

CANDO

BC Links to Learning

*Strategic Planning – The roadmap To Successful
Organizations*

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AGENDA

Introductions

Strategic Planning Overview

- ✓ Vision and Mission Statement
- ✓ Organizational Values
- ✓ Environment Scan (SWOT)
- ✓ Strategic Priorities
- ✓ Creating Strategic Goals
- ✓ Annual Planning
- ✓ Keeping the Plan Alive

Case Study






Who is NVIT ?

- Founded by 5 First Nations Bands in the Nicola Valley (1983);
- Public Post-Secondary Institution (1995);
- 2 Campuses: Merritt / Burnaby (2007);
- Indigenous Mandate;
- Deliver courses in approx. 35 communities each year;
- First Nations Board of Governors
- Elders Council

The Home of Aboriginal Public Post-Secondary Education in BC





NVIT Quick Facts

- Approximately 1400 students
- Approximately 80% are of Indigenous ancestry;
- 117 distinct BC First Nations represented in 2016/17 (Approx. 60%)
 - Additionally 8 Provinces and Territories represented
- Many students come to NVIT without grade 12

The Home of Aboriginal Public Post-Secondary Education in BC



NVIT Quick Facts

- Tuition free Adult Basic education
- Children in care tuition waiver
- Significant student supports-elders/breakfast/community based assessments
- Transferability: programs / courses are accredited and transferable to institutions across British Columbia and Canada.
- Small class sizes: allows students to share experiences, answer questions and interact easier with peers and instructors.
- Engaged students, building confidence, gaining experience and preparing for further studies or the work place.
- Community Education a significant part of what we do.

The Home of Aboriginal Public Post-Secondary Education in BC



Strategic Planning

*THE BENEFITS OF PLANNING FOR
OUR FUTURE*



Why you need a Strategy: 5 Reasons to Plan

https://www.youtube.com/watch?v=Ydt6Nm_F-Rl



Leadership Strategies



Strategic Planning – An Overview

Strategic Planning focuses our attention on
the most important issues and on how
best to resolve them
... as often as not, with scarce resources.



Strategic Planning – An Overview

... a formula for success

Envision your destination

Plan how to get there

Take action!

- Your Vision

- Where are we now?
- Where do we want to go?
- How will we get there?

- "Do it"!




4 Strategic Questions

1. Where is our business, organization or community today?
2. Where is it going?
3. How will it get there?
4. How will it evaluate its progress?




Some Benefits Strategic Planning

- ✓ stimulates forward thinking
- ✓ keeps you focused on your own priorities
- ✓ influence rather than be influenced
- ✓ builds teamwork & expertise
- ✓ improves performance
- ✓ helps solve organizational problems






Developing a Strategic Plan

Mission Statement:	Why do we exist? What is our purpose?
Vision Statement:	Where do we see ourselves in the future? What do we look like in X years?
Values Statement : (Guiding Principles)	What do we stand for? What do we believe in?
SWOT Analysis:	Where are we at, what is our reality? What impacts on us '+' and '-'?
Strategic Objectives: (themes, priorities, long term)	What are the key activities we need to perform/monitor to achieve our vision?
Short term goals	1 to 3 year goals (SMART goals) What targets can we aim for to begin to achieve strategic objectives?
Action Plan	How will we achieve our goals?

- ## Planning Process
- ✓ Organize and Plan to Plan
 - ✓ Determine Vision, Mission, Values
 - ✓ Identify Long-Term Goals
 - ✓ Evaluate the Internal and External Environment (SWOT)
 - ✓ Create Strategies to Realize Long-Term Goals
 - ✓ Develop Short Term Goals and Objectives
 - ✓ Monitor and Evaluate Progress



Leadership vs. Management

LEADERSHIP	MANAGEMENT
<ul style="list-style-type: none"> • Establishing direction • Aligning people • Motivating and inspiring • Produces change <p style="color: red; font-style: italic;">Leadership is about doing the right things</p>	<ul style="list-style-type: none"> • Planning & budgeting • Organizing & staffing • Controlling & problem solving • Produces a degree of predictability <p style="color: blue; font-style: italic;">Management is about doing things right</p>

Mission, Vision and Values Statements

Mission Statement

You exist to do something for someone (or some group) ...

- **What do you do?** What don't you do?
- How do we do it?
- Who do we do it for?
- What value are we bringing?



