

IL-NET

CIL-NET · SILC-NET

Leading Statewide Strategic Planning

October 7, 2014
3:00 pm – 4:30 pm EST

Presenters:
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Introduction and Objectives

- Differentiate between a SILC strategic planning process and SPIL development
- Describe effective strategic planning that supports inclusion in all processes and full accessibility of meetings and materials
- Describe effective processes for collecting and synthesizing input and setting priorities
- Describe strategies that will engage, support, and follow up with stakeholders to ensure successful implementation of the strategic plan

Have you ever had these situations...?

- Difficulty recruiting new members
- Problems meeting quorum
- Delays or setbacks with negotiating budgets/contracts
- Difficulty with cash flow
- Lack of organizational goals outside of SPIL
- Inability to respond to crisis situations
- Need to layoff/downsize staff

YOU NEED TO BE PROACTIVE!

- These problems are occurring because you are reacting to situations.
- While the SPIL is your primary responsibility, you ALSO have organizational needs!
- SOLUTION: You need to define your organizational needs using **Strategic Planning Methods**.

SILC Strategic Planning – 2 Aspects

- SPIL Development
- SILC Strategic Plan Development

Isn't the SPIL a Strategic Plan?

- Yes, but the SPIL is a plan for IL in your state – not for the SILC. It works toward building the IL Network.
- A SILC Strategic Plan is specifically to:
 - Achieve the SILC mission
 - Support the growth & development of the SILC as an organization
 - Direct the work of the SILC outside the SILC's SPIL responsibilities

Impact of WIOA on Planning

- Changes to SILC Duties
 - Develop SPIL with CILs (not DSU)
 - Coordination with SRC & others no longer a duty
- Addition of Authorized Activities including:
 - Work with CILs to coordinate services with others
 - Conduct resource development to support SILC activities and/or IL services by CILs
 - Perform such other functions, consistent with the purpose of this chapter and comparable to other functions described in this subsection, as the Council determines to be appropriate

How Does WIOA Affect SILC Planning

- SPIL planning process
 - SPIL Developed by SILC & CILs
 - SPIL signed by SILC Chair, at least 51% of CIL directors, and the director of the designated state entity
 - Should include how SILC will accomplish duties & authorities
- SILC Strategic Planning
 - Coordinate organizational strategies with duties and authorities addressed in SPIL

SPIL as a Strategic Plan

- Assesses needs of people with disabilities & gathers input (analysis)
- Includes goals and objectives & how funds will be used to address needs
- Includes input & feedback from others

But – the SPIL is time limited (3 years) & is a plan for the state, not the SILC

Why Strategic Planning in Addition to the SPIL Process?

- SPIL addresses statewide IL needs, which may include SILC, but not in a comprehensive way
- Even though there is a SILC resource plan in the SPIL, it usually addresses basic operation
- Strategic planning will:
 - help to identify organizational development and longer-range needs of the SILC.
 - prioritize key issues not discussed during SPIL development process and allow for other logistical planning related to committees, resources, etc.

Make a Plan for Planning

- Decide who to involve in planning
- Identify stakeholders to gather input from
- Decide methods for gathering input
- Decide on planning process
- Find a time and a place for the strategic planning to occur without interruptions

What Kind of Plan is Needed?

- Plan may vary depending on SILC structure:
 - Non-profit corporation
 - Informal organization supported by DSU
 - Other?
- Mission and Vision affect detail and time frame for the plan
 - What you want to accomplish will impact how long it will take and the detail of the planning

Is a Facilitator Necessary?

- An outside facilitator is strongly recommended:
 - To provide expertise in directing the strategic planning process
 - To allow all SILC members, staff & stakeholders to participate fully
 - To provide impartial direction through the process & to mediate stressful discussions

Resolving Disputes

- Identify areas of agreement
- Identify common goals
- Allow for negotiation and give & take on how to accomplish goals
- Have a facilitator to mediate the discussion and reach resolution

Questions & Answers

SILC Organizational Snap Shot Assessment Tool

- WNYIL (Buffalo, NY-formerly RRTC in IL Management) created Organizational Snap Shot for SILCs.
- Collects important organizational information about SILCs as well as compliance data.
- Helps to expose areas that need addressing (strengths and weaknesses), what could be referred to a committee for work, and need for potential resources.
- Identifies key information going into a strategic planning process.

SILC Organizational Snap Shot Assessment Tool, cont'd.

- “Snap shot” takes picture of how SILC exists today.
- This strategic planning tool is divided into 9 management categories:
 - Organizational Culture, Administrative Management, Physical Plant Management, Governance/Board, Financial Management, Human Resource Management, Program and Services, Community Relations, & Sample SILC Budget.
- Overall, it allows you to examine how the SILC is doing in each of these areas.

