Strategic Visioning in Four Steps

Southeast Service Cooperative
Rochester, MN
Mission: We mobilize resources, add value, and promote continuous improvement through member-focused solutions.
Good Planning Matters
Traditional Planning Model

• Start with what is
• Try to predict the future
• Look for opportunities and threats in the present
• Accept incremental change
Design Model

• Start with what you would have now if you could have what you want
• Try to create the future you want
• Understand how the present locks you in
• Produce order of magnitude change
Systems Planning – 3 Phases

1. Understand the Set of Problems
   - Interconnected
   - No right answer
   - As important as generating solutions

2. Envision the Preferred Future
   - Participation
   - Exciting!
   - No constraints

3. Strategically Plan for Implementation
   - Short-term wins
   - Remove obstacles for long-term wins
   - Leadership is essential
Strategic Visioning in 4 Steps

**Step One:** Core Values

**Step Two:** Context Mapping

**Step Three:** Big Questions

**Step Four:** Bold Steps
Step One

Determine Core Values
Organizational Core Values

- Core values form the foundation on which we perform work and conduct ourselves.
- We commit to abide by our core values, no matter what changes occur.
- Values underlie the decisions we make regarding strategies to fulfill our mission.
### Business Needs Scorecard

The Business Needs Scorecard (BNS) provides a business assessment of current and expected trends to help guide organizations in developing strategies that will be successful in today’s fast-paced environment.

### Desired Culture Values

<table>
<thead>
<tr>
<th>Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovation</td>
<td>Continuously improving processes and procedures</td>
</tr>
<tr>
<td>Learning</td>
<td>Encouraging employees to learn and develop new skills</td>
</tr>
</tbody>
</table>

### Current Culture Values

- **Executive Leadership**: Values of integrity, trust, and accountability are emphasized.
- **Communication**: Open and transparent communication is maintained.
- **Innovation**: Encourages creativity and new ideas.

### Values Type

- **Monitory**: Values are set in place and monitored for adherence.
- **Cultural**: Values are deeply ingrained in the organization's culture.

### Individual Values Assessment

<table>
<thead>
<tr>
<th>Value</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrity</td>
<td>4.5</td>
</tr>
<tr>
<td>Teamwork</td>
<td>4.2</td>
</tr>
<tr>
<td>Communication</td>
<td>4.0</td>
</tr>
<tr>
<td>Flexibility</td>
<td>3.8</td>
</tr>
<tr>
<td>Leadership</td>
<td>3.6</td>
</tr>
</tbody>
</table>

### Barrett Values Centre

Visit www.valuescentre.com for more resources and tools to assess and improve organizational culture.
Barrett Levels of Consciousness

1. **Survival**
   - Satisfying our physical and survival

2. **Relationship**
   - Feeling protected and loved

3. **Self Esteem**
   - Feeling a sense of self-worth

4. **Transformation**
   - Letting go of fears.
   - The courage to develop and grow

5. **Internal Cohesion**
   - Finding meaning in existence

6. **Making a Difference**
   - Making a positive difference in the world

7. **Service**
   - Self-less service

8. **Common Good**

9. **Self-Interest**

10. **Transformation**

11. **Self Esteem**

12. **Relationship**

13. **Survival**

14. **Service**

15. **Common Good**
# Core Organizational Values

<table>
<thead>
<tr>
<th>Accountability</th>
<th>Leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement</td>
<td>Lifelong Learning</td>
</tr>
<tr>
<td>Adaptability</td>
<td>Open Communication</td>
</tr>
<tr>
<td>Citizenship</td>
<td>Passion for Service</td>
</tr>
<tr>
<td>Collaboration/Cooperation</td>
<td>Respect</td>
</tr>
<tr>
<td>Commitment</td>
<td>Responsibility</td>
</tr>
<tr>
<td>Community</td>
<td>Responsiveness</td>
</tr>
<tr>
<td>Continuous Improvement</td>
<td>Results</td>
</tr>
<tr>
<td>Diversity</td>
<td>Risk-Taking</td>
</tr>
<tr>
<td>Equity</td>
<td>Self-Regulating</td>
</tr>
<tr>
<td>Excellence</td>
<td>Stewardship</td>
</tr>
<tr>
<td>Innovation</td>
<td>Strong Relationships</td>
</tr>
<tr>
<td>Integrity</td>
<td>Other</td>
</tr>
</tbody>
</table>
Come to Consensus

• **Integrity.** We carry out our work with a high level of responsibility, accountability, and ethics.

• **Excellence.** We are forward-thinking, efficient, effective, and highly competent.

• **Relationships.** We facilitate collaboration with respect and passion to serve.
Step Two

Understand the Set of Problems
Context Mapping

• Understand the factors, trends and forces at work in your marketplace and unique web of relationships.

• Create a snapshot of the present environment.

• Acknowledge what you cannot control and then focus on what you can.
CUSTOMER NEEDS

Education
- Educator evaluation support
- Retaining students
- Staff development
- Leadership development
- Teacher licensure
- Technology demands
- Improving achievement (changing demographics)
- School safety and security
- Standards alignment

Government Agencies
- Develop capacity
- Staff development
- Understanding mandates
- Innovation in collaboration and continuous improvement
- Involve community and stakeholders in collaborations and partnerships that are mutually beneficial

Bottom line: How to balance internal and external demands for accountability, increased productivity, higher achievement, and greater efficiency in the current budget climate.
How do these context factors affect us?
Step Three

Know Your Big Questions
Big Questions

- Are thought provoking.
- Challenge assumptions.
- Generate energy.
- Focus inquiry and reflection.
- Touch a deeper meaning.
- Evoke related questions.

