Strategic Planning for Facilities Professionals

Federal Facilities Council

June 27, 2012
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

Environmental Scan

External Assessment

Internal Assessment

Critical Issues

Strategic Directions

Mission and Vision

Goals

Objectives

Implementation Plan

Evaluation

Relevant Trends
Market Overview

Key Opinion Leader Interviews

Staff Workshops (3/15) Board, Staff & Volunteer Survey (3/23-4/3)

Planning Retreat (6/13)

Board Approval

We Are Here

Consultant-Led
Board-Led
Staff-Led
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