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Strategic Planning - Stop the Madness!

Presenters

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Corporate Partners



Session Takeaways

- Understand what strategic planning is and isn't
- Why do strategic planning
- Case Study: Jeffco
 - Why they did strategic planning
 - What their process was
 - The results
 - Identify obstacles and opportunities
- Q/A
- Resources



Wikipedia: What is Strategic Planning?

- 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.



Strategic Planning Inputs

Data is gathered from a variety of sources

- Interviews, surveys or focus sessions with key stakeholders
- Review of the competition or market
 - Other districts successes
 - Participation of similar districts
 - Visiting or observing other districts or food services
 - Industry studies, etc.



Strategic Planning Inputs

- Other inputs include an understanding of the values of key stakeholders
 - The school board
 - Superintendent
 - Senior management
 - Parents in community
- These values may be captured in an organization's vision and mission statements



Strategic Planning Outputs

- Documentation and communication describing -
 - Vision
 - Mission
 - Goals
- The Strategic Plan may cover multiple years
- The department will want to measure and monitor progress towards objectives.



Case Study: Jeffco

Why Strategic Planning in Jeffco?

1. Listen and Seek to Understand
2. Absorb Culture
3. Reflect and Identify Themes:
 - Areas for Immediate Impact
 - Areas for Future Growth



Involve Team in Strategic Planning / Roadmap



Case Study: Jeffco

“Pie Chart”



vs.

“Steering Wheel”



Case Study: Jeffco

Navigating the Strategic Planning Process:

1. Provides a Team Identity/Brand
2. Critical to have:
 - Map of where we are going
 - How we are spending our money
 - Where we are investing our time
3. Leadership for the Department/Team
 - Vision and goals
 - Prepare to shift strategies when necessary



Case Study: Jeffco

Our “Must Haves”:

- Involve all levels of organization
- Inclusive and accepting atmosphere
 - All ideas and criticisms welcome
- Neutral location
 - Distractions removed and comfortable conditions



Case Study: Jeffco

Our “Must Haves” (continued):

- Neutral outside party to facilitate
 - Someone familiar with our industry is key
- Adequate time
 - 2 day retreat-style would be ideal
- SWOT Analysis
- A **full, finished product**



Case Study: Jeffco

1. Prior to Strategic Planning:

- Determine procurement requirements

2. Prior to Event:

- Conference with facilitators
- Pre-survey of participants
- Confirm event location
- Make arrangements for your desired environment



Case Study: Jeffco

3. During Event:

- Event Norms/Ground Rules
 - All voices are heard / no dominating voices
 - Maintain engagement
- Identify Gaps / Areas of Opportunity
- Dream of “What could be?” and “Who we want to be”
- Translate to tangible, realistic takeaways



Case Study: Jeffco

Results

- Mission
- Vision
- Core Values
- Identified areas for goal development



Case Study: Jeffco

Facilitators' Follow Up:

- Post-survey of participants
- Analysis and summarization
- Report of findings
- Strategies for moving forward
 - Goal setting
 - Context for decision-making



Case Study: Jeffco

Jeffco's Follow Up:

- Review report from facilitators
- Share results with:
 - Strategic planning participants
 - Entire department
 - Division Lead (COO in Jeffco)
- Prioritize next steps
- Budget for next steps
- Implement next steps



Case Study: Jeffco

Obstacles and Opportunities

- Time
 - Would have benefitted from a 2nd day for goal setting and fully-developed strategies
- Ownership
 - Key person identified for next steps
 - Limited staff and resources
- Timelines & Accountability
 - Should have been furthered developed by Jeffco
 - Realistic expectations for progress



Case Study: Jeffco

Discussion



ProTeam's Reminders

- No one program, or one director will be great at all things
- Lean in to your strengths
- Seek out subject matter experts in other areas
- Don't tackle everything – build a plan with a reasonable time frame
- Expect you'll always have a list of things to accomplish and it will never be done 😊



THANK YOU!

CO SNA 2019 Annual Conference

