

Strategic
Leadership **WINGS**
Conference

Charting Your Course:

How to prepare for your next strategic plan?

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Agenda

- Introductions
- What is a strategic plan?
- Why do they end up on a shelf?
- What do I need to start?
- Tools for getting started.
- Question and Answer

About Josh

- Executive Director of Caesars Foundation of Floyd County
- Academic background in organizational development from IU Southeast and Spalding University
- *Author of:*
 - *Strategic Planning in Small, Family-Owned Firms*
 - *Together at the Top*
- Community engagement:
 - Metro United Way, Vice Chair
 - Donors Forum of Kentuckiana, President
 - Indiana Philanthropy Alliance, Board Member

Meet a friend!

- Name
- Organization
- One thing we hope to learn from this session
- Favorite Halloween costume



What is a strategic plan?

Strategic planning is an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.



What strategic planning isn't.

- One goal.
- One idea.
- Being all things to all people.
- It's not about what we do.
- Is not meant to sit on a shelf.



Why do plans end up on a shelf?

- Too broad.
- Too narrow.
- Too complicated.
- Not realistic.
- Not dynamic.
- No one to manage the work.



Hitting refresh.

- We deserve a refresh.
- It's healthy to re-assess.
- Shifting priorities.

Refresh ≠ Failure

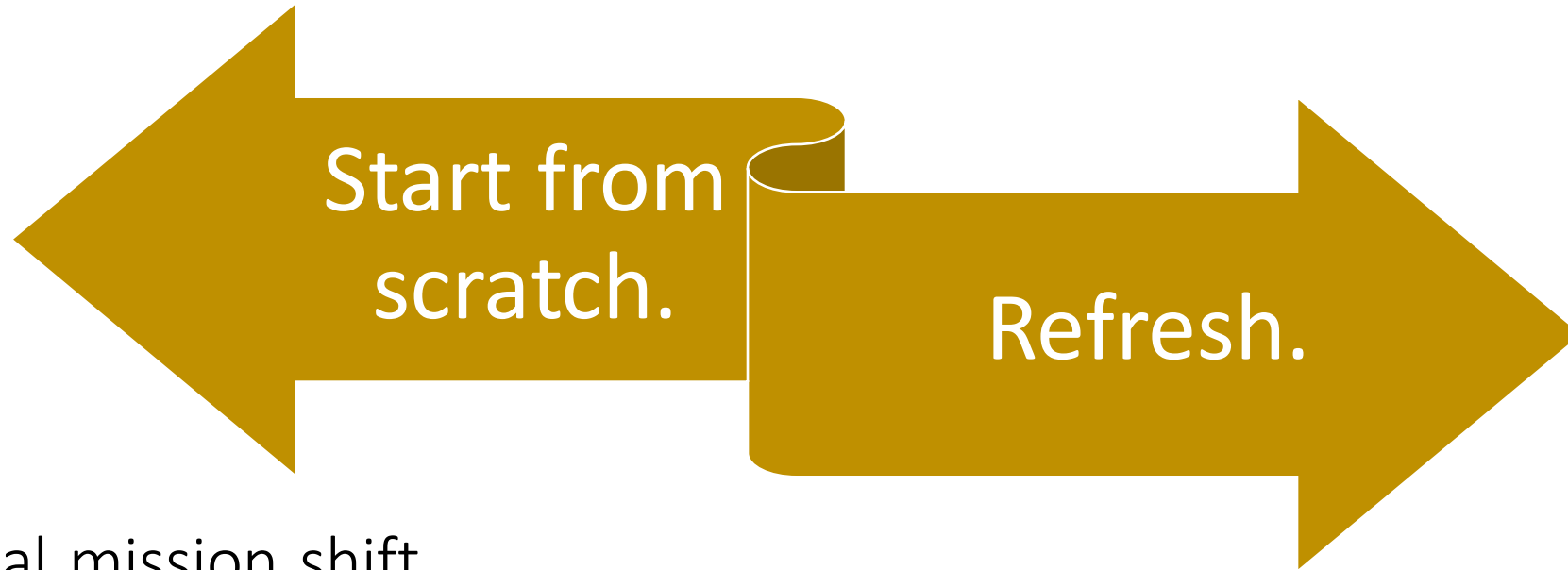


Pause.

- Give yourself a minute to pat yourself on the back.
 - Share two professional accomplishments in the last two years!



How do I start?



- Substantial mission shift
- New senior leadership
- Current plan is more than 4 years old

- Need to re-focus
- No new programs/services
- Current plan is being actively used

What should the process look like?

