



Building Skills for Parent Training Center Leaders

Strategic Planning for Your Parent Training Center

*Strategies for Designing and Sustaining
Your Center's Future*

Session Handouts

Jeffrey L. Russell



Jeff Russell, co-director of **Russell Consulting, Inc. (RCI)** with his wife Linda, specializes in helping leaders build productive, supportive, and motivating work environments. RCI helps companies develop their leadership and strengthen team performance to achieve their great performance goals and outcomes. By guiding the

exploration of key values held in common by organizational members and developing strategies and actions to express these values-in-action, RCI helps organizations achieve their strategic vision.

Through processes that include "visioning" retreats, Future Search conferences, process redesigns, improving decision making processes, implementing quality improvement strategies, and providing a variety of skill-building seminars, RCI enhances long-term organizational effectiveness and performance.

Consulting Expertise

Jeff consults with companies in the areas of:

- Visioning and strategic planning
- Leadership development
- Leading and implementing change
- Performance management systems
- Employee engagement assessment
- Customer and employee focus groups
- Team assessment and intervention
- training needs assessment
- Organizational design
- Self-managed teams
- Problem solving and decision making

Training Expertise

Jeff conducts an array of leadership and team development seminars on such topics as:

- Surviving difficult conversations
- Fearless performance reviews
- Leadership and strategic thinking/planning
- Leading fearless change
- Communication skills
- Dealing with difficult people
- DiSC Behavioral Profiles
- 360 leadership assessment and development
- Effective meeting management

- Decision making and problem solving
- Managing conflict and win/win negotiations
- Performance management and coaching skills
- Team building fundamentals
- Team leadership and facilitation skills
- Customer service

Professional Background

Jeff serves as an adjunct faculty member at University of Wisconsin-Madison and UW-Milwaukee. He also teaches for the UW-Madison, UW-Eau Claire, and UW-La Crosse Small Business Development Centers.

Jeff has a bachelor's in Humanism and Cultural Change and a Masters of Science degree in Industrial Relations from UW-Madison.

Before forming RCI, Jeff served as human resource coordinator for the Wisconsin Department of Administration (DOA). At DOA, Jeff developed and coordinated their employee assistance, leadership and employee development, and equal employment opportunity/affirmative action programs.

Jeff is a past president of the Board of Directors for the Greater Madison Area Society for Human Resource Management serving over 800 HR professionals in the Greater Madison area.

Conference Presenter and Author

Jeff is a sought-after speaker at state, national and international conferences. Recent presentations include:

- ♦ ASTD International Conferences — 2001 through 2011
- ♦ Jamaica Employer's Federation Conference, Ocho Rios, Jamaica, 2004, 2006, 2007, 2009
- ♦ 2005 Minnesota Quality Conference
- ♦ Minnesota Project Management Institute, PDD 2007, 2008, 2009, 2011, 2012, 2013, 2014, 2015, 2016, 2017
- ♦ Wisconsin SHRM Annual Conference, 2004 through 2007, 2010, 2011, 2012, 2013, 2016, 2017, 2018
- ♦ Wisconsin Child Welfare Annual Conference, 2012
- ♦ *Leading Change*, Shanghai, China
- ♦ *Emotional Intelligence in Action*, Kuala Lumpur, Malaysia, 2012
- ♦ *Performance Management Summit*, Talent Management Alliance, Atlanta, GA, 2018

Jeff and his wife Linda have co-authored nine management books including **Leading Change Training**, **Strategic Planning Training**, **Change Basics**, **Strategic Planning 101**, **Ultimate Performance Management**, and **Fearless Performance Reviews** (McGraw-Hill, 2014).

Helping Create and Sustain GREAT Organizations!

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Organizational Longevity

Breakout Room – Organizational Longevity

In your breakout room:

1. Share your GPS coordinates: introduce yourselves to each other: name, role, Center, etc. (3 minutes)
2. Designate a reporter for your group.
3. Share the areas **Organizational Longevity** where our Centers are strong. Are there some common areas where we're doing well?

4. Share the areas where our Centers need to improve. Are there some common areas where we're not doing as well?

Be prepared to report out these common strengths and areas where our Centers need to improve.

You have about 10 minutes.

Strategic Planning for Your Center

Designing and Sustaining Your Center's Future

Helping Parent Training Center leaders, managers, and staff understand the importance of strategic planning, the value of following a thoughtful process, and how to initiate a strategic planning process. Participants will leave these two sessions with a plan for developing a strategic plan for their Center.

Learning Objectives

As a result of attending these sessions, participants will be able to build a critical level of strategic thinking in all employees and apply tools to build a strategic plan for their Center.

Part 1

- Discuss the fallacies of strategic planning and what actually works to enable your Center's sustainability over time.
- Describe what strategic planning is, the key components of a plan, and the role that strategic planning plays in enabling long-term organizational success.
- Explore how *strategic thinking* is different from strategic planning and why strategic thinking may be more critical to your Center's success than strategic planning.
- Identify the characteristics that enable someone to be a strategic thinker.