Fast Company

Mission Statement

How to Write a Mission Statement That Doesn't Suck

<https://www.youtube.com/watch?v=LjhG3HZ7b4o>



Writing a Mission Statement

- simple and direct
- an action, not a sentiment
- quantifiable, not vague
- clearly convey why we are here
- If you're trying to sell a product, how and how many? If you're trying to change lives, how and whose?
- In real, printable words and figures should reflect your ambitions, and the difference that you want to make

<http://www.fastcompany.com/1400930/how-write-mission-statement-isnt-dumb>



Some good examples

- A computer on every desk and in every home, all running Microsoft software

Microsoft doesn't just want to sell software -- it wants its software on every computer, in every home

- Every book ever printed, in any language, all available in less than 60 seconds

Amazon (Kindle) doesn't just want you to buy a book;

they want to help you do so in under one minute



... some not so good!

- It is our job to continually foster world-class infrastructures as well as to quickly create principle-centered sources to meet our customer's needs.
- Our challenge is to assertively network economically sound methods of empowerment so that we may continually negotiate performance-based infrastructures.



NVIT Mission Statement

*Empowering learners by
strengthening voice and identity
through education*



Huu-ay-aht Mission Statement

Pursuing self-reliance through economic opportunities, empowering and supporting citizens, stewardship of Hahuuli, and revitalizing language and culture for all Huu-ayaht.



Vision Statement

- A clear image of what your future will look like
- Where you see yourself in ___ years
- What you *want to be* (not what you do)
- Creates excitement, motivates people
- Guides your activities, and decisions
- Think long term, think big



Vision Statement

- Clear and inspirational long-term desired change resulting from your organization's work
- What you aspire to be ...
- ... aspirational, not delusional! You should actually be able to see yourself there!



Vision Statement

NVIT Vision:

*As an Indigenous centre for excellence,
NVIT inspires learners to strengthen
community*




OUR VISION

The Huu-ay-aht envision a strong, self-governing and self-reliant Nation.

lisaak will guide us as we work together to foster a safe, healthy and sustainable community where our culture, language, spirituality and economy flourish for all.

**Ancient Spirit,
Modern Mind**



Charting our course ... paddling our canoe together!



No matter what your role, ... "getting positive results" ... and arriving at our destination ... is the ultimate goal




Values Statement

- “Guiding Principles”
- What we believe in and hold true
- What guides our behaviour
- What is the expected behaviour in the organization?
- Values shared by the group
- 5 – 7 values




Values Statement

- Principles should not/will not be compromised – core statements that guide your every action and day-to-day decisions
- They describe your beliefs and behaviors. They are the things that you believe in that will enable you to achieve your vision and mission.




Values Statement

- Important to use the statement; give it to life
 - Incorporate into policy
 - Reinforce through informal ‘training’ or round table discussions (eg staff meetings)
 - Reward behaviours consistent with stated values (consequences otherwise)




Values Examples:

• Ambition	• Credibility	• Wisdom
• Competency	• Honesty	• Independence
• Individuality	• Innovation	• Security
• Equality	• Teamwork	• Challenge
• Integrity	• Excellence	• Influence
• Service	• Accountability	• Learning
• Responsibility	• Empowerment	• Compassion
• Accuracy	• Quality	• Friendliness
• Respect	• Efficiency	• Discipline/order
• Dedication	• Dignity	• Generosity
• Diversity	• Collaboration	• Persistence
• Improvement	• Empathy	• Optimism
• Enjoyment/Fun	• Accomplishment	• Dependability
• Loyalty	• Courage	• Flexibility




Huu-ay-aht Sacred Principles

ʔiisaak
Greater Respect. Personal and collective respect for the community and its people, traditional knowledge, the natural world, the metaphysical world and other peoples and communities.

ʔuuʔaʔuk
Taking Care Of... In this context, this is about taking care of present and future generations as well as taking care of the resources provided by the land and the natural world.

Hišuk ma c̓awak
Everything is One. A notion of the interconnected, interdependent and reciprocal relationship between the people, the land and the wider world(s) in a physical, spiritual and social sense.