The Strategic Planning Process

1. Discovery – create a deep shared understanding of the current state.



2. Vision for the Future – Align stakeholders on a bold and achievable vision.



3. Strategy Development – Deliver the strategic blueprint.



4. Implementation – Operationalize the plan so that the team can put it into action.

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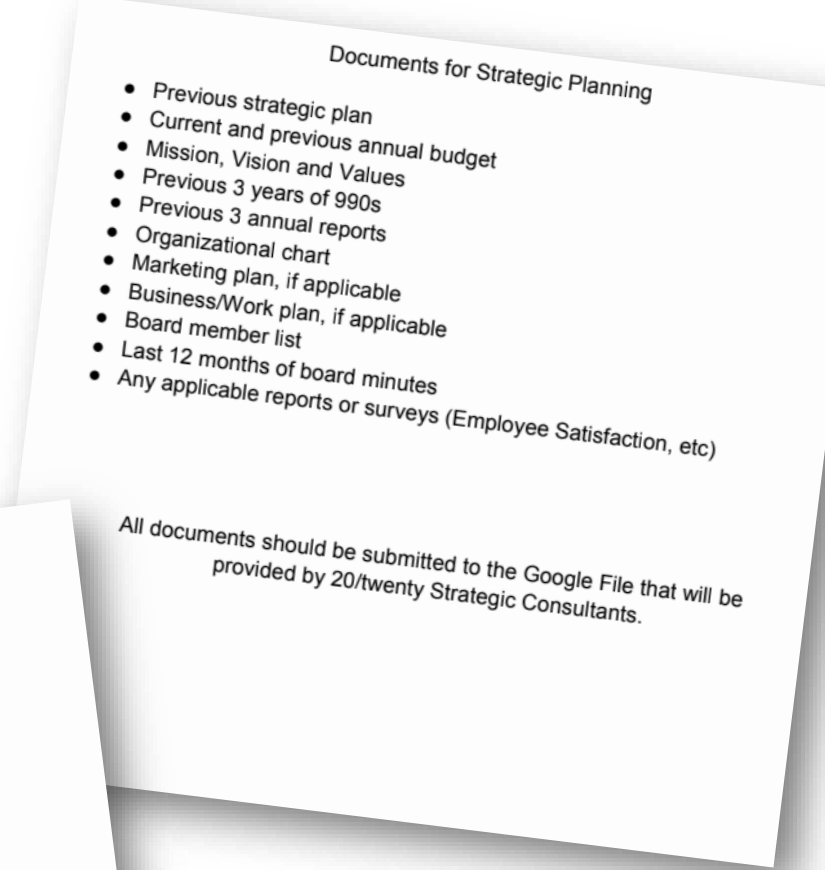
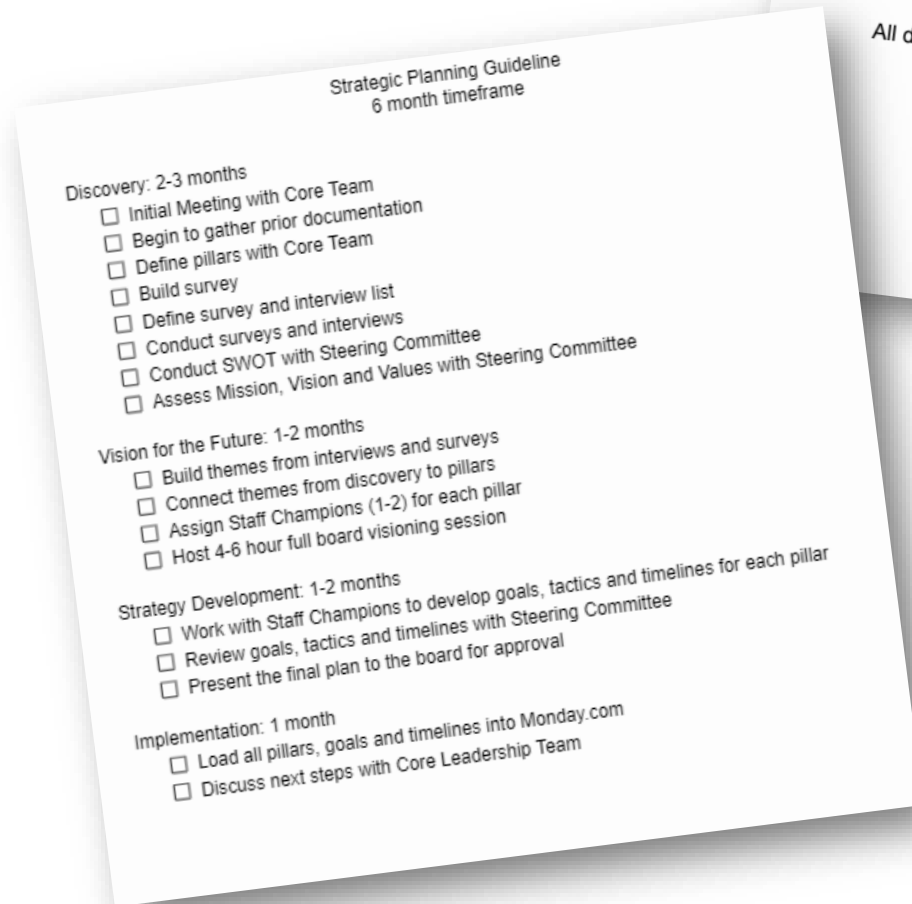
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How do I start?