Part 2

- Apply a strategic thinking framework to guide your Center's board, leaders and frontline employees in making strategic decisions and taking appropriate actions every day in response to emerging challenges and opportunities.
- Discuss the levels of thinking, acting, and planning in organizations, what percent of time those attending this webinar spend at each level, and how to find the best percentage for each level.
- Identify the four stages for building a strategic plan.
- Learn how to create a shared vision and conduct a SWOT analysis.
- Examine common barriers to successfully implementing a strategic plan.

Your Learning Objectives

What is your learning objective for this course? What is one question that you hope we answer by the conclusion of this two-part learning program?

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Seminar Agenda

Today's Session

- ❑ Organizational Longevity – What it really takes!
- ❑ What is strategic planning and what are its components?
- ❑ What is strategic thinking?
- ❑ The levels of thinking/planning/acting in organizations.

Next Week's Session

- ❑ The stages of the strategic planning process.
- ❑ Creating a shared vision.
- ❑ Learn a method for conducting a SWOT analysis.
- ❑ The Balanced Scorecard: A Framework for Strategy Development.
- ❑ Developing your strategic priorities and goals.

Strategic Planning Is . . .

From the Greek *strateg(os)* meaning “the art of the general.”

Strategic planning is a systematic process for making decisions to guide an organization towards achieving its desired outcomes. Strategic planning involves:

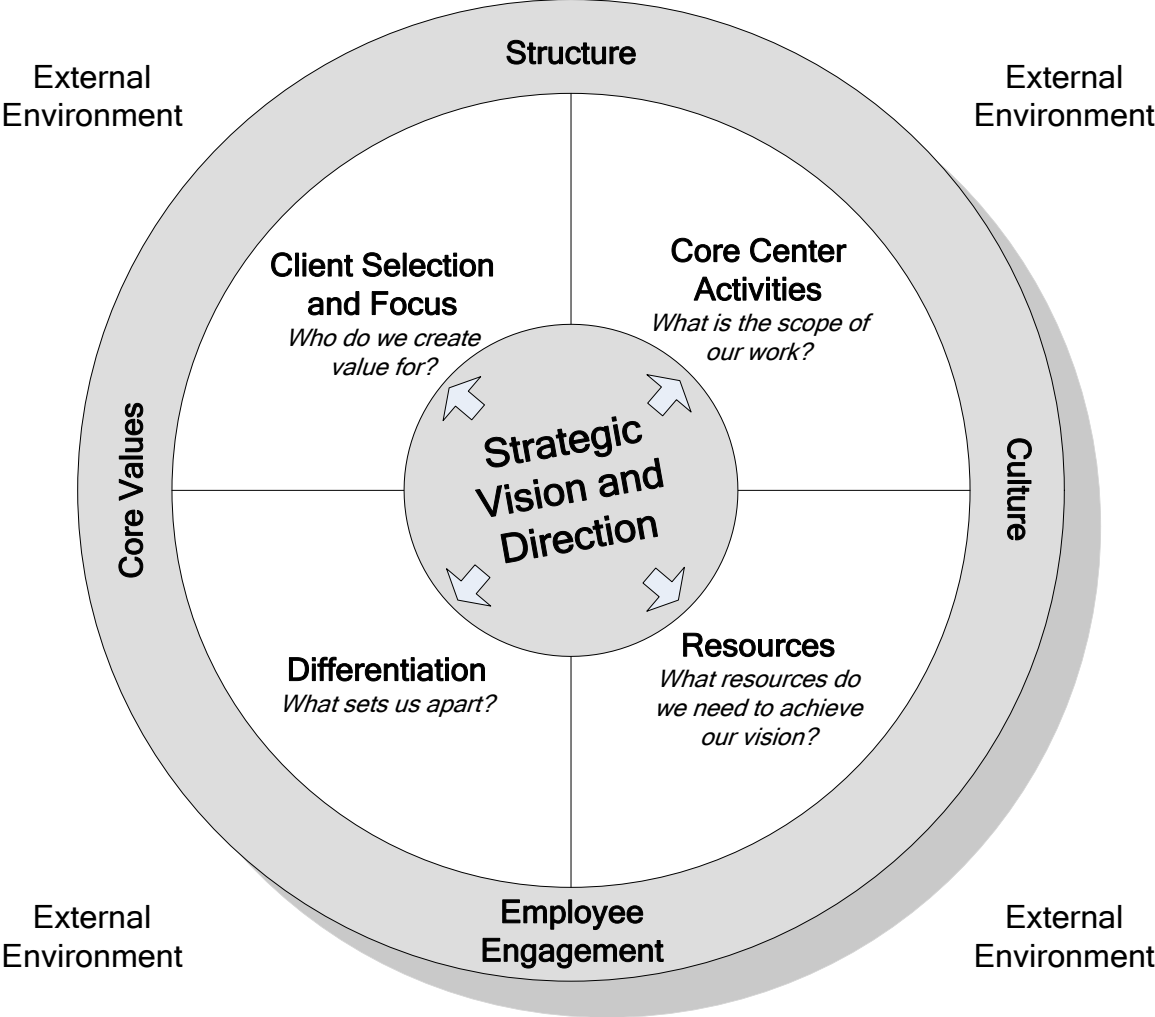
- **Making decisions with an awareness of the future and an awareness of the implications of each future-minded decision.**
- **Organizing systematically the actions of work areas, teams, and individuals to carry out these future-minded decisions.**
- **Measuring the *results* of these actions and decisions against *expectations*.**

Strategic planning is creating conditions in organizations that get people at every level of your Center to think and act strategically — every decision, every action, every day.