NVIT Values:

- **Respect**
- **Accountability**
- **Integrity**
- **Balance and Harmony**
- **Growth and Development**
- **Inclusion**
- **Communication**




Environmental Scans: SWOT

LOOKING AT WHERE WE'RE AT




SWOT Analysis

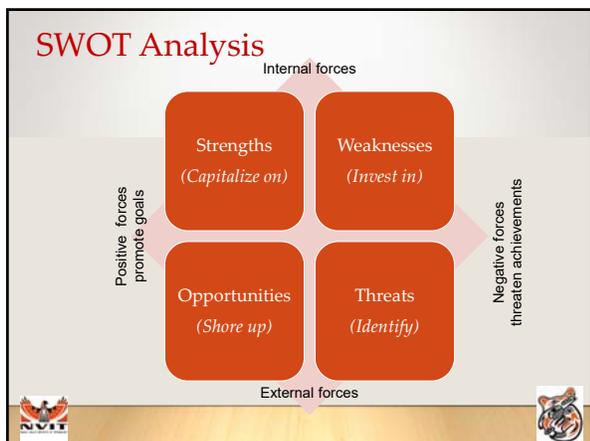
Identify and assess your current environment
... where are you at today?

- Strengths
- Weaknesses
- Opportunities
- Threats

Focuses on identifying:

- Internal and external forces
- Positive and negative forces



<p>Strengths</p> <ul style="list-style-type: none"> • Organization stability • Strong reputation (among all partners) • Understand communities and clients • Innovation, responsiveness 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Organizational Leadership • Communications • Client Services • Funding
<p>Opportunities</p> <ul style="list-style-type: none"> • Build Partnerships: • Increase sources of funding • Enhance our organization to be more effective • Enhance client services 	<p>Threats</p> <ul style="list-style-type: none"> • Funding • Not keeping current with technology and information • Increased Defaults resulting from lack of ability to follow up • New government, new policy • Loss of staff; continuity in the Board • Impact of resource development projects being struck

“Strategic Objectives”

“Long Term Goals”

Strategic Priorities

“Themes” “Long Term Goals” “Strategic Objectives”

- Broad and far-reaching statements
- Generally non-measurable, and not time specific
- Long-term (3 years or longer), continuous strategic areas that get you moving towards achieving your vision
- Think of them as “mini-vision statements”!

Strategic Priorities

- What must we focus on (key activities) to achieve our vision?
- How will we address the gaps (and opportunities) addressed in our SWOT analysis?

Objectives for First Nations and organizations commonly involve areas (themes) of:

- Finances and generation/preservation of wealth
- Effective utilization of assets
- Customer/client satisfaction
- Managing lands/resources/assets
- Social responsibilities (including cultural)
- Organizational structure/effectiveness
- Communications



NVIT's Strategic Priorities

- Learner Centered
- Academic Excellence
- Community Relevance
- Organizational Effectiveness



Short Term Goals

- Short term (1-3 years) statements of specific, measurable actions
- Designed to express goal of changing/moving closer to vision
- Hint: start with a verb (action word) ... *increasing, decreasing, reducing, enhancing, ...*
- Statement of how we'll move towards our vision



SMART GOALS

Specific	<ul style="list-style-type: none">• What are you going to do?• Why is this important to do now?• How are you going to do it?
Measurable	<ul style="list-style-type: none">• "If you can't measure it, you can't manage it"• Helps you to see the changes occur
Attainable	<ul style="list-style-type: none">• Keep it within reach or it won't motivate you if it feels impossible• Should push you slightly and need real commitment (don't set the stage for failure)
Realistic	<ul style="list-style-type: none">• "Do-able", but not easy• You have the necessary skills and resources available• Set the bar high enough to feel satisfactory achievement
Time Bound	Set deadlines to create sense of urgency to take action



Developing and Using Action Items



Action Items

- ... now we're clearly into responsibility area of administration and operations
- Action items move the strategy into operations
- Undertaken by individuals or teams on staff/contract within a specific time period



Action Items

- For each SMART Goal, identify
 - Action items required to achieve the goal
 - Level of priority (high, medium, low)
 - Who will 'lead' the action item and which other departments are involved
 - When the action will start
 - A targeted end date for the action
 - Financial resources required (if any)



Align your resources

Assess budget and skills

- Do you have the right people with the right skills?
- Do you have the financial resources for any 'new' items?
- When and how will the plan be communicated to all who need to know



Implementing and Monitoring the Plan



Implement the plan!

- Implementation is on-going
- Hardest thing to do
- Identify your planning cycle (including review dates) on your calendar
- Ensure you have a strategy manager who is responsible for managing the plan and ensuring the team meets timelines



Monitor the plan!

- Track progress through regular meetings, check-ins (monthly, quarterly)
- Team members report on % complete and status (on target, not on target, past due)



Monitor the plan!