- Get Board buy-in
- Decide on a timeline
- Begin compiling previous documentation



Five Core Elements to Consider

People

Profit

Processes

Product

Program

Rose. Thorn. Bud.

- **Rose**
 - a highlight, success, small win, or something positive that happened.
- **Bud**
 - new ideas that have blossomed or something you are looking forward to knowing more about or experiencing.
- **Thorn**
 - a challenge you experienced or something you can use more support with.

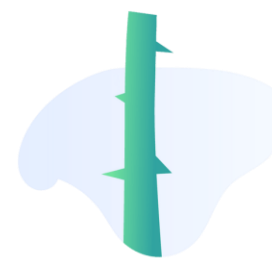
ROSE



BUD



THORN

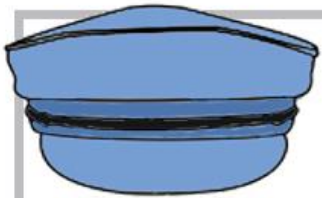
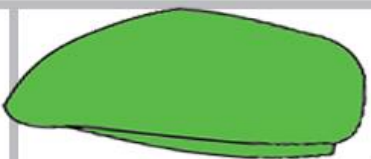
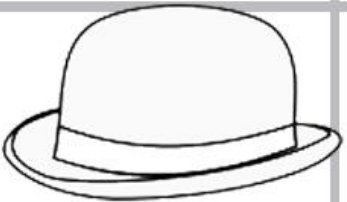
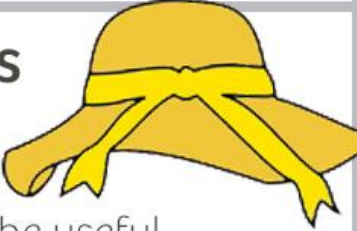

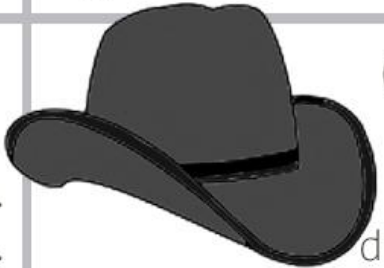


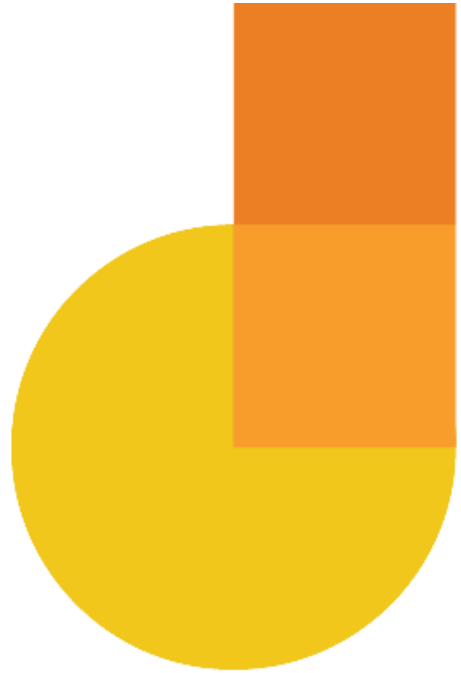
Rapid Ideation.

- Everyone writes down as many ideas as possible in a set amount of time before any ideas are discussed, critiqued, or fleshed out.
- This is done with a limited amount of time to assure a sense of urgency.



Thinking Hats.

 <p>Process</p> <p>Planning for action. What type of thinking is needed? Thinking about thinking.</p>	 <p>Creativity</p> <p>Ideas, possibilities, pie-in-the-sky alternatives. Imagining all kinds of solutions.</p>
<p>Facts</p> <p>What do we know? What do I need to find out? Objective information and data.</p> 	<p>Benefits</p> <p>Positive points. Why an idea may be useful. Logical reasons are provided.</p> 
 <p>Feelings</p> <p>Current feelings. Intuition, hunches, gut instinct. No reasoning needed.</p>	 <p>Cautions</p> <p>Weaknesses, risks, difficulties, dangers. Logical reasons are provided.</p>



Jambooard

Questions

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Answers

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Let's Connect!

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