Strategic Plan Components

- ◆ **Vision** — A description of the *ideal* future of your Center and the outcomes it hopes to create for those it exists to serve: its clients, customers, funders, and other key stakeholders.
 - ◆ **Mission Statement** — A description of who your Center serves and how it will structure itself to accomplish its preferred future (vision).
 - ◆ **Core Values and Beliefs** — The core values and statements of belief that describe the ideal ways of thinking, deciding, and acting (behaviors) that are central to your Center’s identity and which will guide individual action at every organizational level (e.g., Boardroom, leaders, managers, supervisors, frontline employees, and volunteers).
 - ◆ **Strategic Priorities** — A description of key priorities that your Center chooses to address to enable it to close the gap between where your Center is today and where it wishes to be in the future (its ideal future state).
 - ◆ **Critical Success Factors** — Broad indicators or measures that offer evidence that your Center is making progress towards its core purpose/vision (e.g., a higher level of parent confidence in their ability to help their child successfully navigate the challenges of the world).
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- ◆ **Department/Work Area Strategic Plans** — The long-range plan written by each department or work area in your Center (e.g., outreach, advocacy, education, etc.) that translates your Center’s strategic plan into action at the department/work area level.
 - ◆ **Annual Department Budgets/Operational Plans** — The specific decisions and actions that departments/work areas will annually take and the budget to support these actions in line with the strategic agenda (vision, mission, values, and strategic priorities).

A Model for Strategic Planning



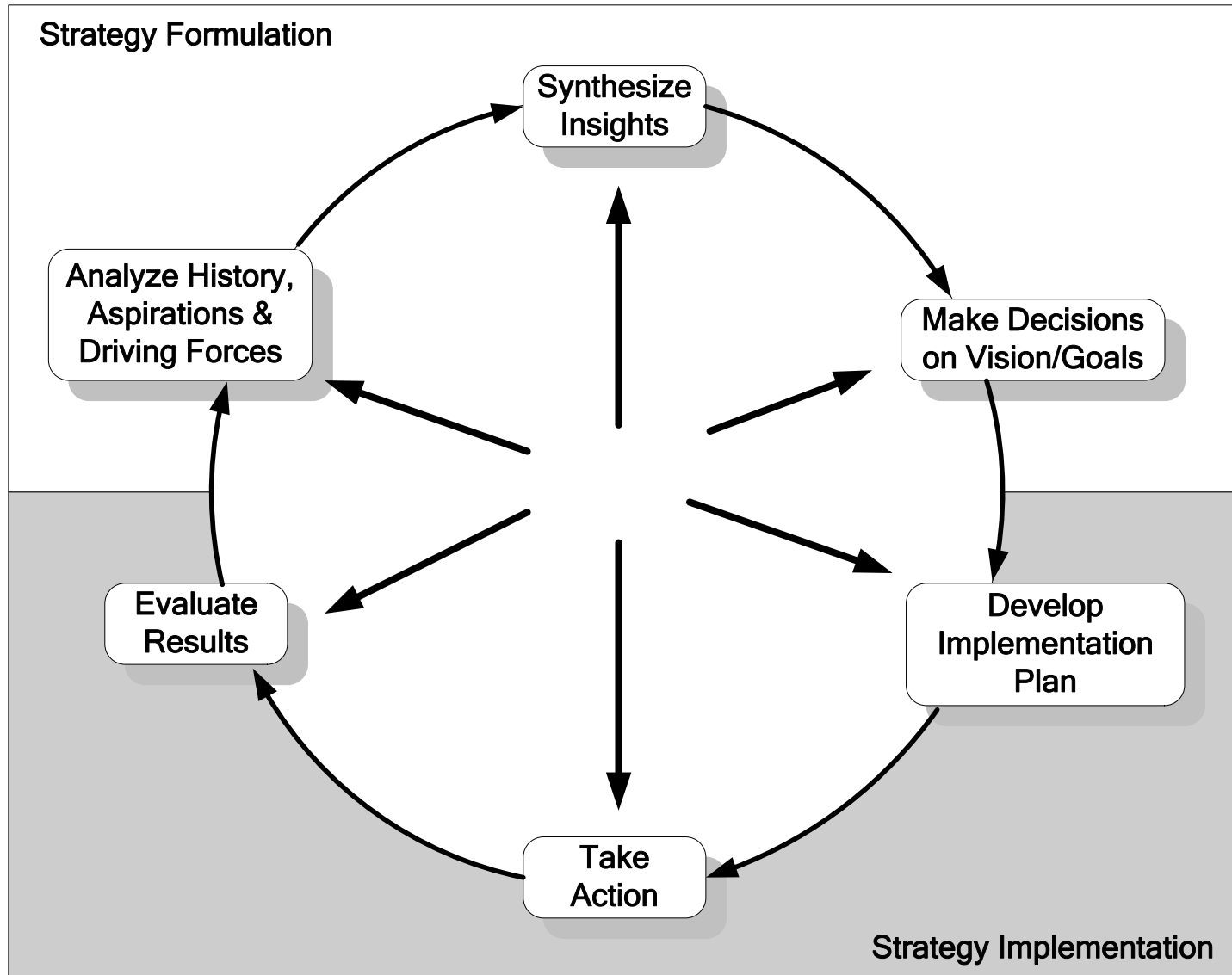
Adapted from the work of M. Liteman, S. Campbell and J. Liteman

The Purpose of Strategic Planning . . .