Juanita Brown, David Isaacs, Nancy Margulies, *Asking Big Questions: A Catalyst for Strategy Evolution*
Developing Big Questions

• Based on the context in which you operate, begin to identify issues so significant that a response is necessary for future success.

• What questions do you need to answer in order to move from good to great?

• What will happen if you don’t address these key questions?
Developing Big Questions

- **Individually:** Quietly, jot 3-5 questions and post.
- **Small Groups:** Still silent, arrange all questions into categories.
- **Full Group:** Discuss, re-group, name categories, formulate over-arching question for each category/theme.
How will SSC balance and diversify funding to support organizational sustainability with high-quality staffing?

How will SSC build capacity to innovate in ways that serve our members most effectively?

How will SSC enhance collaborations and increase partnerships to facilitate value-added access for our members?

How will SSC ensure that programs and services meet member needs and are assessed in an ongoing and effective manner?

How will we maximize competitive advantages and most effectively communicate our value to the people we serve so that they access services to the fullest potential?
Envision the Preferred Future

Step Four
Bold Steps

• Link a strong vision to immediate steps.
• Ground our vision in specific initiatives.
• Offer a springboard for action planning.
• Drive creative action that helps us go a step beyond our daily objectives.
Forming Bold Steps

- **Individually**: Reflect on context map and big questions, write 2 or 3 actions
- **Small Groups**: Brainstorm potential Bold Steps
- **Full Team**: Determine 4 to 5 Bold Steps and come to consensus
A vital question, a creative question, rivets our attention... the creative power of our minds is focused on the question.

The sunburst area is for the vision or purpose of the organization. It provides a focus and direction. It might be the central mission or reason for being.

**BOLD STEPS are the top-priority strategies or initiatives that need to be implemented in order to realize the vision.**

**VALUES** are those qualities and behaviors most highly regarded by the group that will support forward movement. They are the foundation, or the essential tenets, of any organization.

**SUPPORTS** are trends or factors in the environment that support the five bold steps and the group’s direction.

**CHALLENGES** are the factors in the environment that inhibit or impede group action and progress. Listing these factors and making the group aware of them diminishes their threat. Identifying challenges can also spark ideas for bold steps.
Mission Statement
We mobilize resources, add value, and promote continuous improvement through member-focused solutions.

Core Competencies
- Collaborative culture
- Customer focused service design
- Intentional agility

2015-2017 BOLD STEPS
1. Develop and implement strategies to meet members where they are by facilitating face-to-face connections.
2. Clarify, simplify, and individualize SSC messaging, speaking to unique member needs.
3. Create a development and innovation specialist position to strengthen SSC’s capacity to provide sustainable, value-added programming.
4. Inventory and document key work processes to systematically evaluate and improve.
5. Identify key metrics for organizational and program/service data collection.
6. Translate data for problem solving, decision-making, service design, and process improvements.
7. Develop and deploy a systematic process to strengthen the impact of internal professional development.

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CORE VALUES
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Good Planning Matters
Other Tools We Use
Metrics That Matter

Get all the information you can, we'll think of a use for it later.
Customer Touch Points

Static
- Programs
- Services
- Contracts
- Materials
- Facilities

Brand
- Word-of-Mouth
- Staff
- Workshops
- Welcome
- Support
- Service

Digital
- Email
- Social Media
- Website
- ORS
- Evaluation

Customer Experience
Customer Journey Mapping
Impact & Effort Matrix

Worksheet #2: Setting Priorities

- Easy
  - For future consideration
  - Quick Wins

- Difficult
  - Take off the Table
  - Longer Term Solutions

Impact on the Client Experience

Low

High
LUMA INSTITUTE™

We equip individuals, teams and organizations to accelerate innovation.
Statement Starters

An approach to phrasing need statements that invites broad exploration.

If you want the best solutions, start by asking the right questions. Critical thinkers are adept at uncovering what the central focus of exploration ought to be, rather than accepting a situation as given. By using phrases that encourage broad thinking, statement starters leave room for multiple interpretations of the challenge, thereby increasing the possibility of finding new and better solutions.
Affinity Clustering

A graphic technique for sorting items according to similarity.

Professor Herb Simon said, “Most of the complex structures found in the world are enormously redundant, and we can use this redundancy to simplify their description.” Sometimes in the midst of planning, an overwhelming amount of information or ideas can bog down the pace of progress. When teams sort items based on perceived similarity, they define commonalities that are inherent but not necessarily obvious.
Bull’s-eye Diagramming

A way of ranking items in order of importance using a target diagram.

When working on a project, it is natural to think that all ideas, tasks, or features are of equal importance. But to truly hit the bull’s-eye with your design, you have to recognize what matters most to people, and aim for that as your goal. It will help ensure effectiveness by carefully considering what is critical, what is important, and what is peripheral. This helps you prioritize so you can focus on the essentials and subordinate the rest.
Walk-a-Mile Immersion

A way of building empathy for people through firsthand experience.

As Atticus Finch teaches us in *To Kill a Mockingbird*, “You never really understand a person until you consider things from his point of view – until you climb into his skin and walk around in it.” This activity enables us to experience our customer’s journey and pinpoint what makes things easier for them and what creates challenges or confusion. We must not only *see*, but also *feel* what that experience is like.
Rose, Thorn, Bud

A technique for identifying things as positive, negative, or having potential.

Members of the Boy Scouts of America are taught to be thorough, methodical, and analytical about each situation they encounter. In turn, Scouts are routinely encouraged to identify one positive experience (Rose), one negative experience (Thorn), and one new goal or insight (Bud). Adapted for use as a design tool, this structure help reveal focus areas, allowing you to plan next steps.
Contact Me

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