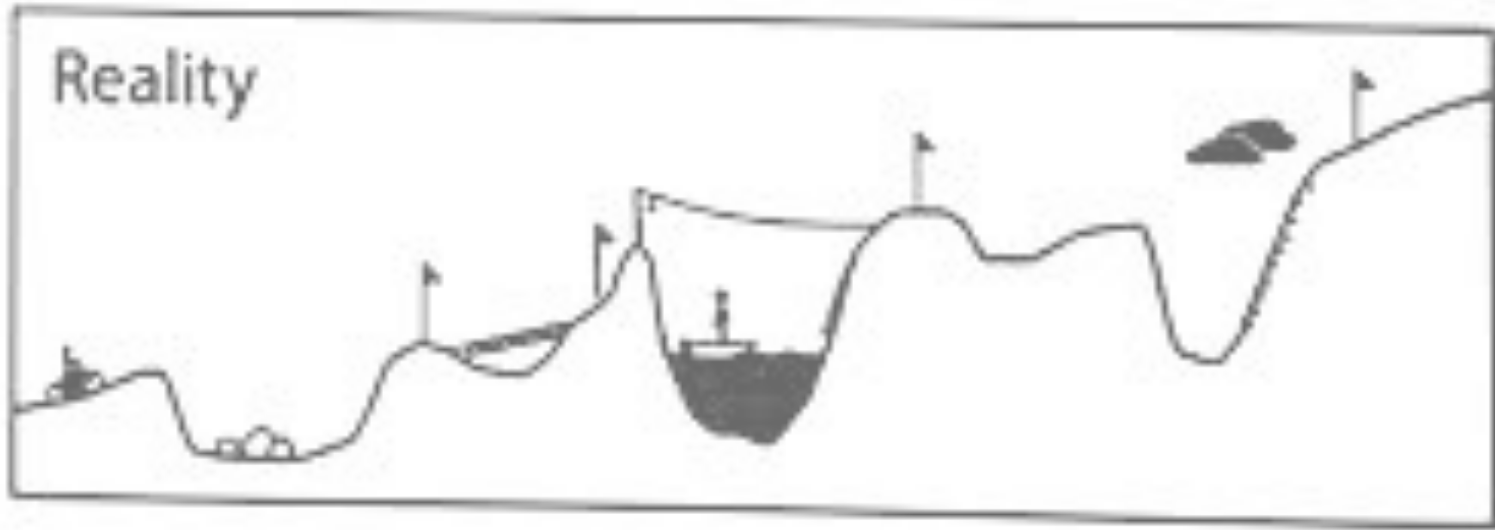
Responsive



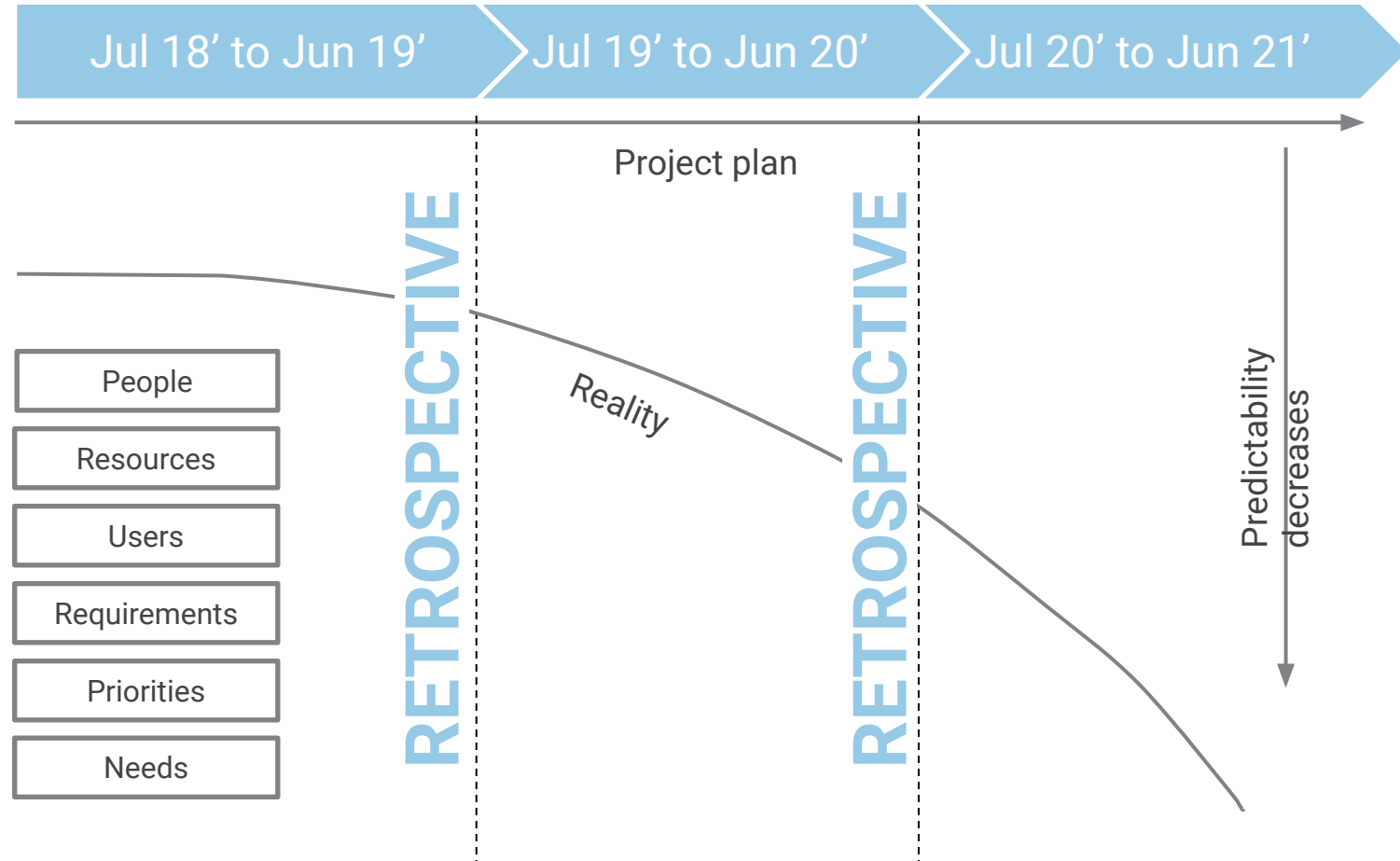
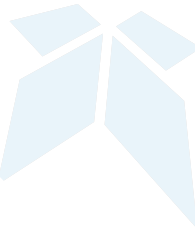
How we think about planning...



Planning in real life...