Strategic Planning Seeks to . . .

1. Clarify and gain consensus around the Center's strategy.
2. Communicate this strategy throughout your Center — and to your customers.
3. Align departmental and personal goals to the overarching organizational strategy.
4. Identify and align your Center's strategic priorities and goals.
5. Guide decision making by the Board, leaders, managers, and frontline employees.
6. Guide resource allocation and the annual/operational budgeting process.
7. Measure/evaluate your Center's progress/effectiveness in achieving its vision and strategy.
8. Identify organizational assets and strengths.
9. Identify opportunities for improvement and learning.
10. Direct skill and knowledge building efforts.
11. Increase the probability of your Center's ongoing relevance to its customers and stakeholders.

Strategic Planning: Strategy Formulation/Strategy Implementation



Strategic Thinking Is . . .

Strategic thinking is a way of looking at the circumstances and the environment facing your Center and then making decisions and taking actions with a strategic mindset.

Strategic thinking is a key competency that should be developed in leaders, managers, supervisors, and front-line employees to enable your Center to identify and take advantage of emerging issues. It involves looking at oneself, your Center, customers, co-workers, and the environment in such a way that the “thinker” is able to see his or her work (actions and decisions) within a larger context.

This larger context involves everyone knowing:

1. The *purpose* or aim of your Center (its vision and goals).
2. The purpose, role, and value of the person's work contribution.
3. The core guiding values or beliefs described in the strategic plan that identify the expectations in attitudes and behaviors of every employee.
4. The current and future needs of his/her customers (internal and external).
5. A profound awareness of what is occurring in your Center's environment (internal and external).

Developing a Strategic Thinking Mindset

The components of the strategic thinking mindset include:

1. **Holding an image of the vision or ideal future for your Center in one's mind.** Strategic thinking begins with a clear understanding of the desired long-range future for your Center. With this vision or idea in mind, decisions and actions are more likely to be directly and indirectly shaped by this overarching objective.
2. **Drawing upon and being shaped by your Center's core values.** While the vision describes the "end state" that individuals are striving to create over time, the core values speak to the moment. The core values, when clearly defined, understood, and accepted by people at all levels of your Center, are more likely to lead to strategic decision making and actions because they speak to the present behaviors, decisions, and actions.
3. **Continuously scanning the environment — looking for opportunities and threats.** The strategic thinking mindset depends upon a keen awareness of the environment. Those who are strategic thinkers always have their antennae up. They discover opportunities by being open and receptive to new information—and they are able to detect potential threats early-on by being conscious of emerging issues and events that may have a harmful effect on your Center.
4. **Seeing the patterns and relationships in events and circumstances.** Strategic thinkers "connect the dots" by looking for and recognizing the patterns and relationships between observed events and circumstances. Strategic thinkers, for example, will be the first to detect an emerging pattern of customer requests or complaints because they are constantly on the lookout for patterns or trends in behaviors. They can then help begin the conversation around the meaning of this trend for your Center and how your Center might best respond from a strategic perspective.
5. **Recognizing the interconnections and interdependencies before making decisions and taking action.** Strategic thinkers are deeply aware of the interdependencies and interrelationships between actions and events. They recognize that every action within a system (e.g., lowering prices to attract new customers) may or may not have its desired effect (e.g., increase in new business), but that there are always *unintended* consequences for this action (e.g., reduced margins, lower perceived value of the product, attracting a different kind of customer, etc.) that *will* occur. This rule—the rule of unintended consequences—is held in great respect by strategic thinkers.
6. **Making decisions and taking actions in the moment that are shaped by the vision, core values, knowledge of the environment, attention to the interdependencies, and with an awareness of the long-term.** The final component of strategic thinking integrates the previous components into a strategic perspective that shapes how the individual makes decisions in the moment—with the long-term vision, core values, and deep awareness of the environment in mind.

Developing Strategic Thinkers . . .

Developing Your Strategic Thinking Mindset

What actions can you take to develop, strengthen, and enhance your strategic thinking mindset?

Developing Others' Strategic Thinking Mindset

What actions can you take to help develop, strengthen, and enhance the strategic thinking mindset of others?

