Strategic Planning for a Coordinated Resource Development Culture

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Ellucian
To receive CPE credit you must:

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You must be in the session for a **MINIMUM of 75 minutes** to receive credit.
Learning Objectives

- Learn strategies to optimize a cross-organization approach for resource development and compliance with federal, state, and local granting agencies.
- Apply key principles to your organizational planning process to infuse a broader approach across departments and stakeholders.
- Recognize barriers that can impede a coordinated effort aligned with institutional priorities.
Who We Are

Rebecca Davis
Manager, Research and Grants

Karla Zahn
Senior Grants Specialist
Agenda

- Background
- Strategy Development
- Organizational Development & Culture
- Barriers and Challenges
- Creating Synergy
- Theory to Practice
- Summary and Questions
Background
Resource Development Projects

Auto Technology Center
Promise Program

Health and Wellness Complex
Access to Technology
Leaders in Resource Development

Foundation or Research Development

Office of Sponsored Programs or Grants Administration
The Importance of a Shared Vision...
Strategic planning is a process that seeks to clarify what an organization is, what it wants to be, and how, specifically, the organization can successfully make the transition from current to future state.
Why Plan Strategically

Proactive vs. Reactive
- Known programs and opportunities
- Dynamic system to respond to changing priorities
- Reinforces interdepartmental collaboration

Decision-Making Support for Organizational Investments
- Supports staffing plans
- Existing programs versus new initiatives
- Organizational commitments

Develop a Grant Seeking Culture Across Your Organization
- Processes and procedures
- Program staff and/or faculty development
- Reporting and compliance
Strategy for Decision Making

- Identifies priorities for planning purposes
- Complements organizational mission and vision
- External funding aligned with organizational priorities
- Guides activities
- Supports compliance efforts
Priority Identification for a Broader Approach

- Internal review of programs, needs, and capacity
- External needs assessment
  - Incorporate feedback from stakeholders
  - Programs and potential impact
- Gaps Identified will highlight opportunities
Strategic Leadership Skills

Anticipate
Challenge
Interpret
Decide
Align
Learn

*Strategic Leadership: The Essential Skills*
Organizational Development & Culture
‘Culture eats strategy for breakfast’
- Peter Drucker
Culture will grow organically, unless shaped purposefully.
Culture can be changed, but it requires tenacity.
Culture can influence the way people talk, think, and act.
Culture can be transformed through initiatives and programs funded from grants.
Challenges to Culture Transformation

- Complacency and habits
- Lack of coordinated leadership
- Lack of short-term success
- Failing to reinforce and anchor change
A team is ... a group of people with complimentary skills who can commit to the goal and hold each other accountable individually and collectively.
Tuckman Model of Team Development

Forming
Storming
Norming
Performing
Adjourning
Project Plan is Key

Year 01
- Set Goal
- Communicate
- Establish Revenue Streams
- Research Grants

Year 02
- Donors
- Fundraise
- Grant Development
- Grant Writing

Year 03
- Project Launch
- Plan-Do-Check-Act

80/20 Rule, 80% Planning 20% Execution

Pareto Principle
Example of Project Plan: Auto Technology Center

- Facilities
- Staffing
- Equipment
- Curriculum Revisions

Auto Technology Center
Barriers and Challenges
Four Barriers to Strategy Execution

10% of Organizations Implement Strategy

Barriers to Strategy Execution

Vision  People  Management  Resources

Lack of Partnership

- **Cooperation**
  Do not hinder
  Minimal support

- **Collaboration**
  Share ideas
  General support

- **Partnership**
  Co-ownership
  Shared investment
Example of Strategic Execution: Promise Project

Strategy

Tactics
Example of Strategic Partnerships: Health & Wellness Complex

- Building Complex
- Technology & Equipment
- Diversified Revenue Streams
- Academic Infrastructure

Health & Wellness Complex
Creating Synergy
What Is Synergy?

... a mutually advantageous conjunction or compatibility of distinct business participants or elements (such as resources or efforts).

"The whole is greater than the sum of its parts" expresses the basic meaning of synergy.
Summing Up the Parts

Team - Culture - Performing

Communicate - Internal - External

Resources - Revenue - Partnership
Theory to Practice: Group Activity
Big Picture: Access to Technology

Community and Targeted Group Needs

Education

Infrastructure

Financial Resources

Industry & Workforce Development
<table>
<thead>
<tr>
<th>Partner</th>
<th>Needs</th>
<th>Goal</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Boys &amp; Girls Club</strong></td>
<td>Afterschool students needing homework help and online access</td>
<td>Afterschool activities; internet access</td>
<td>State K-12 grants</td>
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<td></td>
<td>for student home</td>
<td>Private donors</td>
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<tr>
<td>**Local College/University</td>
<td>Provide college-level credit to high school students without having to</td>
<td>Deliver college-level coursework via</td>
<td>USDA DLT grant</td>
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<td>&amp; High Schools</td>
<td>travel long distances</td>
<td>livestream in local high school</td>
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<td><strong>Mental Healthcare Clinic</strong></td>
<td>Improve quality of life and employability for individuals recovering</td>
<td>Provide opportunities for recovering</td>
<td>Healthcare industry</td>
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<td>from substance abuse</td>
<td>individuals to gain new employment</td>
<td>State social service grants</td>
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<td>skills</td>
<td>DOL; SAMHSA; NIH; HRSA</td>
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Take 5-10 minutes to brainstorm at your table

1. Assessment of Need
2. Strategic Planning
3. Culture
4. Project team
5. Project plan
6. Revenue streams
Group Activity: Report Out

1. Assessment of Need
2. Strategic Planning
3. Culture
4. Project team
5. Project plan
6. Revenue streams
Logic Model: A Tool for Planning

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Activities</th>
<th>Responsibility</th>
<th>Time Frame</th>
<th>Evaluative Measures</th>
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Summary and Questions
Key Take-Aways

- Strategy
- Culture
- Barriers
- Synergy
Questions

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