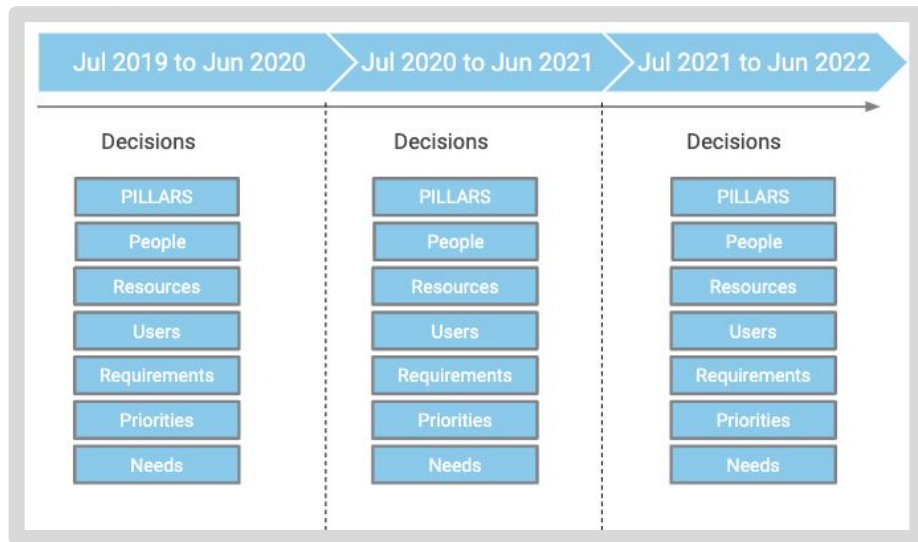
Responsive Planning



Responsive Planning



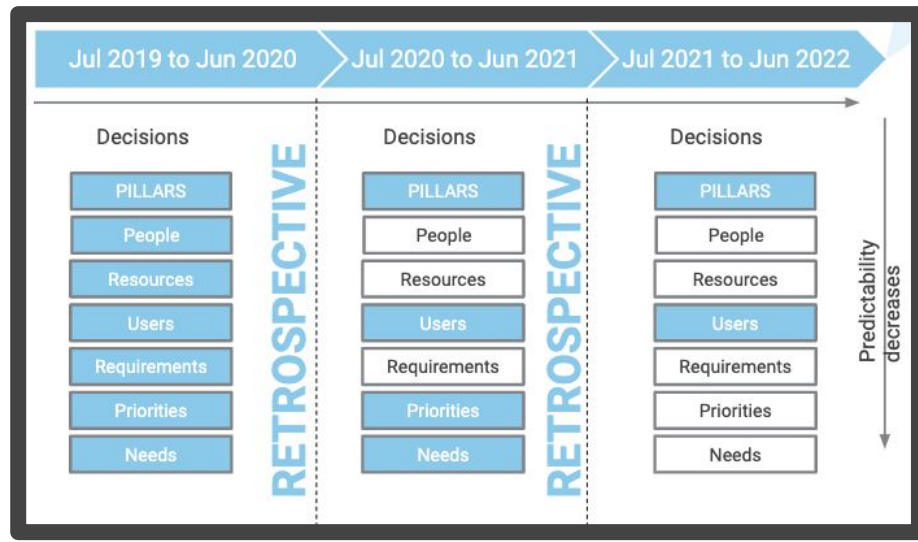
Traditional



STOP LIGHT PLAN



Responsive



ROUNDABOUT PLAN



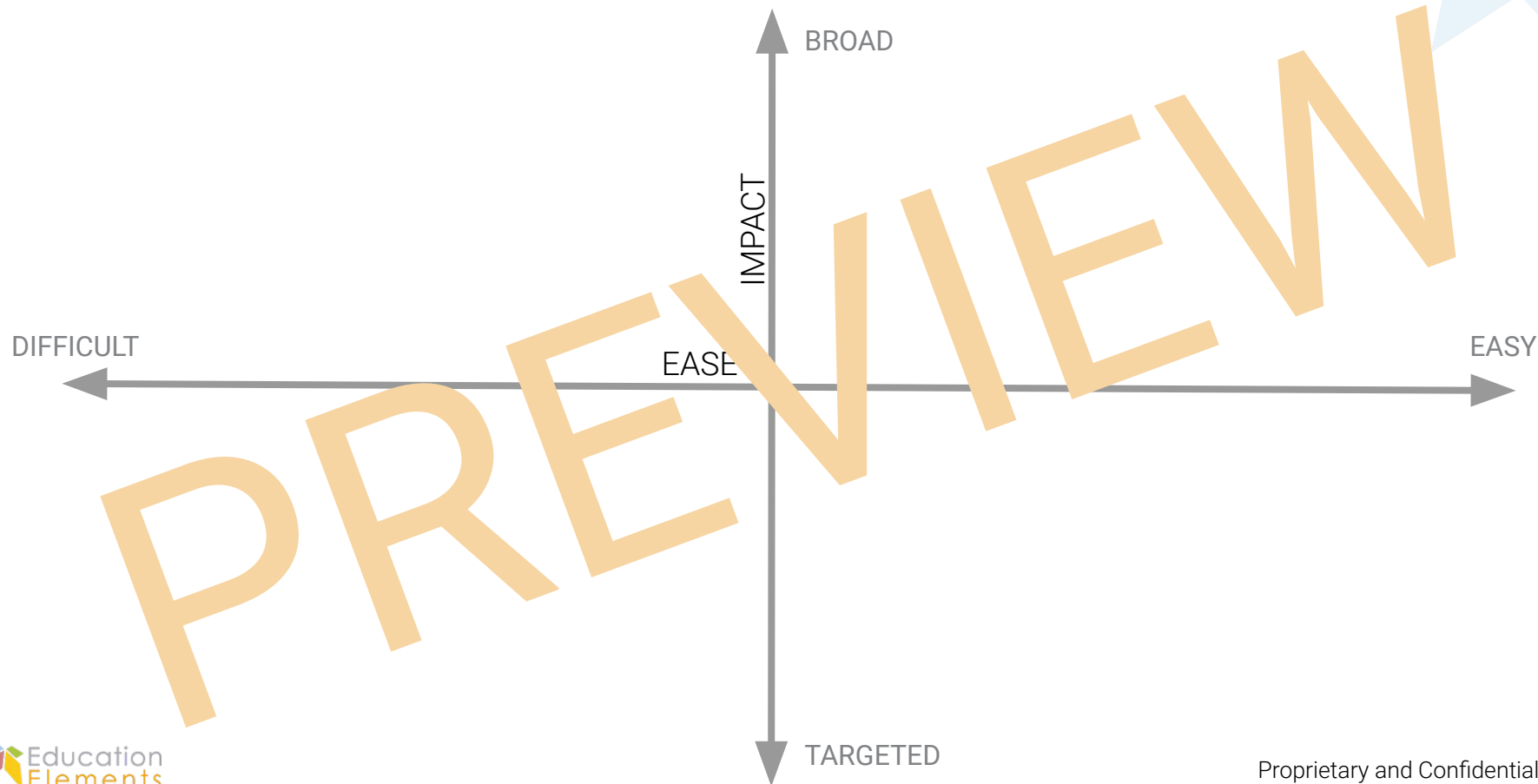
Agenda + Guiding Questions for our webinar

