

# The Enable Strategic Plan: *Expanded Management Team Briefing*

**PLC** ASSOCIATES, INC.

*Building People and Organizations*



**enable**  
individualized services  
for children & adults with disabilities

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# Review and Update

- **Components of the Strategic Plan**
  - **Core Team Role**
  - **Task Forces' Work Process**
    - **Results**
- **Communication and Connection**
  - **Your Questions!**

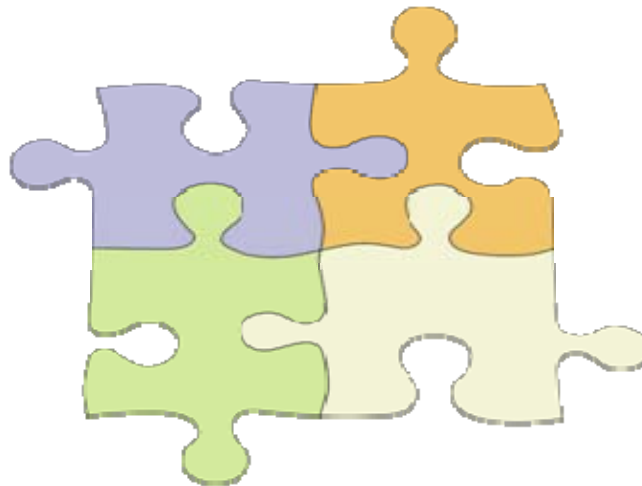
*Good people engaged in common purpose...  
achieve great things.*

# Strategic Plan: The Blueprint!

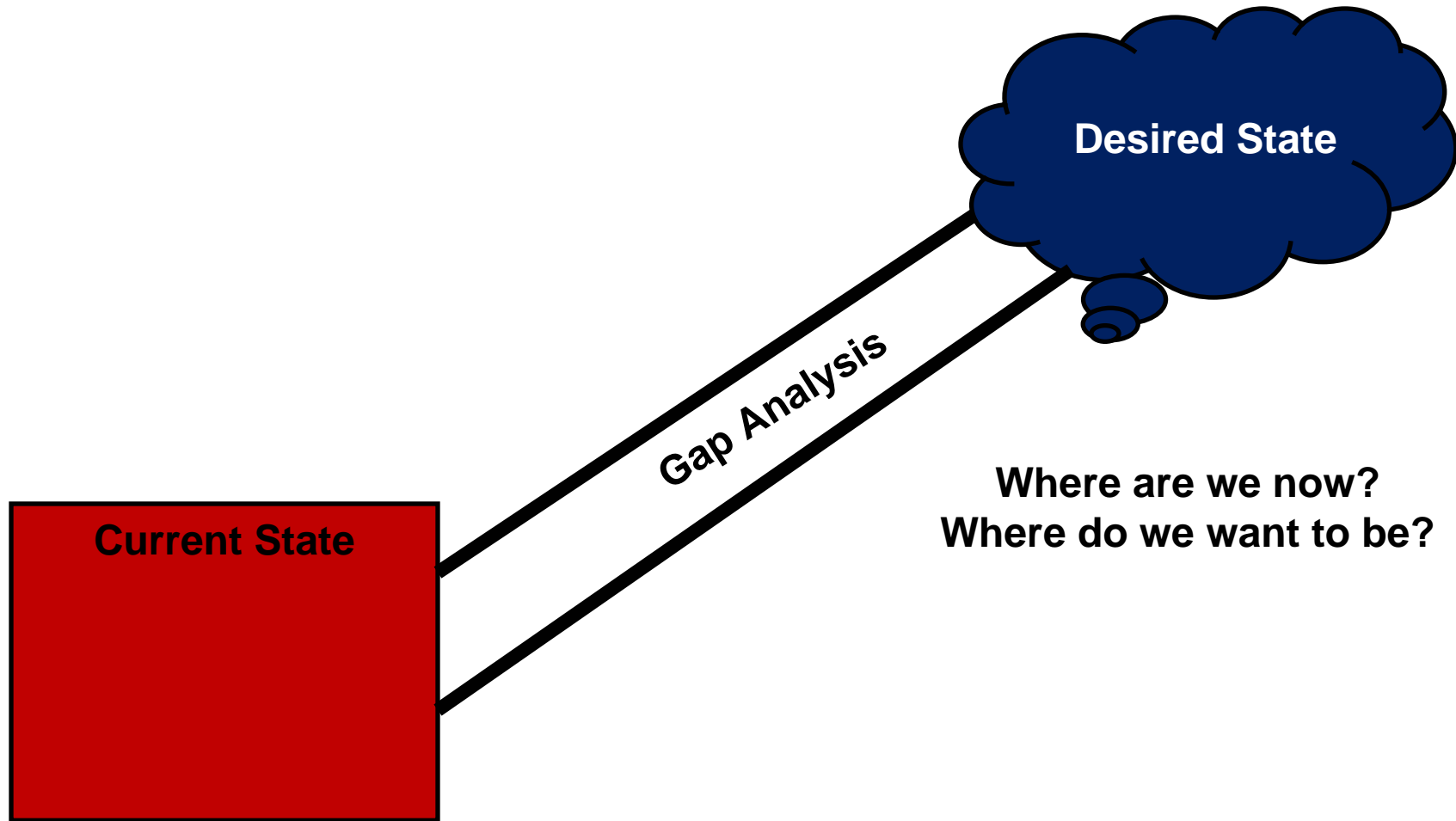
One of the greatest challenges for any organization is **integration**; that is, connecting the all of the components (goals, systems and practices) in a comprehensive manner.

