

# Strategic Planning for Facilities Professionals

Federal Facilities Council

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# Outline of Today's Talk

- Define and discuss strategy
- Diagram strategic planning – visualize the process
- Where does Facilities fit in?
- An example from Hillwood's plan
- Comments from a peer

# What is Strategy?

- An **integrated** plan to capitalize on an institution's strengths and mitigate its weaknesses to achieve its mission
- Targets specific audiences
- Considers institutional resources
- Creates staging – what steps are needed in what sequence?
- Not generic!

# Strategy: choices that Create Fit

- **Economic Fit**, analyze the industry and competitive environment and the organization's resources and capabilities (How do an organization's resources and capabilities contribute to its position in the industry and to competitive advantage?)
- **Cultural Fit**, stakeholder perceptions and the mission and vision
- **Strategy creates fit between Cultural and Economic choices**

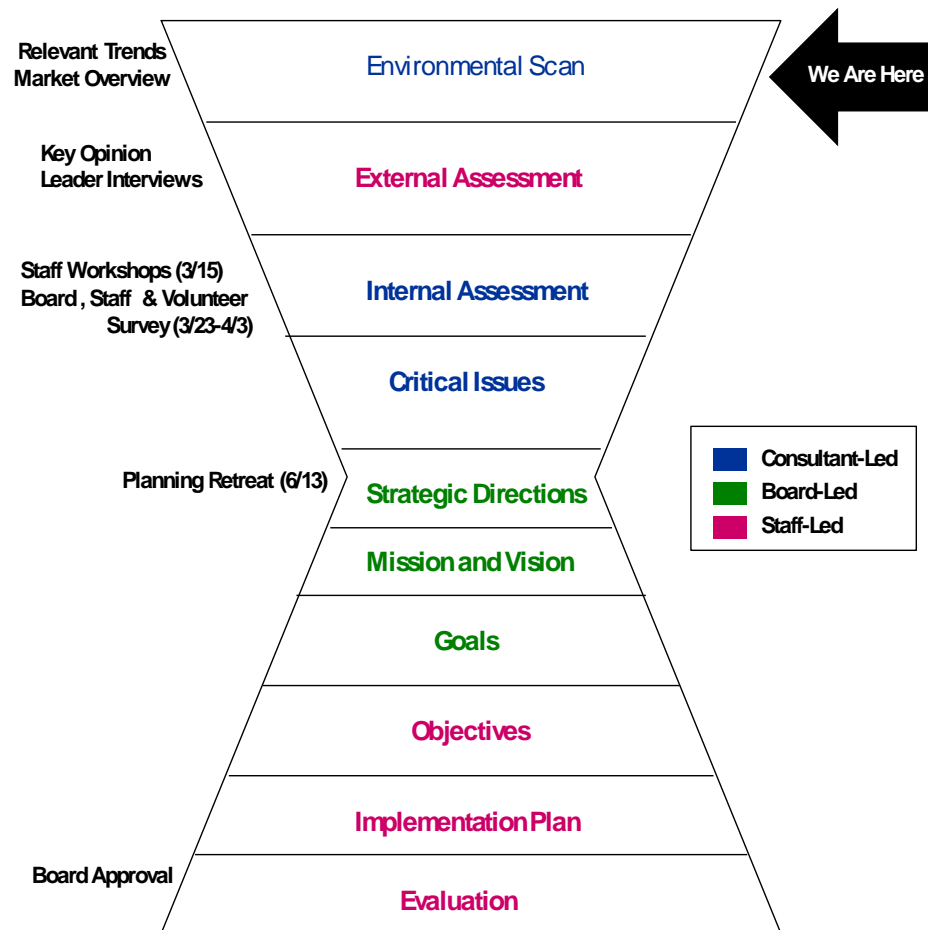
# Evaluating and Formulating Strategy

- Assess the environment
- Identify strategic problems and opportunities
- Examine Vision, Mission, Resources, Capabilities
- Generate and assess alternatives
- Develop an action plan for stronger competitive advantage
- Implement

# There's a difference between Strategy and Strategic Planning

- Good strategy does not have to derive from a major strategic planning process
- But there are many benefits to organizing a thorough process, especially in public institutions: greater awareness and understanding across the institution and within the larger community; increased staff morale; excited donors, etc.

# Strategic Planning Process



# Who should be involved in planning?

- Usually Board-led, with the institution's director
- Involves senior staff at the steering committee level
- Very broad based at the information gathering level – important to involve key stakeholders: staff at all levels; members; donors; volunteers; public; colleagues



# Important Principles

- Confidentiality – no attribution
- Transparency – show how the process works and share findings
- 360 degree perspective – get info from everyone
- Integrity – conclusions from data
- Alignment – across the institution

# Where does Facilities fit in?

- Chief Facilities Officer typically is part of the senior management team, or reports to one
- Facilities issues are critical to the future of our institutions (and expensive!)
- New Facilities generate excitement among donors
- Current facilities need to be kept updated and this needs to be emphasized in the plan

# Hillwood's Facilities Objectives

## September, 2011 Plan

- With professional help, by the end of 2012, develop a workable short term plan for making best use of current facilities and planning affordable improvements that will enhance the efficiency and effectiveness of the entire campus

# Facilities objectives, continued

- Ensure best immediate and short term utilization of all buildings and outdoor spaces for both staff and visitors
- Maintain or exceed the standards set forth by MMP for the upkeep of all structures and systems
- Ensure that all areas and spaces meet current standards of best practice for offices, meeting spaces, storage, object conservation, preparation and exhibition, retail, and café

# What value can you add?

- Understand and participate in the process
- Volunteer for staff sessions
- Provide information
- Offer alternatives, ideas to solve problems
- Listen carefully
- Be a good colleague/team player
- Do your assignments on time!

# Comments from a Colleague

- Don Rogers, Hillwood's Director of Facilities, is a member of the senior management team and participated in the board retreat and staff discussions, his first time in this role