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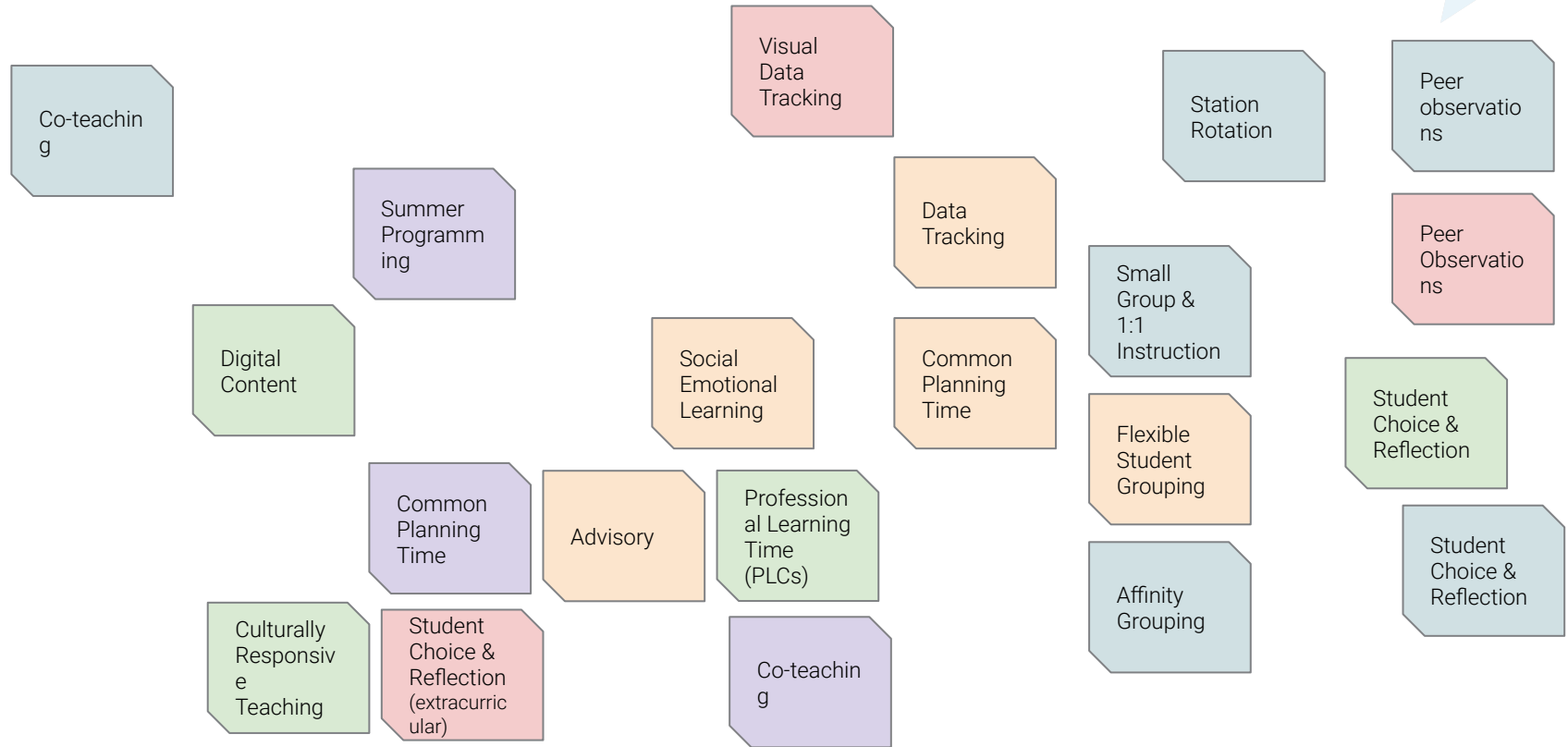


Of the focus areas
...that we are most interested in starting...
we will prioritize based on
IMPACT & EASE

Prioritization Matrix



STEP 1 | Make a list of all of your strategic planning focus areas





In the chat

How would you
define the term **IMPACT**?



Important to replicate this activity
with your strategic planning team. **IMPACT**
can be estimated or perceived.



- Strategic Alignment: How will this initiative **support a variety** of strategic priorities?
- Student Impact: How might this initiative **directly drive outcomes** with our students?
- Return on Investment: How will this initiative **provide benefits beyond** those directly impacted?
- Flexibility: Are we **able to adjust** our course with new information?

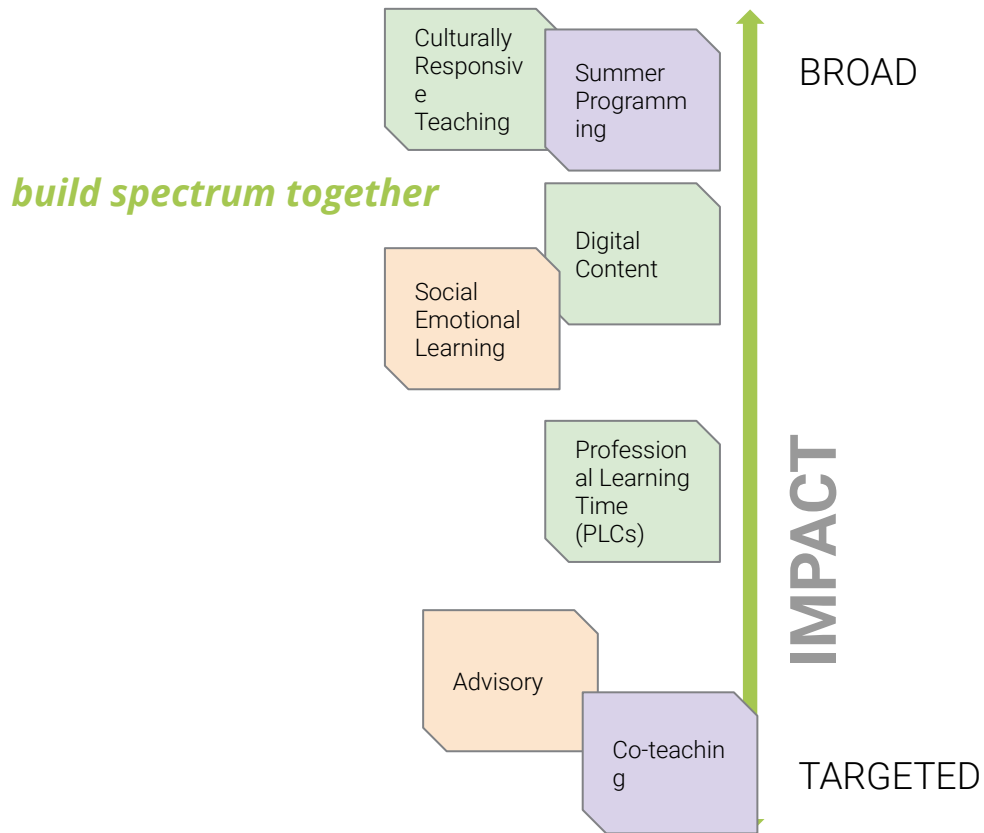
Step 3 | Determine Impact



build spectrum together



Step 3 | Determine Impact





In the chat

How would you
define **EASE** of implementation?



Important to replicate this activity with your strategic planning team. **EASE** can be estimated or perceived.

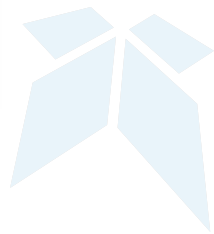
What is it?

What is it not?



- Feasibility: How do our **existing structures support** this initiative?
- Risk: How certain are we in our **ability to implement** this initiative?
- Resource Availability + Support: Does our staff have the **capabilities necessary to accomplish** this initiative?
- Cost: How will this initiative impact our bottom line and can we **absorb the budget** projections?