SILC Organizational Snap Shot Assessment Tool, cont'd. 2

Process:

- Begin at least 2 months prior to meeting with facilitator
- Share results of completed snap shot with full council in advance of meeting
- Allow people to review the information to identify gaps, potential goals, etc.
 - Not all members equal (time/experience, etc.).
- Apply a timeline (5 years) to be able to address issues, view progress, and provide for turnover of council.
- Compare current snap shot to new one in 5 years.

Need for External Input

- External information should also be gathered about the SILC.
- External perceptions and realities:
 - Could reflect internal perceptions & realities
 - More likely will give you a better understanding of the differences—how your organization is viewed by partners, the public, & other stakeholders.

Formats for Gathering Input

- Public Comments
- Focus Groups
- Facilitated Discussions
- Survey Results
- Needs Assessment Results

Questions & Answers

New York SILC Experience

- Conduct SILC Snap Shot and share findings
- Obtain external input
- Conduct strategic planning session and share materials in advance
 - Peter Drucker Self Assessment Tool exercises
 - Albert Humphrey SWOT Analysis
- Prioritizes important elements of a strategic plan

Exercise #2: Humphrey SWOT Analysis

- SWOT stands for strengths, weaknesses, opportunities, and threats. The assessment provides a quick overview of organizational dynamics.
- Helps to identify strengths and opportunities from which to build. Identifies weaknesses and potential threats, and determines if the threats are real and controllable, or uncontrollable.
- Issues and goals usually come from strengths to build on, weaknesses to be strengthened, opportunities to be taken, and threats to be avoided.

Exercise #2: Humphrey SWOT Analysis, cont'd.

- Looked at in relation to organization's life cycle. As organizations change and grow from start-up phase, to growth phase, through governance phase, and onto institutional phase, they develop certain characteristics which can be both positive and negative, and require different management and leadership abilities.
- Based on information identified in SILC Organizational Snap Shot, and personal experience related to the council, the group is encouraged to generate a list of up to 5-10 items per SWOT area.

Exercise #2: Humphrey SWOT Analysis, cont'd.

- **Strengths**

- Committee structure/functional
- Conduct good studies/surveys/reports

- **Weaknesses**

- Lack of resources
- IT infrastructure outdated

- **Opportunities**

- Maximize use of website
- Access ARRA funds to replace outdated IT

- **Threats**

- Lack of funding diversity
- State budget cuts

Exercise # 3: Drucker Worksheet 1

- What is the current mission statement?
- Does the mission statement need to be replaced?
- New mission statement:
- Mission guidelines:
 - Purpose of the organization (who you are and what you do.)

Exercise # 4: Drucker Worksheet 1A

- What is the current vision statement?
- Does the vision statement need to be replaced?
- New vision statement:
- Vision statement elements:
 - Compelling, global—inspires commitment and action and the impact to aspire to achieve.

Exercise #1: Drucker Worksheet 5

- Identify your primary customer.
 - A consumer is a CIL's primary customer, but just who IS a SILC's primary customer?
- Identify your supporting customers.
 - It may include volunteers, members, State Plan partners, funders, and other stakeholders.

Exercise # 5: Drucker Worksheet 15

- Top 5 Priority Goals
 - Identify goals based on top priorities from SILC snapshot, SWOT analysis, external input, consistent with mission and vision.
 - Assign responsibility of each goal to appropriate council committee.
 - Have the committee work on action steps to facilitate progress on the goal.
 - Identify potential resources (if appropriate).
 - Identify a timeframe (up to 5 years).

Outcomes of Strategic Planning

- Clear picture of your organization from the inside/outside
- Updated Mission & Vision Statements
- Identified customers and organizational needs
- Clear goals to work toward with action steps to achieve progress
- Be sure to include newly defined SILC areas under WIOA
- A stronger, more productive SILC!

Resources

- Free SWOT Analysis Template
<http://www.businessballs.com/swotanalysisfreetemplate.htm>
- The Drucker Foundation Self-Assessment Tool, Copyright © 1999 The Peter F. Drucker Foundation for Nonprofit Management, 320 Park Avenue, 3rd Floor, New York, NY 10022. <http://www.pfdf.org>
- Organizational Snap Shot for Statewide Independent Living Councils (SILCs), © 2005 Western New York Independent Living, Buffalo, NY (formerly the RRTC in IL Management).
http://www.ilru.org/sites/default/files/resources/silc/SILC_SnapShot.pdf

Questions & Answers

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Wrap Up and Evaluation

Click the link below now to complete an evaluation of today's program found at:

<https://vovici.com/wsb.dll/s/12291g56eb4>

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