Breakout Room – Developing the Strategic Thinking Mindset

In your BREAKOUT group, first select someone to be the reporter for your group and then identify:

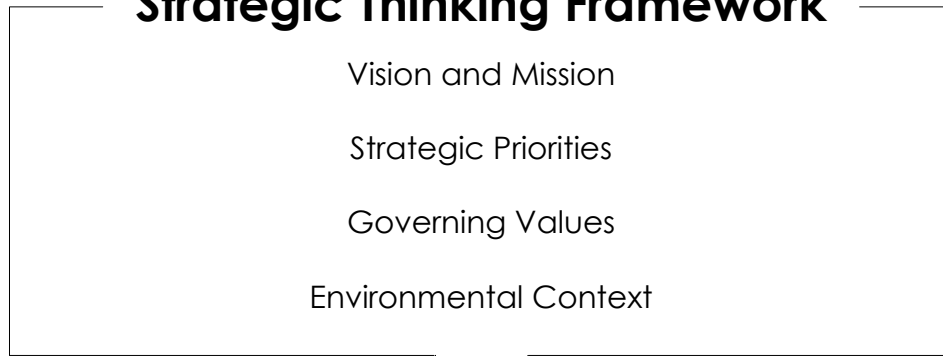
1. Individually share the actions can you take to develop your strategic thinking mindset – and then, as a group, identify THREE ideas to share with the large group.

2. Individually share the actions can you take to develop others' strategic thinking mindset – and then, as a group, identify THREE ideas to share with the large group.

The Levels of Organizational Thinking-Planning-Action

Planning Levels	Desired Result	Style of Action	Underlying Value	Current % of Time	Desired % of Time
Strategic	Achieving an ideal future. Optimizing desired long-term outcomes given internal resources and environmental constraints.	Future-minded, long-term focus. Explores alternative possibilities to achieve success and tackle critical issues.	<i>Controlled</i> instability and optimizing existing and future opportunities.		
Interactive	Exceeding expectations. Going above and beyond. Anticipating needs and daily problems.	Proactive.	Continuous learning and quality improvement.		
Operational	Maintaining the status quo. Conforming to expectations. Controlling/guaranteeing results. Translating strategic plans into action.	Short-term focus. Fixes problems. Maintains smooth operation.	Stability and Control.		
Tactical	Satisfying customer expectations. Solving daily problems. Responding immediately to emerging issues.	Reactive. Short-term focus. Getting results today.	Surviving! Making it through another day!		