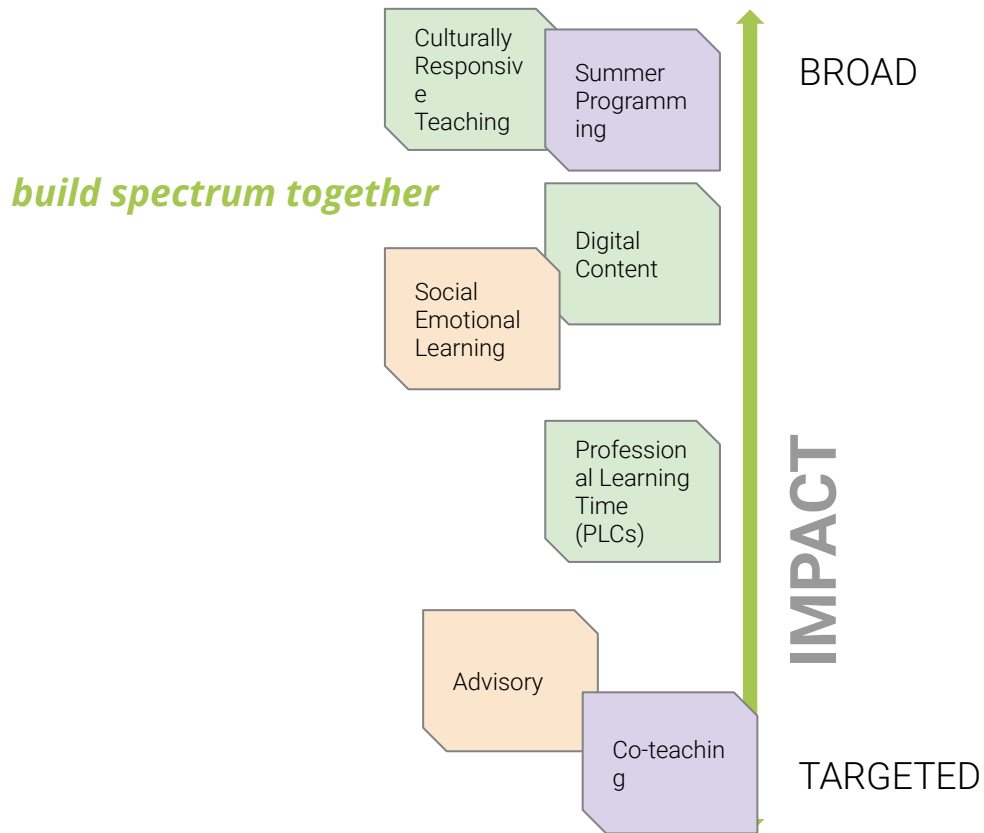
STEP 5 | Determine Ease



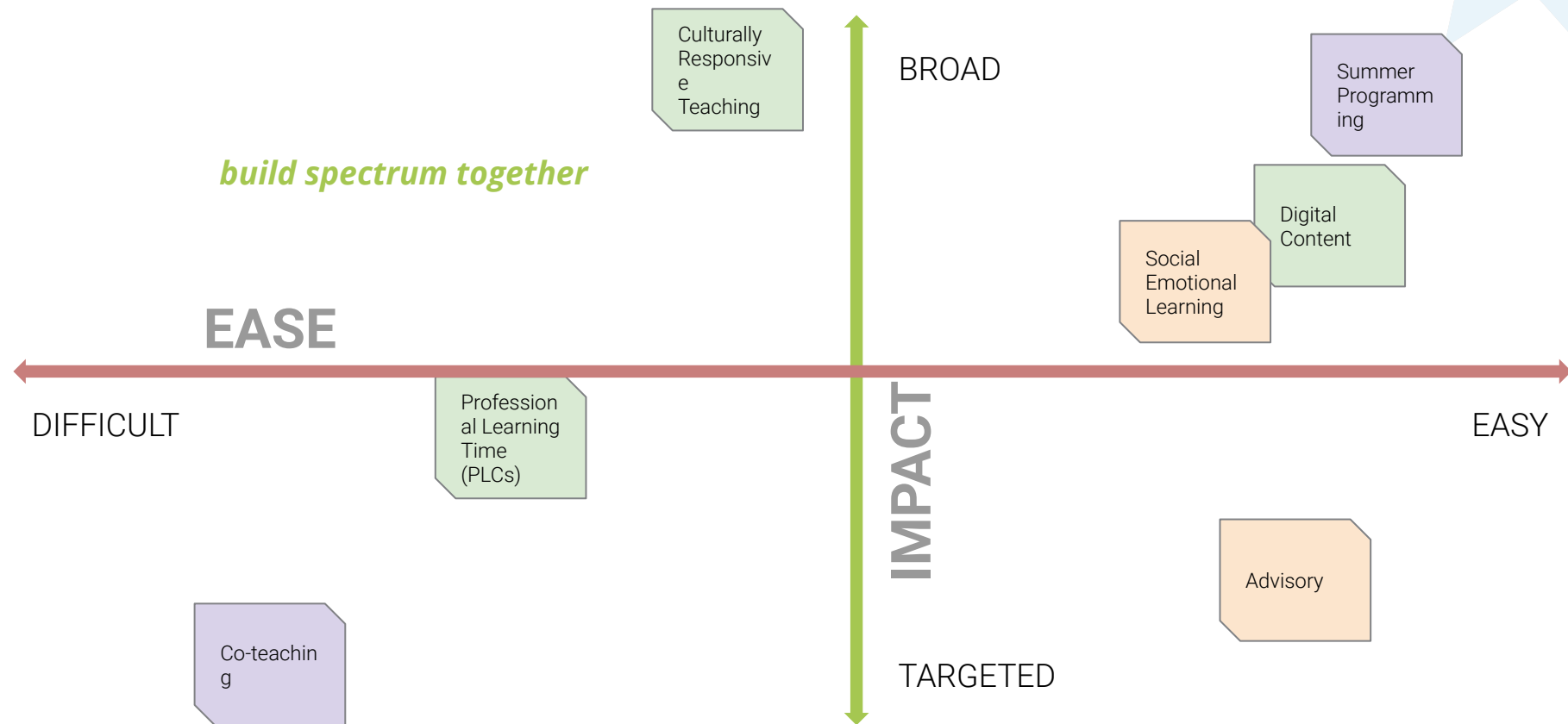
build spectrum together



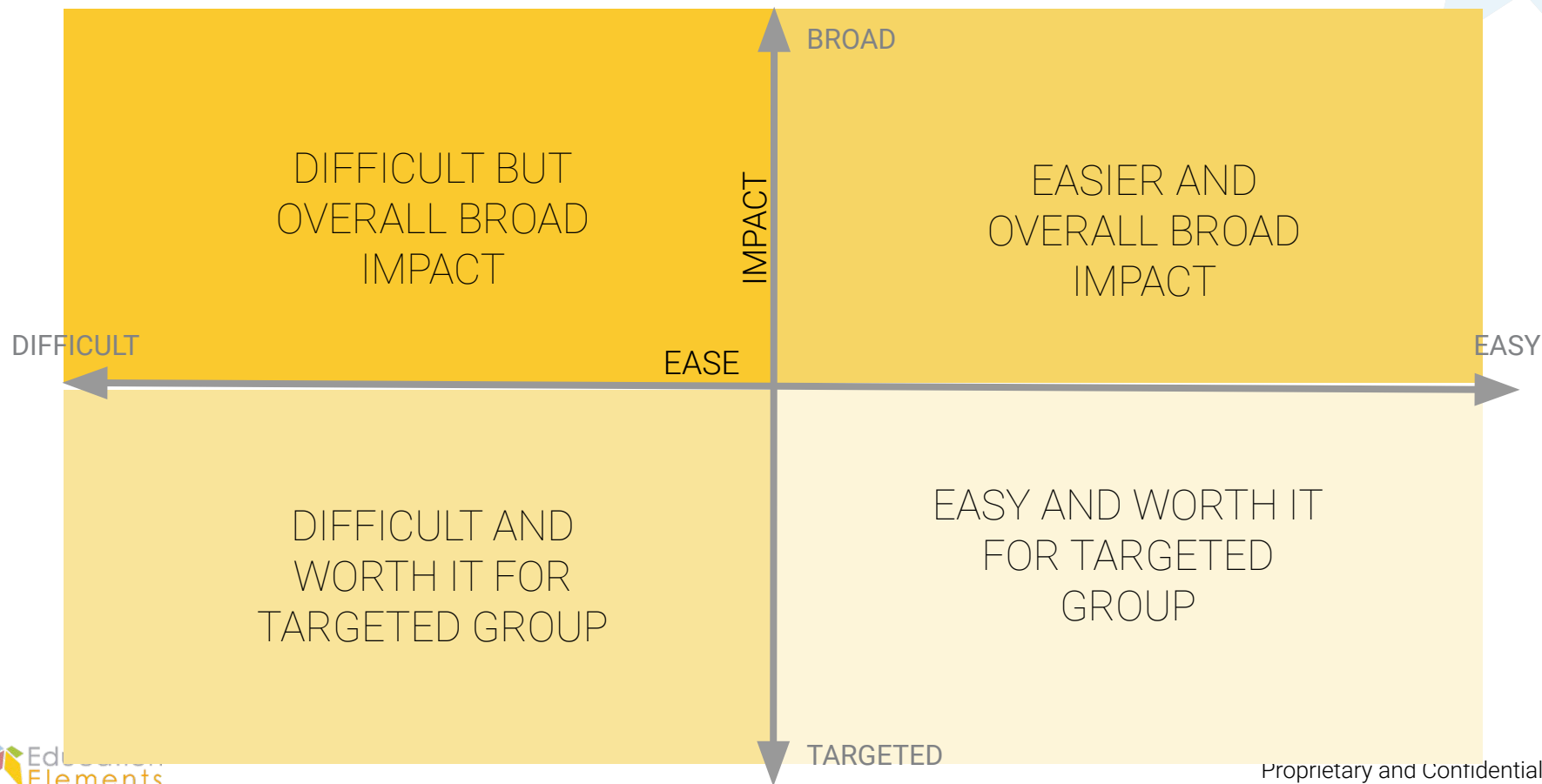
STEP 5 | Determine Ease