Once both vertical and horizontal alignment is in place, we have a track to “run on.” It’s the people, though, who implement and make the difference.

*Protocols create the path.  
People deliver the results!*



# The Force Field Analysis



# From the Research: Learning Communities

**A most promising strategy for sustained, substantive high performance is developing the ability to function as true learning communities.**

**Richard DuFour and Robert Eaker**  
**Professional Learning Communities At Work**

## **The Characteristics:**

- **Shared Vision, Mission, Beliefs**
  - **Collective Inquiry**
- **Collaborative Teams (Engaged in Critical Work)**
  - **Action Orientation and Experimentation**
  - **Continuous Improvement**
  - **Results Orientation**

# Building Our Strategic Plan

## Clear Strategic Intentions (Goals)

Includes five-year targets across a number of areas.

## Initiatives/Action Plans (Strategies)

Includes the activities/projects/timeline/person(s) responsible.

**Successful Strategic Planning not only builds an outstanding blueprint for success – it also unites our entire Agency in implementation.**

**There is room for everyone!**



# Building It...The Strategic Plan

**Vision**

**Mission**

**Strategic Intent (Goals)**

**Our Six Task Forces**

**Our Principles**

# Key Terms

## **Vision:**

**A compelling description of the desired future state.**

## **Principles:**

**A set of deeply held convictions which reflect core values.**

## **Mission:**

**A focused statement that outlines the purpose of the organization.**

## **Strategic Intent: (SMART)**

**Specific, Measureable, Achievement driven, Result written, Time connected.**

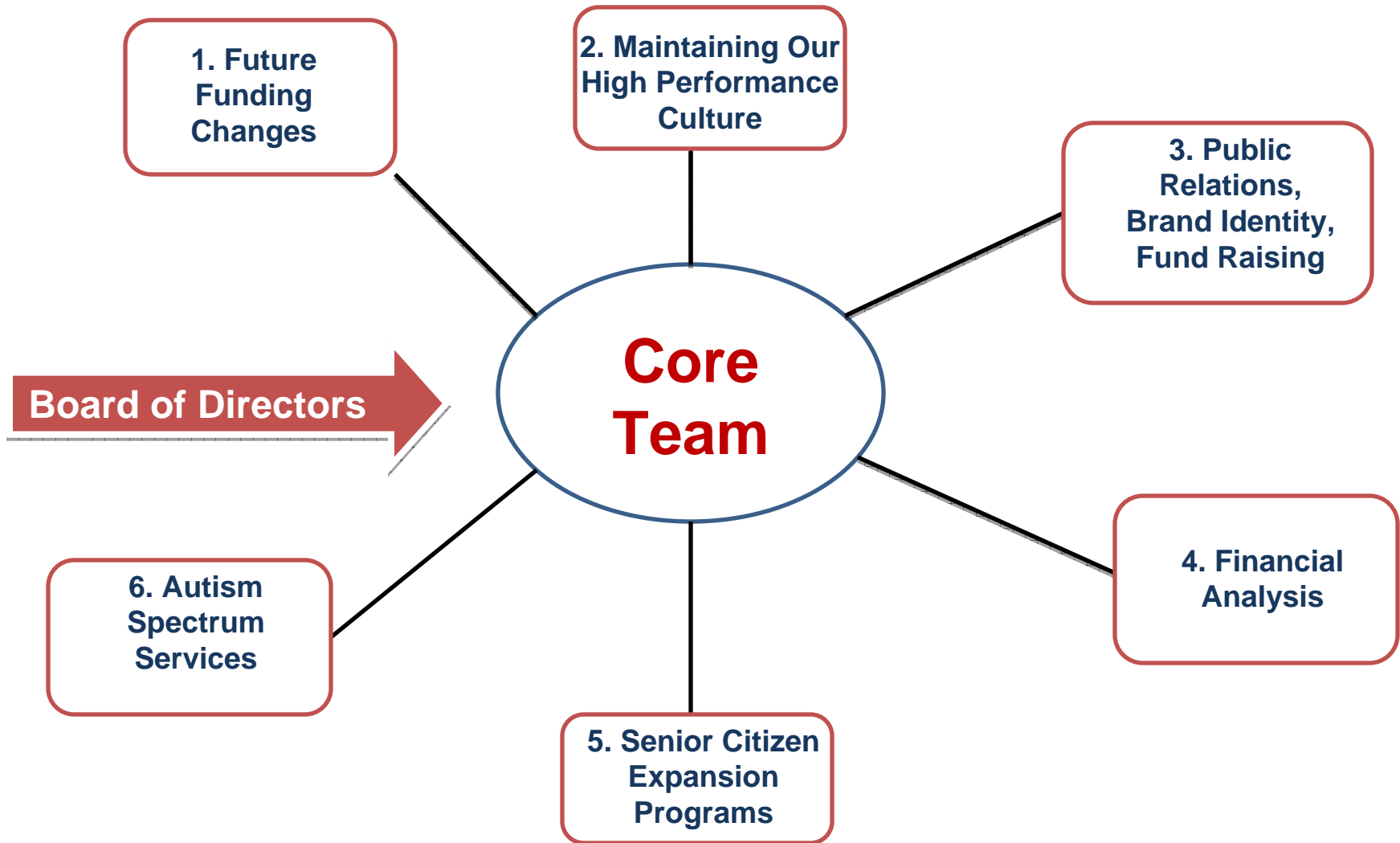
## **Initiatives:**

**Multi year strategies that are supported by detailed Action Plans.**

## **Action Plans:**

**Specific projects within a fiscal year, detailed with person(s) responsible, timeframe, costs.**

# An Integrated Approach



# Task Forces and Co-Facilitators

Task Force	Co-Facilitators
Future Funding Changes	Prudence York and Earleen Foulk
Maintaining Our Performance Culture	Doreen Nelipowitz and Sue Shultz
Public Relations, Marketing, Brand Identity, Fund Raising	Carol Tytler and Art Van Gelder
Financial Analysis	Mike Wolfson and Marvin Reed
Senior Citizen Expansion Programs	Joe Gross and Elinor Fairbrother
Autism Spectrum Services	Phil Grajko and Mary DiBiase