Strategic Thinking Framework



Event Calling for a Response

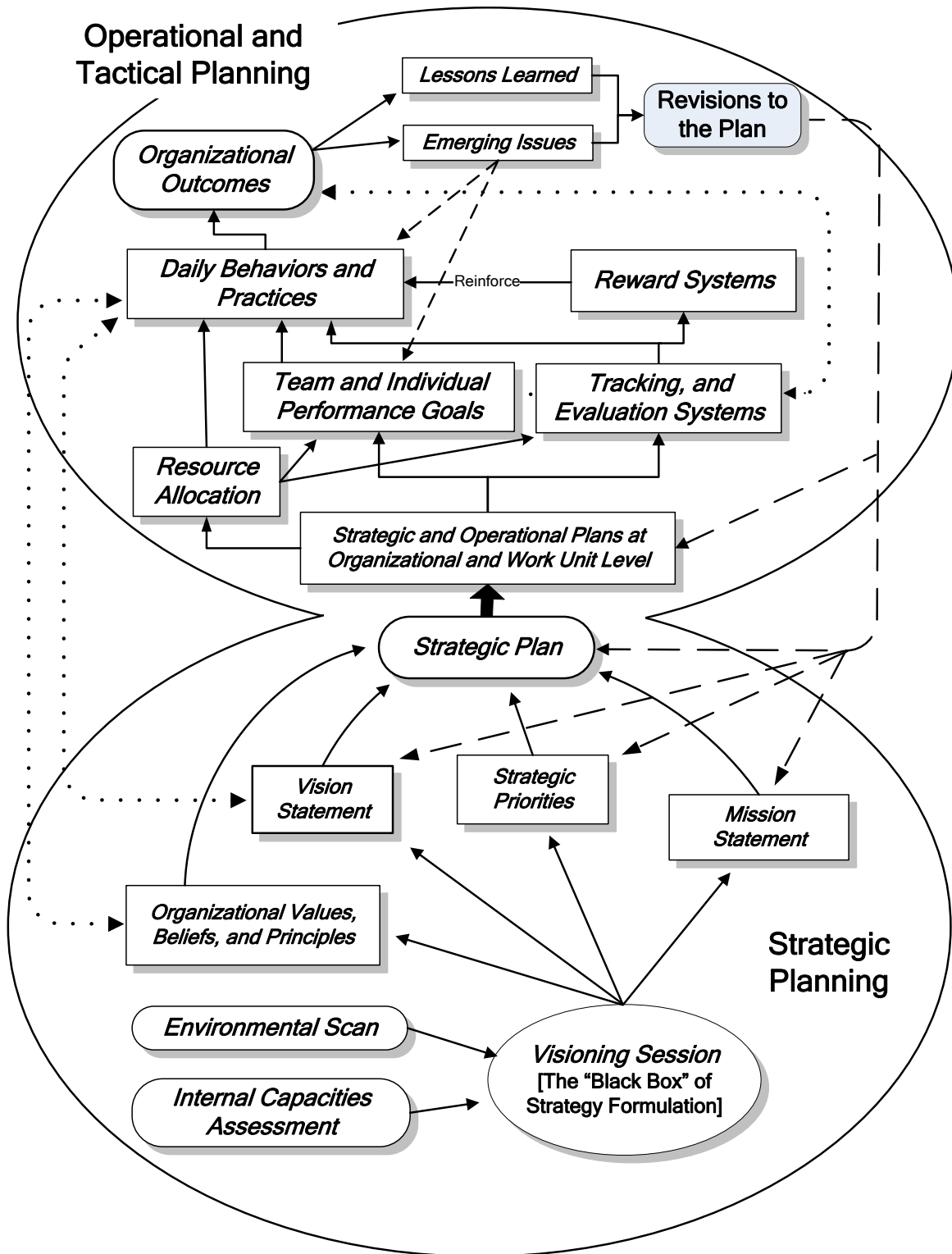
Tactical/Operational Response

- Who is the customer in this situation?
- What is the pressing problem we're trying to solve – or opportunity we're trying to leverage?
- What do we need to do right now to address this issue?
- What immediate actions will help us solve the problem or enable us to realize the opportunity?
- What is our immediate desired outcome in this situation?
- What is our immediate measure of success? How will we know if our actions have been successful?
- Who is primarily responsible and accountable for taking immediate action on this issue?
- How does the vision, strategic priorities, and governing values inform our immediate, tactical, and operational response?
- How might we design or redesign our current operations based upon this situation?

Strategic Response

- What are the factors that contributed to/caused this situation to occur?
- Is this event part of a recognizable pattern that we should try to understand?
- What are the long-term implications of any tactical/operational response we are considering or that we actually took?
- How is this situation related to other situations we have faced in the past, are currently facing in the present, or are likely to face in the future?
- What are the possible systemic and underlying causes driving the emergence of this issue?
- What are the long-term measures that we might use to evaluate our effectiveness at addressing this issue?
- What is our long-term desired outcome in this situation?
- How does this issue relate to our vision, strategic priorities, and our guiding values?
- Who are the long-term customers and stakeholders in this situation and how are they each affected by the issue and our intended actions?
- Where does long-term responsibility for taking action and being accountable for results lie?

Strategic Planning as Catalyst for Action



Stages of the Strategic Planning Process

Stage One	A. Take Stock of the Present
	Identify our current reality. Where are we now ?
Stage Two	B. Assess the Internal and External Environment
	What are our internal <i>Strengths</i> and <i>Weaknesses</i> ? What are the external <i>Opportunities</i> of which we should take advantage and <i>Threats</i> that may jeopardize our future success?
Stage Three	A. Create a Shared Vision of the Future
	What do we exist to create or accomplish?
Stage Four	B. Define Key Guiding Principles or Values
	What values or beliefs should we follow to achieve our vision?
Stage One	A. Identify Critical Strategic Priorities
	What priorities must be addressed if we are to achieve our vision? Where do we need to focus our attention and energy to leverage our strengths, take advantage of our opportunities, address our weaknesses, and prepare for the threats?
Stage Two	B. Develop Initiatives, Goals, & Action Plans for Each Strategic Priority
	What is the expected outcome from each strategic priority? What initiatives or goals will move each priority forward? For every initiative/goal: What is the desired outcome? How will progress be measured? What actions do we need to take? Who is responsible for each action? What is the implementation timeline? Which resources will be required?
Stage Three	A. Develop Operational Plans at the Department/Unit Level
	What are the roles, responsibilities, and duties of each Center department and work area for making progress on the strategic priorities and initiatives?
Stage Four	B. Monitor Actions, Evaluate Progress, and Revise the Plan
	How will we know when we're successful for each goal? How will revisions to the plan be made? How will we keep on track? How will we ensure that the plan stays dynamic and responsive?