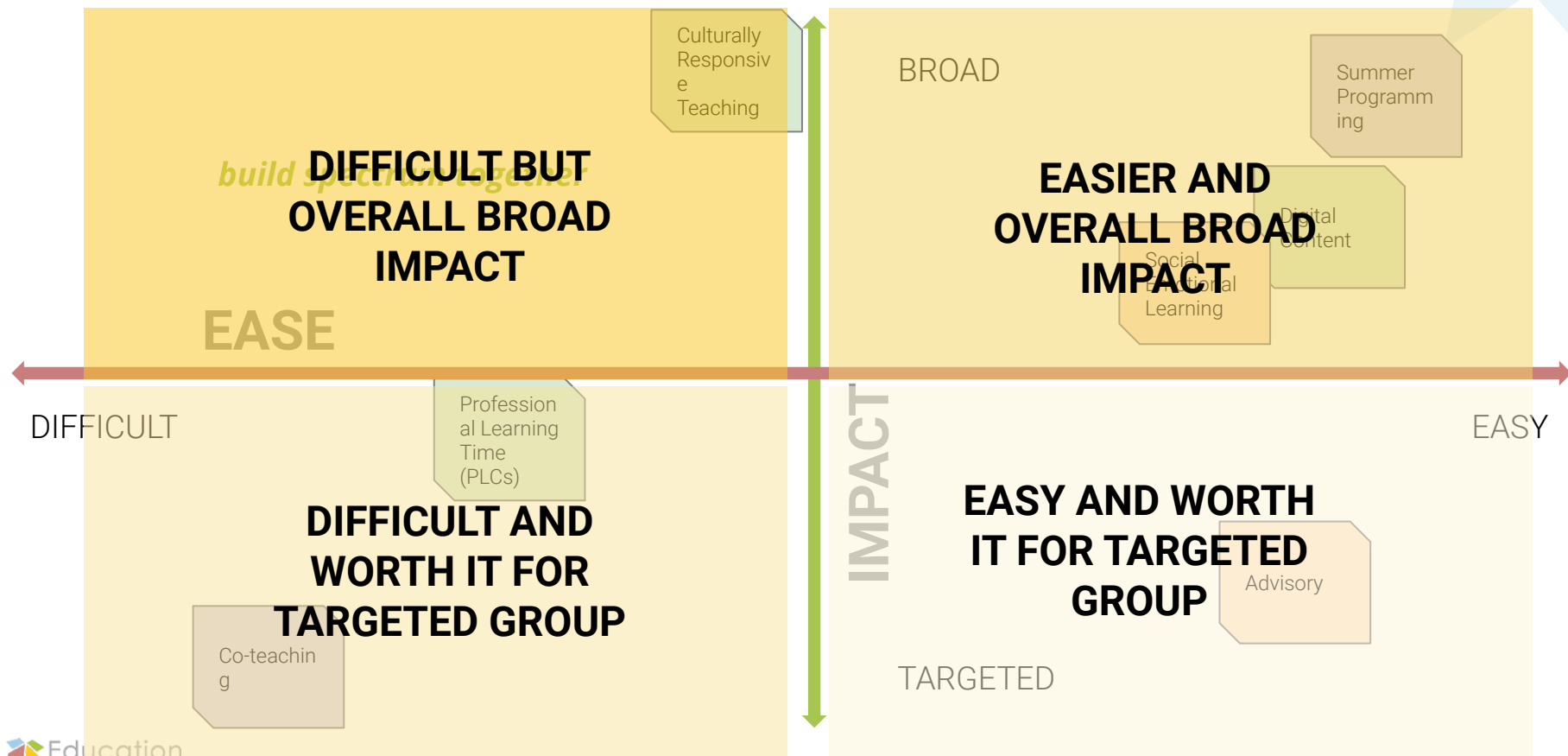
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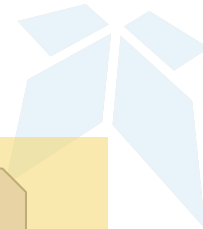
STEP 6 | Review final Prioritization Matrix



