

AdCare Educational Institute of New England

Certificate In Operational Management:

Strategic Planning and Project Oversight

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Horizontal lines for notes

Objectives/Goals

- Describe the steps in a strategic planning process
Name two ways to ensure a strategic plan is flexible enough to respond to rapidly changing conditions, while remaining true to the organization's mission
Learn how strategic plans can be effectively implemented using project management tools

Horizontal lines for notes

AGENDA

Table with 2 columns: Time and Activity. Rows include Welcome/Objectives, Strategic Planning process, BREAK, Report Out, LUNCH, and END.

Horizontal lines for notes

Who is here?

- Your Name
- Your Hometown
- Sector(s) you most closely work with:
 - Prevention
 - Intervention
 - Treatment
 - Recovery

Strategic Planning

- **Vision:** where do we want to be? What do we want to create?
 - **Mission:** What is our business? Reason for Being.
 - **Goals and Objectives:** What do we want to accomplish? When?
 - **Strategy:** How are we going to do it?
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- Marketing Plans
 - Financial Plans
 - Business Plans
 - Scenario Analysis

SWOT



Adaptive Strategic Planning Process (ASP)

Key Assumptions:

- No Single Source of Change
- Environment is complex and changing
- Org learning requires interaction
- Differences are a primary source for creativity and innovation



Adaptive Strategic Planning Process (ASP)



- Identify Stakeholders who will provide the most useful information and different perspectives
- Identify and describe the feedback loops – who and how?
- What perspectives are missing?

Adaptive Strategic Planning Process (ASP)



- What are the Drivers of Change for our organization?

External World:

- Social, political, economic, technological, demographic, legal, regulatory

Marketplace:

- Client/Customer expectations-products, services, quality, speed, price?
- What are the important unmet needs of our clients?
- What are the emerging threats?

Adaptive Strategic Planning Process (ASP)

Vision and Values

- What is the organization doing, how is it serving its customers?
- Who are our customers?
- What are our key products and services?
- What does the organization believe in hold vital to its success?

Adaptive Strategic Planning Process (ASP)

Emergent Goals & Strategies

- What actions will best address emerging customer needs?
- Reflect the translation of vision and values.
- What is the fit with the organization?
- Goals are Outcome-oriented and measurable; address products, services, and processes.
- Strategies address how a goal will be achieved.

Adaptive Strategic Planning Process (ASP)

Create Adaptive System

- Identify organization's core competencies.
- Assess organizational culture for ambiguity and change.
- Create communication loops that create a culture of learning.
- Create roles and responsibilities to carry out frequent and useful communications and feedback.

Application Activity: Adaptive Strategic Planning- NEIAS

- Form two groups to address the following environmental assessment questions for Adcare Educational Institute of New England:

Group A	Group B
What are the most important needs of our clients? Emerging Opportunities?	What are the emerging threats?

- Each group will report out their results
- Each person will vote on the issues you believe are most important

Emergent Goal and Objective Setting

Goal Statements

- Can affirm, support, or restate existing goals.
- Focus on Customer wants and needs.
- Can address internal organization development and processes.
- Be outcome oriented, 'measurable' and not too restrictive.

Goal Statement Example:

Identify the unmet workforce development needs of substance abuse professionals in New England. Produce a report by January 1, 2019 identifying and prioritizing those needs and recommendations for which needs AdCare Educational Institute of New England can address and how.

Emergent Goal and Objective Setting

Strategy Statements

- Will describe how a goal will be achieved
- May be developed without full and complete information
- May be changed, or dropped, if not working or new considerations become known
- Changing strategies must balance the need to change and be flexible with giving established strategies the time to work.

Strategy Examples:

- Develop a web-based customer survey
- Conduct focus groups with customers
- Determine what survey information currently exists

AdCare Educational Institute of New England

Our Mission

The mission of AdCare Educational Institute is to advance awareness, knowledge and skills in the prevention, intervention and treatment of substance abuse and related public health issues.

The Institute accomplishes its mission through the development and implementation of high quality, yet affordable training programs and educational events. Activities are offered to individuals and organizations who directly or indirectly encounter problems associated with substance abuse or are affected by other public health issues.

**Application Activity:
Create Emerging Goals and Strategies**

1. Remain in the same two working groups.
2. Group A will create one goal statement that addresses what you believe is the most important emerging opportunity from the list you identified. Create 2 strategies for your goal statement.
3. Group B will create one goal statement to address what you believe is the most important threat. Create 2 strategies for your goal statement.
4. Report out

**Application Activity:
Create Emerging Goals and Strategies**

Discuss:

How clear and measurable is the goal statement?
How well does the goal statement address the opportunity? The threat?

Obstacles to Implementing Strategic Plans

- Limits of command and control
- 'Shifting sands'
- Need to adapt and evolve
- Others?

Introduction to Project Planning and Management

Essentials:

1. Clear, outcome oriented, measurable goals
2. Identification of strategies to achieve the goals
3. Establish specific tasks for each strategy
4. For each task:
 - a. identify person/group who is responsible
 - b. Who else needs to be involved and how
 - c. Resources needed (money, people, and skills)
 - d. Projected Time frame to begin and end each task
5. Establish a project monitoring and reporting mechanism; frequency of reporting; determine who and what reporting is for.

Sample Goal Statement:
Identify Workforce Development Needs of Substance Abuse Professionals in New England. Produce a Report by January 1, 2019 identifying and prioritizing those needs and recommendations.

Sample Strategy:
Identify who to survey; Develop a web based survey tool.

Task
Create ad hoc planning committee
Determine survey questions to be asked
Determine who to survey
Research/recommend a web based Survey instrument or tool
Purchase Instrument
Conduct Survey
Analyze results
Prepare written recommendations