# Task Force Charge/Critical Issues: Example

Task Force	Date	Facilitator
High Performance Culture		

## Charge

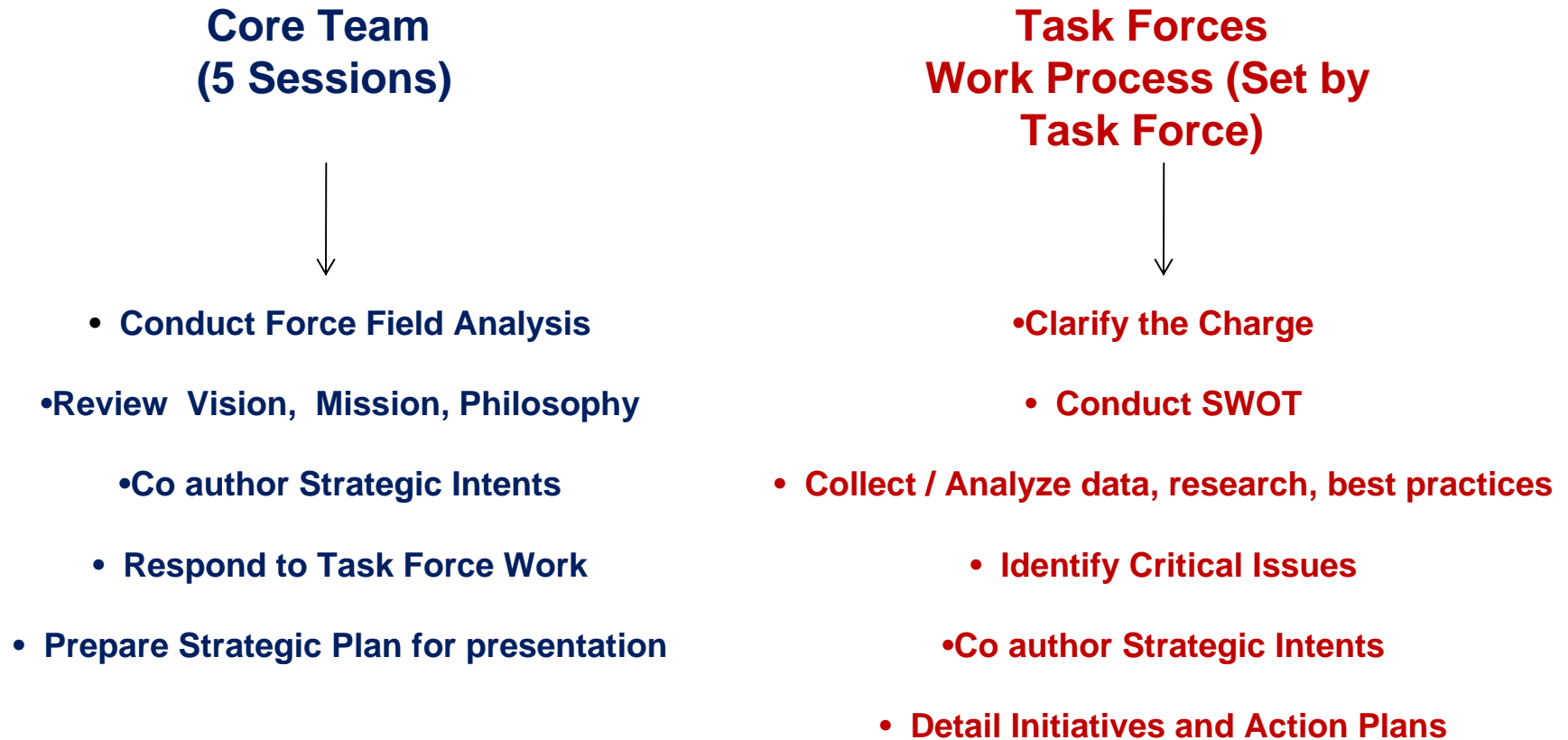
The High Performance Task Force will investigate the Agency culture with attention to the following:

- Creating the conditions that allow staff an opportunity for optimal performance
- Establishing a baseline that may be measured on a regular basis, creating ongoing opportunities for reporting success and making improvements
- Gaining specific feedback on what staff finds motivating and incentivizing
- Investigating the extent to which the Agency is connected to best practices and current, relevant research
- Identifying those elements which will secure and perpetuate a high performing culture

## Our Critical Issues

1. Do we have a protocol which offers a comprehensive, relevant assessment of our culture?
2. How would we evaluate the energy level and enthusiasm of our staff?
3. To what extent do people feel they have the tools and resources to perform optimally?
4. How would you describe staff willingness of to be involved in implementation of our Agency initiatives?
5. Do we benefit from the collective expertise of all?
6. How well do we deal with change, new ideas and innovation?
7. How well do we live our brand? What are some great examples?
8. What other organizations should we benchmark with?

# Beginning Our Work: Let's Start



# SWOT Analysis

I  
N  
T  
E  
R  
N  
A  
L

Does our current plan have Weaknesses (W)? Are there missing pieces?

W

Where does our current plan show Strengths (S)? What is most leveraged?

S

E  
X  
T  
E  
R  
N  
A  
L

Considering outside dynamics (regulations, economics – other factors), what Threats (T) exist?

T

Considering outside dynamics (regulations, economics – other factors), what Opportunities (O) might be available?

O

# Example: Task Force Work Flow

Step	Work Process Description	Target Date
1.	Analyze the Charge; develop broad understanding across the Task Force.	First Meeting
2.	Discuss and begin collecting all relevant data. Include “best practices,” research and data. Invite Subject Area Experts.	
3.	SWOT Analysis/Internal - Discuss Strengths (S) and Weaknesses (W).	
4.	SWOT Analysis/External – Discuss Opportunities (O) and Threats (T).	
5.	Add to Critical Issues as a result of SWOT. Combine, categorize, and prioritize.	
6.	Recommend Strategic Intents to Core Team.	
7.	Begin identification of Initiatives. Get Support (75%) for those that the Task Force is recommending.	
8.	First Draft of all Initiatives to Facilitator (PLC Associates, Inc.). Label First Draft and date.	9/27

# Task Force Workflow

Step	Work Process Description	Target Date
9.	Develop Action Plans for Initiatives.	
10.	Create Cost /Benefit Analysis, as required.	
11.	Prioritization of Action Plans. Recommend Year 1 only.	
12.	Send Second Draft of all Initiatives with Action Plans. Label Second Draft and date.	
13.	Submit Final Work on required templates. Label Final Draft / Certified Copy and date.	
14.	Task Force Facilitators / Selected Members meet with Core Team Facilitator to prepare for Board presentation.	
15.	Official presentation to Board of Directors.	11/18

# Agency Strategic Intents: Examples

## 1. High Performance Culture

By \_\_\_\_\_, we will have 85% of our Performance Benchmarks at the Asset Level (Green) on our Enable Culture Survey.

## 2. Public Relations, Brand Identity, Fund Raising

By \_\_\_\_\_, we will have established over x active partnerships with various organizations, businesses and groups.

## 3. Financial Analysis

By \_\_\_\_\_, we will have reduced and maintained our operating budget to x% of total budget.

## 4. Senior Citizen Expansion Programs

By \_\_\_\_\_, we will have increased our Senior Citizen client base by x% as measured from the baseline year.

## 5. Public Relations, Brand Identity, Fund Raising

By \_\_\_\_\_, we will have increased philanthropic donor base to x with a minimum of \$ annually.

# Build The Data Dashboard

**Strategic Intent:**

## High Performance Culture

By \_\_\_\_\_, we will have 85% of our Performance Benchmarks at the Asset Level (Green) on our Enable Culture Survey.

