Strategic Planning Overview

Strategic planning is a tool used to help an organization do a better job – to focus its energy, to ensure that members of the organization are working toward the same goals, to assess and adjust the organization’s direction in response to a changing environment.

It is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it des, and why it does it with a focus on the future.

Pre-Planning Session

We will address these questions

1. Where are we now?
   a. Mission Statement
   b. Purpose
   c. Vision Statement

2. Where are we going in the next 5 years?
   a. Long-term goals
   b. Short term goals

In the following exercises we will

1. Review and refine/recreate our mission statement
2. Clarify and refine our purpose
3. Review and refine/recreate our vision statement
4. Establish our long term goals
5. Establish our short term goals
Where Are We Now? - Mission Statement

Mission Statements

In a few sentences a mission statement needs to communicate the essence of your organization to your stakeholders and to the public. The mission statement is one guiding set of ideas that is articulated, understood and supported by the organization’s stakeholders, board, staff, volunteers, donors, clients, and collaborators.

What Should Be in a Mission Statement?

Purpose Statement: clearly states what your organization seeks to accomplish. In defining purpose—focus on outcomes not methods.

- Why does your organization exist?
- What is the ultimate result of your work?

Purpose Statements usually include 2 phrases:

- An infinitive that indicates a change in status, such as to increase, to decrease, to prevent, to eliminate
- An identification of the problem or condition to be changed.

Example: “to eliminate homelessness.”

Business Statement: outlines the “businesses” (i.e. activities or programs) your organization chooses in order to pursue its purpose.

- What activity are we going to do to accomplish our purpose?

Example: “to eliminate homelessness by providing job training to homeless individuals.”

Values: beliefs that your organization’s members hold in common and endeavor to put into practice. Values guide your organization’s members in performing their work.

- What are the basic beliefs that we share as an organization?

Examples:

- “a commitment to excellent services, innovation, diversity, creativity, honest and integrity.”
- “eating vegetables is more ecologically responsible then eating beef.”

Sample Mission Statements

At the Developmental Studies Center we develop, evaluate, and disseminate programs [business] that foster children’s ethical, social, and intellectual development [purpose]. While nurturing children’s capacity to think skillfully and critically, we also strive to deepen children’s commitment to pro-social values such as kindness, helpfulness, personal responsibility, and respect for others – qualities we believe are essential to leading humane and productive lives in a democratic society [values].

The YMCA of San Francisco, based in Judeo-Christian heritage [values], seeks to enhance the lives of all people [purpose] through programs designed to develop spirit, mind and body [business].
Mission Statement Brainstorm Exercise (we may work in groups or pairs)

Current Dolores Huerta Labor Institute Mission Statement:

Educating and Engaging Students to Understand their Future as Workers and Professionals

In the following sheets provided write down up to 5 ideas for a the Institute’s

- Purpose statement
- Business statement
- Values

Go to next page
Dolores Huerta Labor Institute Strategic Planning: Pre-Planning Session

Dolores Huerta Labor Institute's Purpose

Page 4 of 15
Dolores Huerta Labor Institute Strategic Planning: Pre-Planning Session

Dolores Huerta Labor institute’s Values
Collective Creation of Mission Statement Exercise

1. Share everyone’s ideas for the purpose, business and values of the Institute
2. Narrow down to ones we all agree on
3. Craft potential mission statements
   a. (We may skip this—as it can get unwieldy to draft a mission statement as a group. If we skip, I will draft a statement and circulate for feedback until we reach a consensus.)
Where Are We Now? - Vision Statement

Martin Luther King, Jr. said, “I have a dream,” and what followed was a vision that changed a nation.

A vision is a guiding image of success formed in terms of a contribution to society. It is a description in words that conjures up a similar picture for each member of the group of the destination of the group’s work together. It is a guide to implementing strategy.

A mission statement answers: Why does our organization exist? What business are we in? What values will guide us? A vision statement is more encompassing. It answers the question, “What will success look like?”

A vision statement should be realistic and credible, well articulated and easily understood, appropriate, ambitious, and responsive to change. It should orient the group’s energies and serve as a guide to action. It should be consistent with the organizations’ values. It should challenge and inspire the group to achieve its mission.

You will never be greater than the vision that guides you. The vision statement should require the organization’s members to stretch their expectations, aspirations, and performance.

Current Dolores Huerta Labor Institute Vision Statement:

To Educate Every LA Community College Student About the Labor Movement
Vision Statement Brainstorm Exercise

Write down what you would like the Institute to accomplish in the future in 5 to 10 years.

Consider the following as you brainstorm:

- How do you want your community to be different?
- What role do you want this organization to play in your community?
- What will success look like?

We will then discuss and write down the values we share in pursuing a vision.
Metaphor for the Organization Exercise (We will into groups/pairs for this exercise.)

Goal of this exercise: To find language and imagery that our organization’s members can relate to as our vision for success.

Exercise:

Come up with a metaphor for this organization and draw a picture of success. We will share our pictures of success with each other.
Collective Creation of Vision Statement Exercise

1. One or two people try to draft a vision statement based on our group discussion.
2. Narrow down and revise to something we agree
Dolores Huerta Labor Institute Strategic Planning: Pre-Planning Session

Where Are We Going in the Next 5 Years?

In preparing for our Strategic Planning Retreat, we want to establish our goals for the Institute. We want to align our goals with the Board’s/District’s goals.

Below are the District/Board goals from the District Governance & Functions Handbook.

The District Strategic Plan 2006-11 Goals

Increase awareness of the educational opportunities available at LACCD colleges and expand access to vocational, transfer, basic skills, and life-long learning programs among all populations in the greater Los Angeles area, including those that have been traditionally underserved.

Goal 2. Success: Enhance all Measures of Student Success
Help students identify and achieve their educational goals—including transfer to four-year institutions, job and career preparation and placement, basic skills improvement, and life-long learning.

Goal 3. Excellence: Support Student Learning and Educational Excellence
Place student learning at the center of all District endeavors by transforming LACCD colleges into vibrant learning communities that offer challenging, student-centered courses and programs taught in a variety of “state-of-the-art” modes of delivery by engaged, professional faculty who expect the best from themselves and from their students.

Goal 4. Accountability: Create A District-wide Culture of Service and Accountability
Foster a culture of service and accountability across the District that maximizes the ability of our colleges to act as highly-effective and efficient independent entities while simultaneously capturing the benefits of being a large, multi-college district.

Goal 5. Collaboration & Resources: Explore New Resources and External Partnerships
Strengthen external partnerships at all levels in order to enhance political support for District initiatives, expand District financial resources, and improve District relationships with all communities in the greater Los Angeles area so that LACCD colleges can offer more responsive, relevant, and affordable educational programs and support services.
Long-Term Goals Exercise

1. Write down up to 5 long-term goals you want to see the Institute accomplish in the next 5 years
Short-Term Goals Exercise

1. Write down up to 5 short-term goals you want to see the Institute accomplish in the next 1-2 years or sooner.
Collective Creation of Long and Short-term Goals

1. We will share our long and short-term goals.
2. Narrow down our goals those we agree (5 long-term and