- Firmly commit to holding your strategy review meetings (miss 1 and it becomes a habit)
- Modify or review if necessary



How Does NVIT do it ?

- President's report at each board meeting provides progress on each strategic priority and goal. If no progress, I explain why.
- Key Performance Indicators – We have developed a KPI document which shows progress on each goal.



2018 – 2023 Key Performance Indicators
Annual Targets and Assessment

Strategic Direction: Learner-Centered

KPI	Data Source	Frequency	Benchmark	Actual/Assessed
Goal 1: Motivated and engaged learners Respondents indicating graduation is very important or important Respondents to never have considered leaving NVIT during the school year	NVIT Student Engagement Survey NVIT Student Engagement Survey	Annually Annually	> 80% > 80%	
Goal 2: Shared responsibility and accountability for a learner centered environment Implementation of Sexualized Violence Policy Increase student involvement in extracurricular initiatives Develop Institutional Learning Outcomes (ILO) project plan to integrate, measure, and report AQ innovation across services and curriculum	LT Report to President President's Report President's Report President's Report		75% 75% 75%	
Goal 3: Opportunities for career development and training Work with government, industry, and other NVIT supporters to increase student supports and career opportunities including applied learning and co-op programs	President's Report		75%	
Goal 4: Services and supports that honour an Indigenous experience Explore campus enhancements that support and enhance an Indigenous student learning experience Increase campus safety initiatives including "Get Consensual" campaigns	President's Report President's Report		50% 75%	

Legend:
KPI
Actual/Assessed
Complete (100%)
Significant Progress (75%-99%)
In Progress/On Track (50%-74%)
Minor Concern (25%-49%)
Scheduled
No longer a priority

Communicating Your Strategic Plan

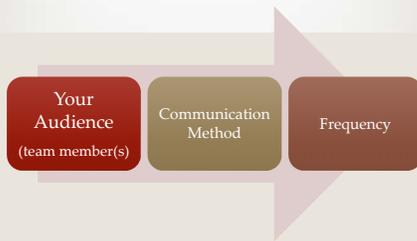


Communicating Your Strategic Plan

- Communicating your strategic plan & aligning your team is just as important as creating the strategy!
- The vision, mission and objectives cannot be achieved if you are not “on the same page”
- Stakeholders need to fully understand strategic direction (directors, managers, support staff, other team members you may bring on for specific projects/activities)



Communicating Your Strategic Plan



Communication Method

- Determine how you will communicate the information to each person/group in your audience (internal or external) i.e. presentations, posters, team meetings, website, individual conversations
- ✓ Spread the word – use the vision, mission, objectives wherever you can
- ✓ Have fun & keep your materials interesting!
- ✓ Be brief and to the point
- ✓ Use various media (print, video, brochures, newsletters)
- ✓ Deliver the information with enthusiasm!
- Remember: This is your opportunity to champion your shared vision, strategic direction and gain support



Frequency

- How often are you going to communicate with various audiences (*to keep everyone up to speed on progress & work through challenges together*) i.e.....
- Internally: 1/4ly basis for key performance indicators
- Externally: annually for stakeholders or funders



Remember....

- Communicating your strategic plan & aligning your team is just as important as creating the strategy!



Tips For Keeping Your Plan Alive

1. **Promote ownership throughout the organization:** If people don't have a stake and responsibility in the plan, it'll be "business as usual" for all but a frustrated few
2. **Communicate the plan:** To all relevant audiences so they understand how they are expected to contribute
3. **Keep the strategic plan alive:** The plan is the basis for all that you do, not separate from operations
4. **Keep the strategic objectives alive:** day to day operations should reflect and support your long term goals
5. **Don't be over-ambitious:** Keep your goals and timelines realistic. Focus on priorities so staff are clear on their responsibilities to bring the plan to life



Tips For Keeping Your Plan Alive

6. **Develop meaningful 'core' statements:** The vision, mission, and value statements should not be viewed as "fluff". They should accurately reflect your ambitions and all stakeholders should have had a part in their development.
7. **Review the plan regularly:** Develop a regular schedule to review the plan to track progress, and celebrate achievements and milestones. Expect reports from individuals who have been assigned responsibility.
8. **Don't leave the planning session without talking about implementation:** The planning document is the base from which to start to implement your plan, not the end result.
9. **Empower employees with responsibility:** Make sure employees have the authority, responsibility, and tools necessary to impact relevant measures. This promotes involvement and ownership.



Good Luck!



Questions ?

- Did we meet your expectations ?