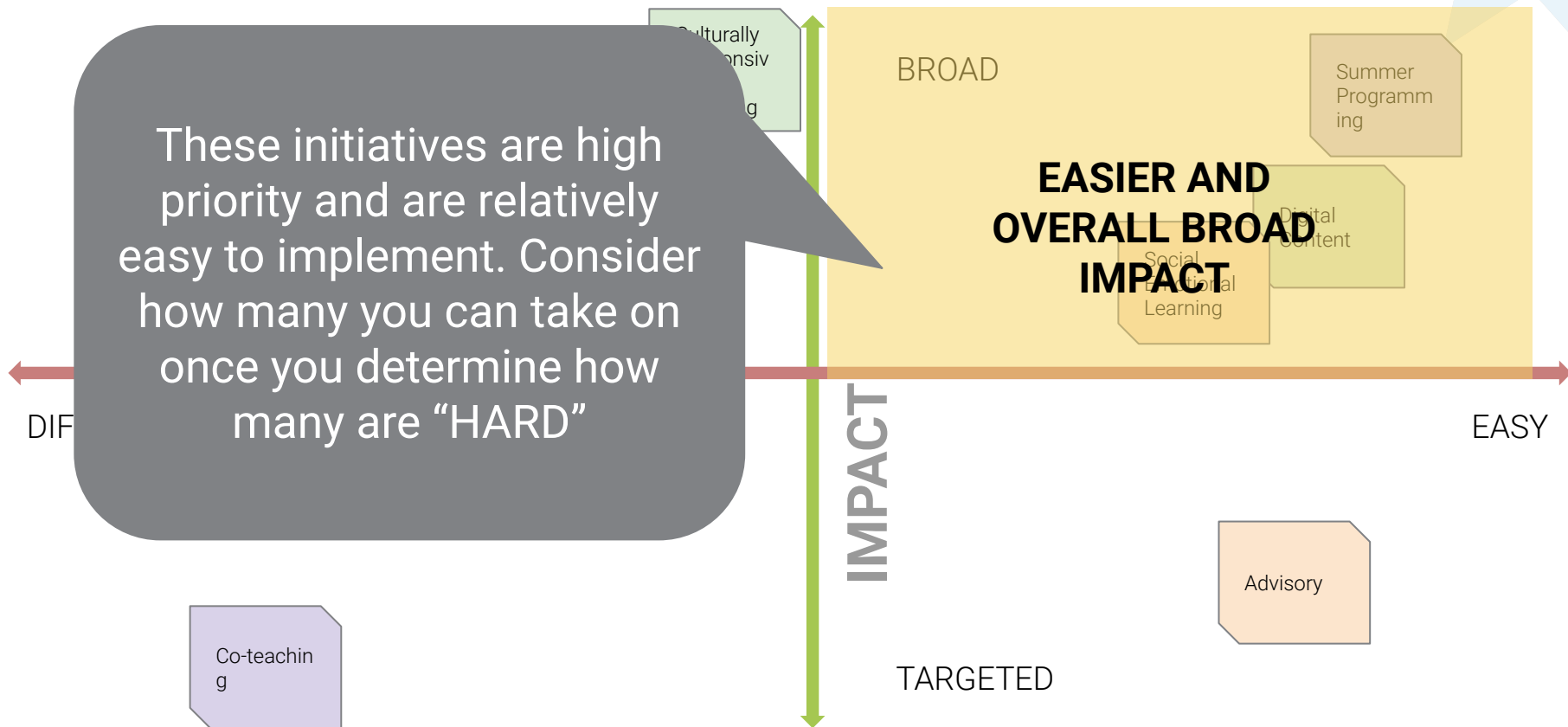
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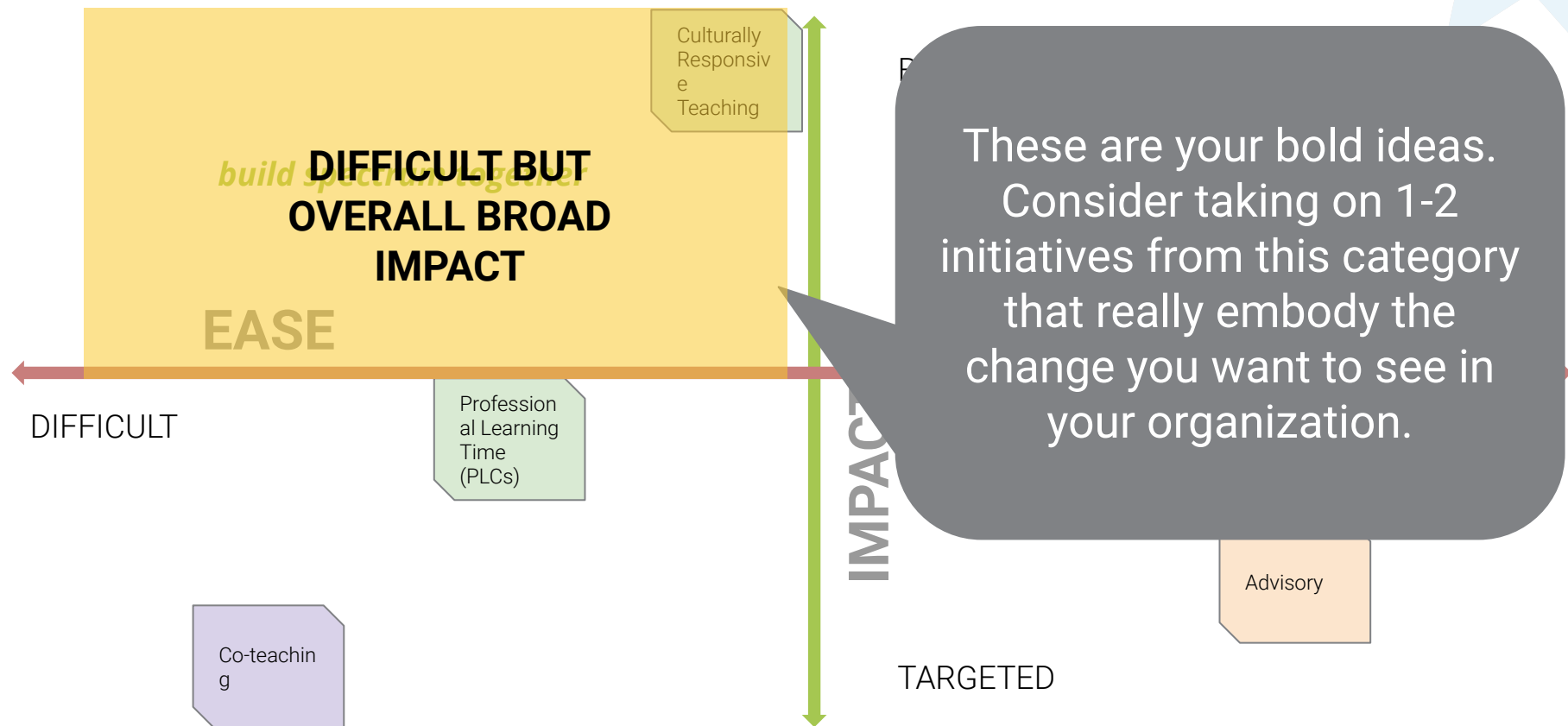
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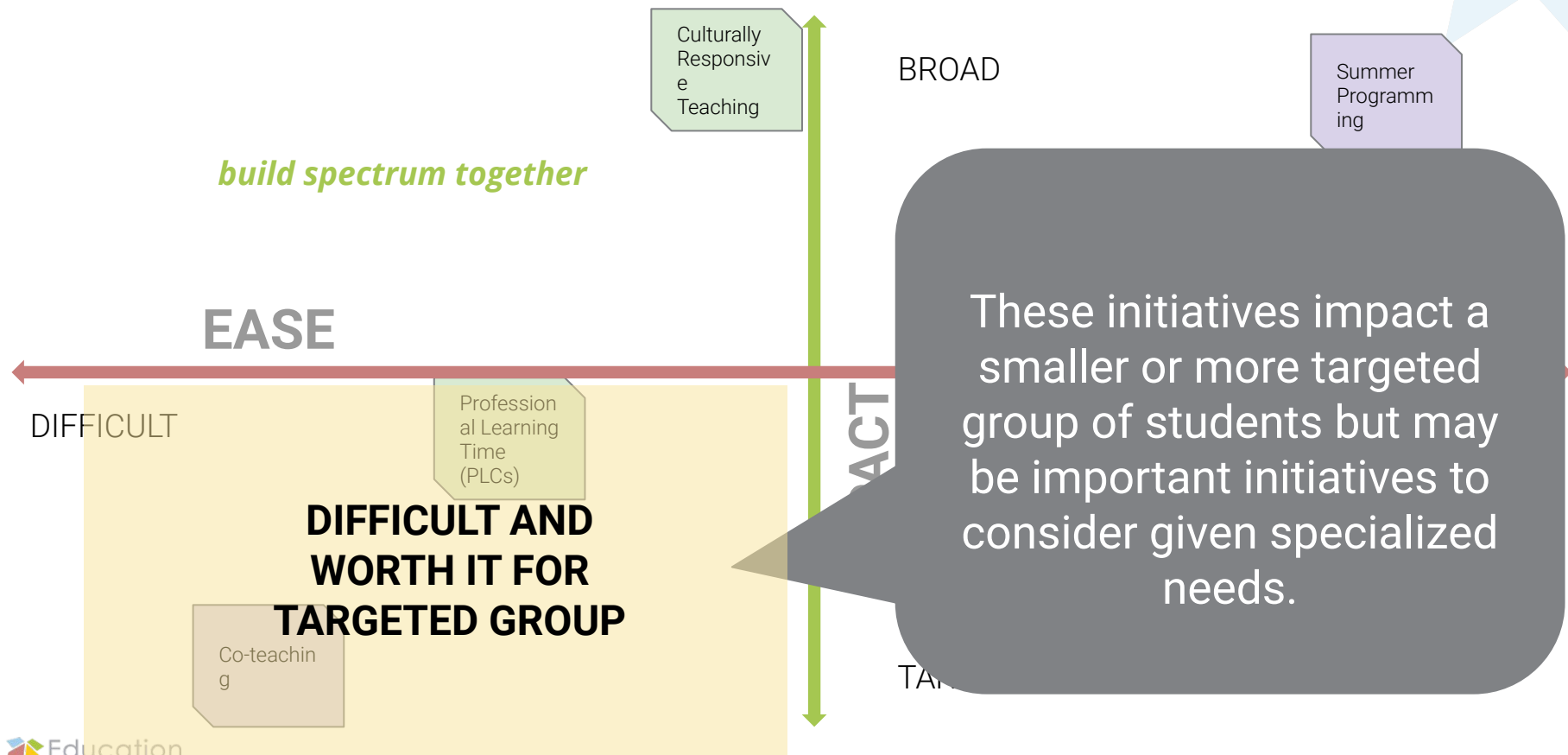
These initiatives are high priority and are relatively easy to implement. Consider how many you can take on once you determine how many are “HARD”