Year	Baseline	2012	2013	2014	2015	2016
Goal	35%			-		85%
Actual						
Gap						

# Initiatives (TFs)

## Definition:

**Multi-year strategies with supporting Action Plans.**

## Examples:

- **HPC:** We will create a strategy to hire, retain and develop personnel who model and reflect high performance skills and strategies consistent with the Enable Mission.
- **PR:** We will create a communication network that will comprehensively connect the Agency, providing ongoing and timely information regarding our work and results.
- **HPC:** We will align our departmental decision making process with the Strategic Plan and create a consistent planning model for use throughout the organization.
- **HPC:** We will infuse data-driven decision making and current relevant research into all components of our work.

# Action Plans (TFs)

## Definition:

**Projects implemented within a fiscal year, with person(s) responsible, time and costs.**

## Strategic Intent: PR/BI/FR

**By 12/2014, greater than 95% of our staff will Strongly Agree/Agree that we provide the ongoing mediums and tools for them to serve as Agency Ambassadors and promote our positive brand image within the greater community.**

**Initiative:** We will develop the capacity of our internal stakeholders to positively promote the work and results of our Agency.

## Action Plans:

- To provide all employees a workshop in appropriately promoting “brand identity.”
- To create and update our Data Dashboard for use within the Agency and familiarize staff with its use for monitoring success.
  - To gather and post client and family testimonials.
- To create regular opportunities for departments to share success stories, Agency wide.
  - To create the Enable “Elevator Speech” which differentiates us.

# Data, Research, Best Practices



Organizing information use around essential questions proves to be a powerful strategy.

**“The essential-questions approach provides the fuel that drives collaborative analysis.”**

**These are our Critical Issues!**



**Use the Task Force Work Flow: Our 15 Steps  
Caveat: Analysis before solutions!**

# Data, Research, Best Practices

## Data (Qualitative/Quantitative)

- \*Recent Surveys
- \*Archival Data
- \*Demographic Studies
- \*Quarterly / Annual Reports
- \*Evaluations
- \*Focus Groups
- \*Community Cafe

## Research (Studies, reports, articles...)

- \*Exceptional Parent
- \*Ability Magazine
- \*Commission Reports
- \*Other industry specific venues

## Best Practices (Field Research)

- \*Cerebral Palsy Associations of NYS
- \*Consumer Directed Personal Assistance Association of NYS
- \*Association for the Education for Young Children
- \*CP Rochester
- \*ARC Onondaga

# High Performance – By Design!

Achieve Results	<b>Lucky</b> <ul style="list-style-type: none"><li>•High results</li><li>•Low understanding of elements</li><li>•Continued success - unlikely</li></ul>	<b>Leading</b> <ul style="list-style-type: none"><li>•High results</li><li>•High understanding of elements</li><li>•Continued success - likely</li></ul>
	<b>Losing</b> <ul style="list-style-type: none"><li>•Low results</li><li>•Low understanding of elements</li><li>•Continued failure - likely</li></ul>	<b>Learning</b> <ul style="list-style-type: none"><li>•Low results</li><li>•High understanding of elements</li><li>•Achieve continued success-likely</li></ul>

Antecedents of Excellence

Doug Reeves, The Learning Leader, 2006

# Calendar: Key Dates

## Core Team Strategy Sessions:

- Strategy Session #1*: July 15 9:30-11:30am
  - Strategy Session #2*: August 18 8:30-10:30am
  - Strategy Session #3*: September 22 8:30-10:30am
  - Strategy Session #4*: October 20 8:30-10:30am
  - Strategy Session #5*: November 10 8:30-10:30am
- Report to Board: November 18 8:00-9:30am

## Task Forces:

- Task Force Facilitator Training: July 21 8:30-10:30am
- Task Force members named: July 31
- All Task Force Report Out: September 27 10:00-12:30

## Communication:

Enable Link, Enable Cable, Website

# Our Go Forward



# enable

individualized services  
for children & adults with disabilities

Together, as a community including **staff, our partners, participants, supporters...**  
we have an incredible opportunity!

We are positioning ourselves to make a difference in **the life of every participant  
that enters through our doors.**