Actions for Each Strategic Planning Stage

Leadership/Employee Actions to Facilitate Strategic Planning at this Stage	
Stage 1	<ul style="list-style-type: none"> • Gather data on your Center's past and present performance. • Identify <i>statutes, laws, contracts, agreements, etc.</i> that may restrict/limit independent action by your Center. • What is the <i>current</i> vision and mission? What are your Center's current goals? • How <i>successful</i> have we been in achieving our vision/mission/goals? • Gather data on employee, customer, investor/shareholder, and other stakeholder <i>perceptions of your Center</i>: What are its internal strengths and weaknesses? • Assess the <i>external forces</i> (challenges/threats and opportunities) that are currently influencing or are likely to influence your Center's future in a positive or negative way.
Stage 2	<ul style="list-style-type: none"> • Ask people what your Center should aspire to accomplish or create for the customer, for investors/shareholders, the larger community, etc. • Explore people's expectations for the core values that should govern the way we work together, make decisions, serve customers, etc. • Conduct employee, customer, and shareholder focus groups/surveys to gather insights on key stakeholder expectations, hopes, and core governing values. • Gather information from people from all organizational levels. Gain a holistic understanding of how people see your Center and its ideal future. • Create a truly <i>shared</i> vision by inviting people to contribute their ideas to it – making it their own.
Stage 3	<ul style="list-style-type: none"> • Ask people to identify the issues (from SWOT) that are likely to have the greatest influence your Center's future and its ability to achieve its vision/goals. • Prioritize the issues from greatest impact on the vision (high leverage) to least impact. • For each strategic priority, clarify: What is this priority all about? What desired outcomes do we wish to achieve in this area? What does success on this issue look like? How critical is it that we achieve progress on this priority? • For each high leverage strategic priority, develop a detailed action plan that spells out the key initiatives/goals to be achieved and for each initiative identify outcomes, measures of performance, key actions, who will take action, and the timeline for moving forward.
Stage 4	<ul style="list-style-type: none"> • Each major sub-unit/work area of your Center develops both a strategic and an operational plan that helps move the unit and your Center towards the vision – each strategic and operational initiative should connect to key strategic priorities. • Some of your Center's strategic priorities or initiatives may fall in the responsibility of a department, location, or work team (e.g., development, human resources, budget, etc.). In these cases, this sub-unit takes the lead on the strategic priority/initiative. • Collaborative efforts (across sub-unit boundaries) should be initiated to achieve synergy. • Identify a single point of responsibility for monitoring/coordinating/integrating the strategic priorities and initiatives (this could be a workgroup or an individual). • Develop a reporting/communication process to keep all players involved, responsible, accountable, and informed. • Develop monthly and semi-annual "checks" – tracking progress, measuring results against the vision, monitoring critical success factors, and assessing success on individual initiatives. • Make adjustments to the plan as it unfolds . . . amend, add, subtract, put on hold, etc.

Creating a Shared Vision

The vision creates a picture of how we would like the future to be — the “end state” or long-range result of our work, not the *means* of getting there.

An Effective Vision . . .

- ◆ Captures people's imagination and engages their spirit.
- ◆ Inspires people to excellence.
- ◆ Provides a clear and compelling focus in an uncertain, ever-changing world.
- ◆ Provides a benchmark for evaluating our actions.
- ◆ Challenges people to unite and focus their energies on a common goal/good.

Key Questions that a Vision Seeks to Answer

Where are we going and **why**?

- What does success look like 5+ years into the future?
- What is our “north star” – the thing that we are here to create in the world?
- What difference do we wish to make in the lives of those we serve?

Characteristics of a Vision Statement

- At least five plus years into the future.
- Future tense: *We envision a future where . . . and by 2030 we will . . .*
- Aspirational and inspiring – describes our hopes for the future.
- Audacious – bold, big, broad, shooting for the stars, etc.
- Descriptive – tells a story about how the world will be different because of what we do.
- Succinct, focused, and clear – says all of the above in as few words as possible.

Creating a Shared Vision . . .

- Post card from the future . . .**
- Front page news from 2030 . . .**
- Using metaphors . . .**
- Telling stories . . . *When we're at our best . . .***

Writing the Mission Statement

Definition

Mission Statement — A description of who we serve and how we will structure ourselves to accomplish our preferred future (vision). More grounded and descriptive than the vision statement. Describes the structure and strategy to achieve the vision.

Elements of a Mission Statement

The mission statement identifies:

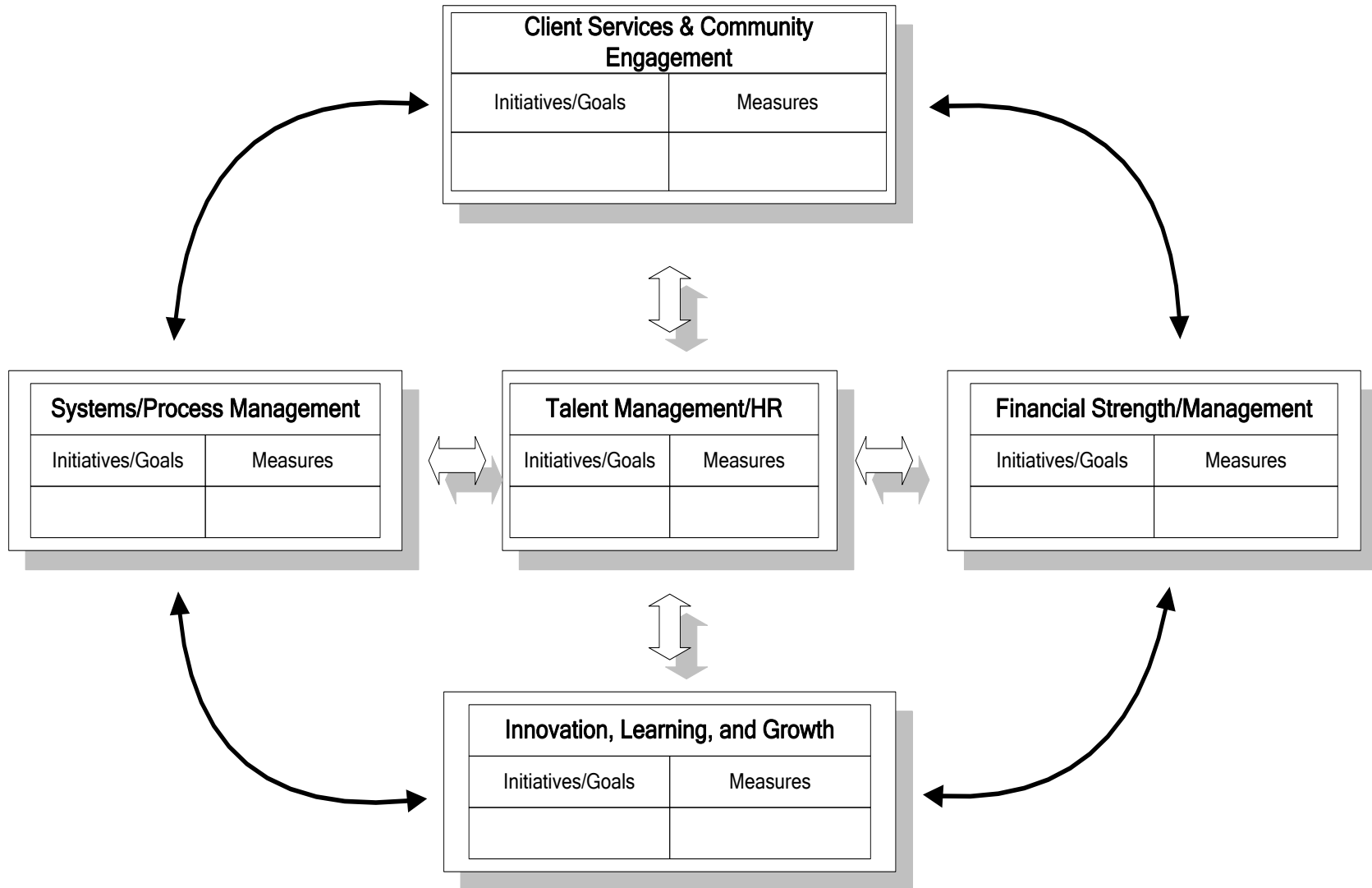
- **What** we do
- **Why** we do it
- **Who** we serve
- **How** we deliver results

Example

Second Harvest Foodbank: *Our mission is engaging the community to end hunger. We accomplish our purpose by distributing food donated by individuals, corporations, non-profit, and charitable organizations to people in need through our expansive food pantry network. Our success in this effort is made possible by working in partnership with hundreds of local hunger-relief charities to provide the peace-of-mind people get when they have enough food.*

The Balanced Scorecard: A Framework for Strategy

A framework for determining your Center's 5-7 key strategic priorities and the initiatives/goals to accomplish these priorities.



Adapted from *The Balanced Scorecard* by Robert Kaplan and David Norton, 1996.

Key Components of the Strategic Agenda

Strategic Priority Development Should Include . . .

1. What is this issue? Why is it important to address? What are the long-term consequences/effects of this issue?
2. If this issue is successfully addressed, what will the outcome look like? What is the positive outcome we hope to achieve? How will we measure results?
3. For improvement areas/challenges, what are the underlying causes that sustain this issue? For strengths/opportunities, what are the forces driving/sustaining this issue?
4. What are two to five strategic initiatives or goals that your Center should undertake that move this strategic issue forward?
5. Who is the champion for this strategic priority? Who will be the “conscience” of your Center to hold it to account for making progress on this priority?

Strategic Initiative Development Should Include . . .

Each *strategic initiative* or goal should be developed to include the following:

1. What is the desired outcome? Once this initiative is addressed, what will the end result look like for the company? For the customer?
2. How will we measure success towards the initiative?
3. What are the critical steps that must be taken to reach the desired outcomes?
4. Who is responsible for carrying out each step of the plan?
5. What resources (financial, human, informational, technological, etc.) are required to accomplish each step?
6. What is the timeline for each action step and the overall result?
7. What potential “roadblocks” may prevent us from progress — and what is our strategy to address each roadblock that we will build into our plan to “protect” the plan?

Common Barriers to Strategic Implementation

Strategy implementation often fails due to . . .

1. The failure to use an inclusive process that integrates diverse perspectives during the plan's development.
2. The failure to create a strategic vision and plan that is truly a shared one—one that taps into the hopes, dreams, aspirations, and passions of people at every level of your Center.
3. The failure to develop strategic thinking skills throughout your Center to support the implementation and modification of the plan.
4. The strategic vision and agenda aren't actionable.
5. The lack of designed-in performance measures and accountability for results.
6. Your Center's method for tracking performance tends to focus more on *tactical* measures rather than *strategic* ones.
7. The failure to make the plan truly dynamic and responsive to emerging issues, innovation, and the forces driving change on the ground.
8. The failure to forge a strong link between the vision and strategic plan and the performance expectations and accountabilities of department, work unit, team, and individuals.
9. Your Center's method for allocating resources isn't linked to the strategic plan.
10. The failure to understand your Center's culture and its past behavioral patterns (e.g., "We ignore strategy from the top." "Our Center's track record on goal attainment is spotty.").