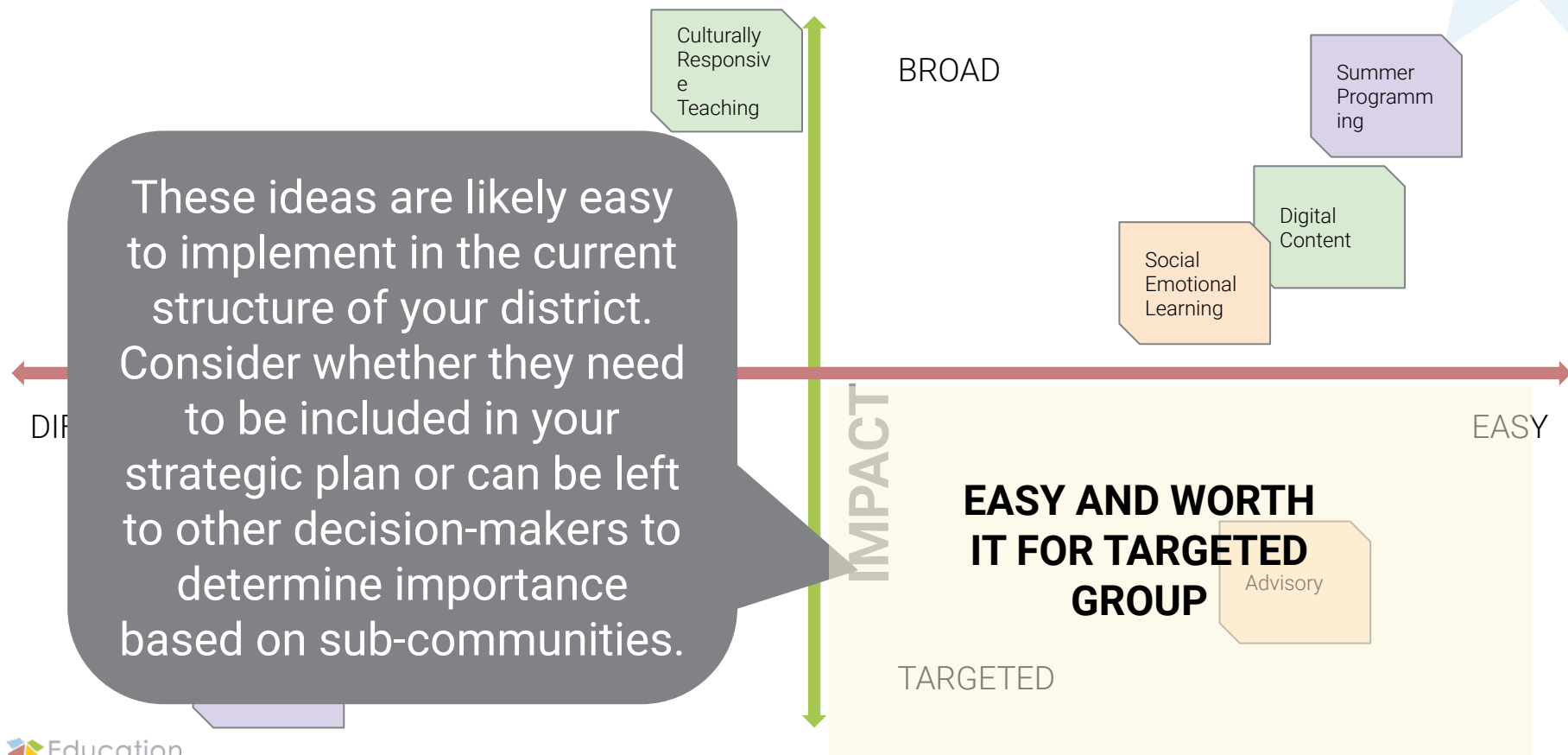
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STEP 6 | Review final Prioritization Matrix



Recap



STEP 1 | Make a list of all of your strategic planning focus areas

STEP 2 | Define **IMPACT** with your team

STEP 3 | Determine Impact

STEP 4 | Define **EASE** with your team

STEP 5 | Determine Ease

STEP 6 | Review final Prioritization Matrix + select 2-3 focus areas to prioritize in that cycle



In the chat:

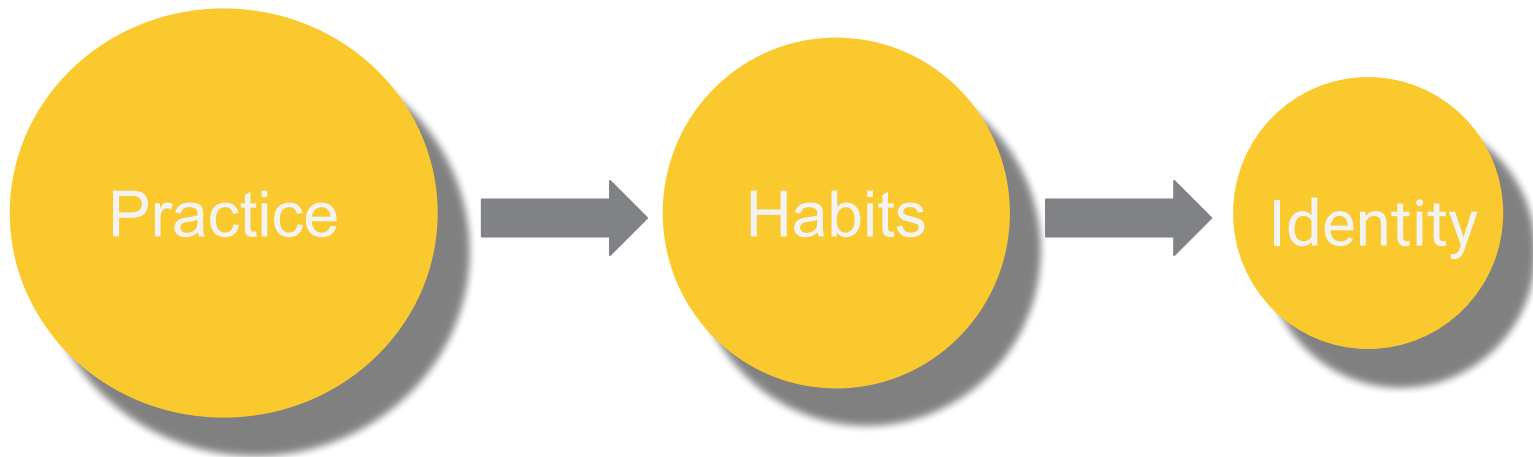
What questions do you have?



Agenda + Guiding Questions for our webinar

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How can incorporate more voices?



A practice we can start in
2 min and practice
frequently is...

*EVERY STRAT PLANNING
MEETING STARTS WITH
EVERYONE CHECKING IN*

A habit we need to
establish is...

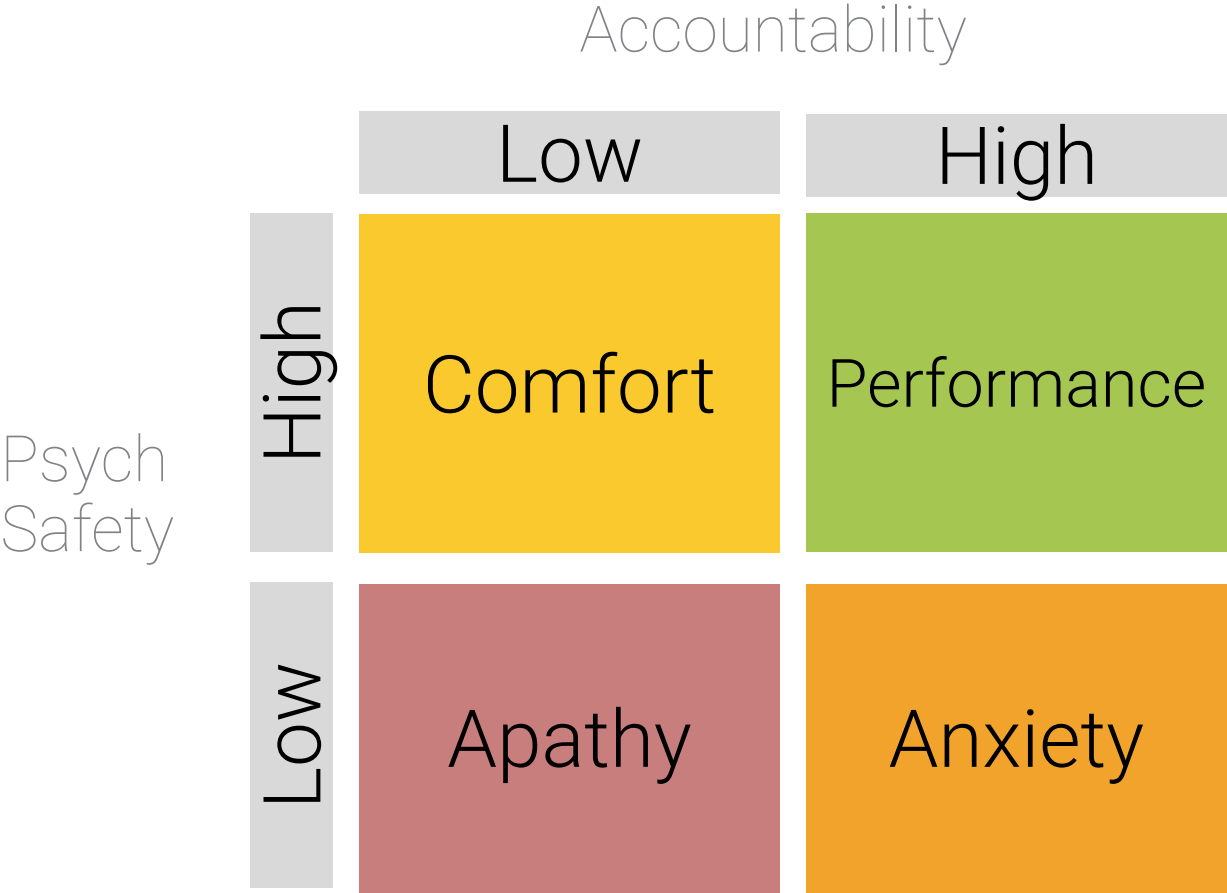
*EQUALITY IN
CONVERSATION*









Strategic planning
team is....

COLLABORATIVE

“Psychological safety is a belief that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes.”

-Amy Edmondson



CHECK IN Q'S		CHECK OUT Q'S	
	WHAT IS OCCUPYING YOUR MIND AS WE START THIS MEETING?		WHAT SOUND REPRESENTS HOW YOU ARE FEELING AT THE END OF OUR MEETING?
	ON A SCALE OF 1 TO 5, HOW ARE YOU FEELING COMING INTO THIS MEETING?		ON A SCALE OF 1 TO 5, HOW USEFUL WAS OUR MEETING?
	WHAT COLOR REPRESENTS HOW YOU ARE FEELING RIGHT NOW?		WHAT SONG REPRESENTS HOW YOU ARE FEELING AT THE END OF OUR MEETING?
	WHAT'S BEEN THE HIGH AND LOW POINT OF YOUR DAY/WEEK?		SHARE ONE IDEA SPARKED AND ONE SHIFT YOU WANT TO MAKE TO YOUR PRACTICE.

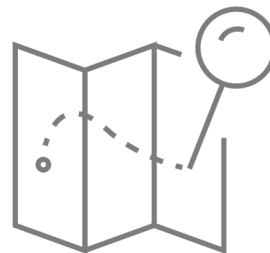
Looking for more ideas? Visit these websites:

- Check In Questions: bit.ly/checkinquestions1
- Icebreaker Questions: bit.ly/icebreakerquestions1
- Circle Way Questions: bit.ly/checkinquestions2



EXPAND

Strategic Planning Webinar
#3: Institute Recap
October 29 - 5pm ET



PLAN

1-1 Coaching Call to
discuss your next steps



STRATEGIC PLAN TOOLKIT + TRAINING

Do you have a team dedicated to lead your own strategic planning process?

This support package provides access to tools and trainings to effectively design and launch your own strategic plan.

Plan & Align*

Foundations*

Design & Launch*

Support, Reflect, Iterate

STRATEGIC PLAN CUSTOM DESIGN

Do you want a partner to support your team in creating a customized strategic plan?

This support package provides comprehensive support to design and launch a community-driven strategic plan.

Plan & Align

Foundations

Design & Launch

Support, Reflect, Iterate

STRATEGIC PLAN CUSTOM ADD ONS

Do you need support leading community sessions?

Community Town Hall
Facilitation

Do you need help visualizing your strategic plan?

Graphic Design

Plan & Align

Foundations

Design & Launch

Support, Reflect, Iterate

STRATEGIC PLAN PULSE CHECK

Do you seek better visibility into the status of your current strategic plan?

This support package will help you to prioritize focus areas to improve implementation.

Plan & Align

Foundations

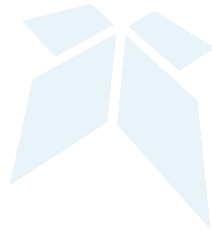
Design & Launch

Support, Reflect, Iterate



1. In the chat: What is one takeaway you had during this webinar?
2. Any other questions?

Appendix



FIVE TYPES OF MEETINGS

MENTOR	INFO	TACTICAL	STRATEGY	GOVERNANCE
1-1 or small group meetings focused on learning and development	Project, team, or org-wide “status” meetings focused on sharing info about the work being done	Project or team meetings focused on moving the work forward	Project or team meetings focused on doing the work (analyzing, planning, brainstorming, etc.)	Meetings that set the policy that will guide current and future work

Meetings are working when they are..

- Inclusive - every attendee has a voice
- A Shared Experience- everyone has an active role and is contributing
- Responsive- the meeting structure evolves based on needs of team

TACTICAL MEETING AGENDA

- 1) **CHECK IN**- short, get present, sacred space for each person to share
- 2) **METRICS** - (“CHECKLIST” OR STATUS UPDATES)
check/no check on actions from last meetings, regular data, and projects
- 3) **BUILD AGENDA** - build on the fly in a shared space, should include 2-3 words and agenda owner’s name
- 4) **PROCESS AGENDA** - use protocol to process agenda items efficiently with the agenda owner
- 5) **CHECK OUT** - short, feedback on meeting, sacred space for each person to share

HOW TO FACILITATE THROUGH AGENDA

1. After the agenda has been built, the facilitator moves the group through agenda items using this simple structure.

<u>A</u>	<u>B</u>	<u>C</u>	<u>D</u>
Facilitator asks: "What do you need?"	Agenda item owner engages others as needed	Facilitator asks: "Did you get what you needed?"	Secretary captures notes and next steps

2. When the facilitator asks, "what do you need?" the agenda item owner might respond using one of the frames featured in the right info box.
3. It is the facilitator's responsibility to continually refocus on the agenda item owner. If they haven't gotten what they need, the facilitator should continue clarifying needs. If they have gotten what they need, the facilitator should synthesize the decision or action (for the secretary to capture) and move on to the next agenda item.
4. This should continue until all agenda items have been processed or the meeting has five minutes left (to allow time for check outs).
5. Before the next meeting all agenda items should be erased so that the group can start with a blank slate to build the agenda on the fly again based on real time needs.

WHAT DO YOU NEED?



REQUEST AN ACTION

I need someone to take a specific action



REQUEST INFORMATION

I need an update on a specific project



SHARE INFORMATION

I need to share information with the group



REQUEST ADVICE

I would like to hear opinions and advice