Strategic Planning
through Collaborative Design

Nick Coquillard, ICC - Ann Arbor General Manager, NASCO Development Services Board Member, coquill@umich.edu

Maya Menlo, former ICC - Ann Arbor President, NASCO Board Member, maya.menlo@yale.edu

Special thanks to
Susan Lupo, Corporation for a Skilled Workforce

Welcome & Introductions

- Community norms
- Intros - name/pronouns, expectations for this session, big questions?
- Our expectations
- Parking lot

Outline

- ICC’s story
- Terms and Definitions
- Our Process
- Sample Strategic Plan
- Reflections and Recommendations

Outline

- **ICC's story**
- Terms and Definitions
- Our Process
- Sample Strategic Plan
- Reflections and Recommendations

ICC's visions for a planning process and outcome:

- Specificity and continuity
- Member involvement
- Develop skills through process
- Encourage innovation
- Create action plans for big ideas
- Create institutional memory
- Proactive

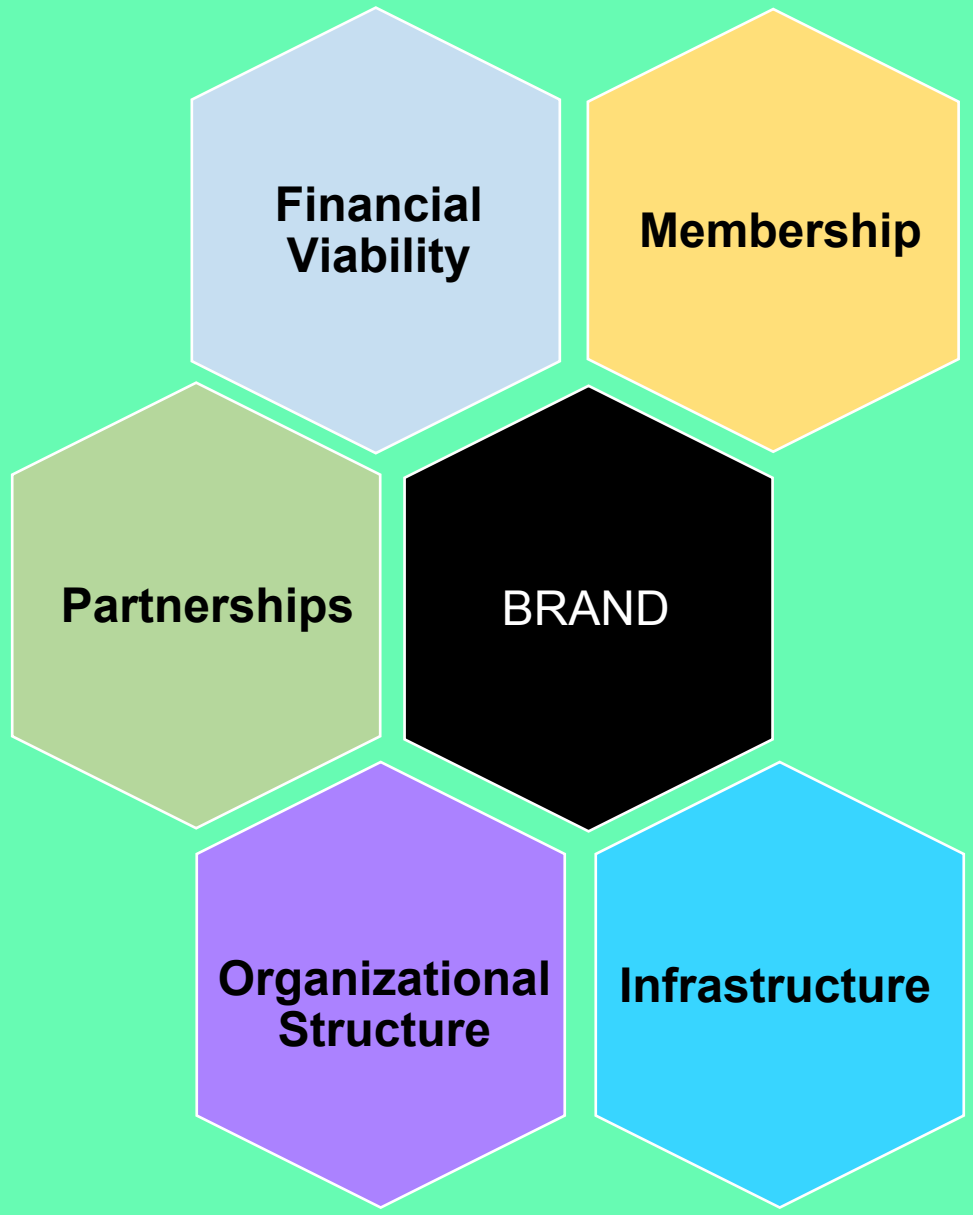
Outline

- ICC’s story
- **Terms and Definitions**
- Our Process
- Sample Strategic Plan
- Reflections and Recommendations

Terms and Definitions

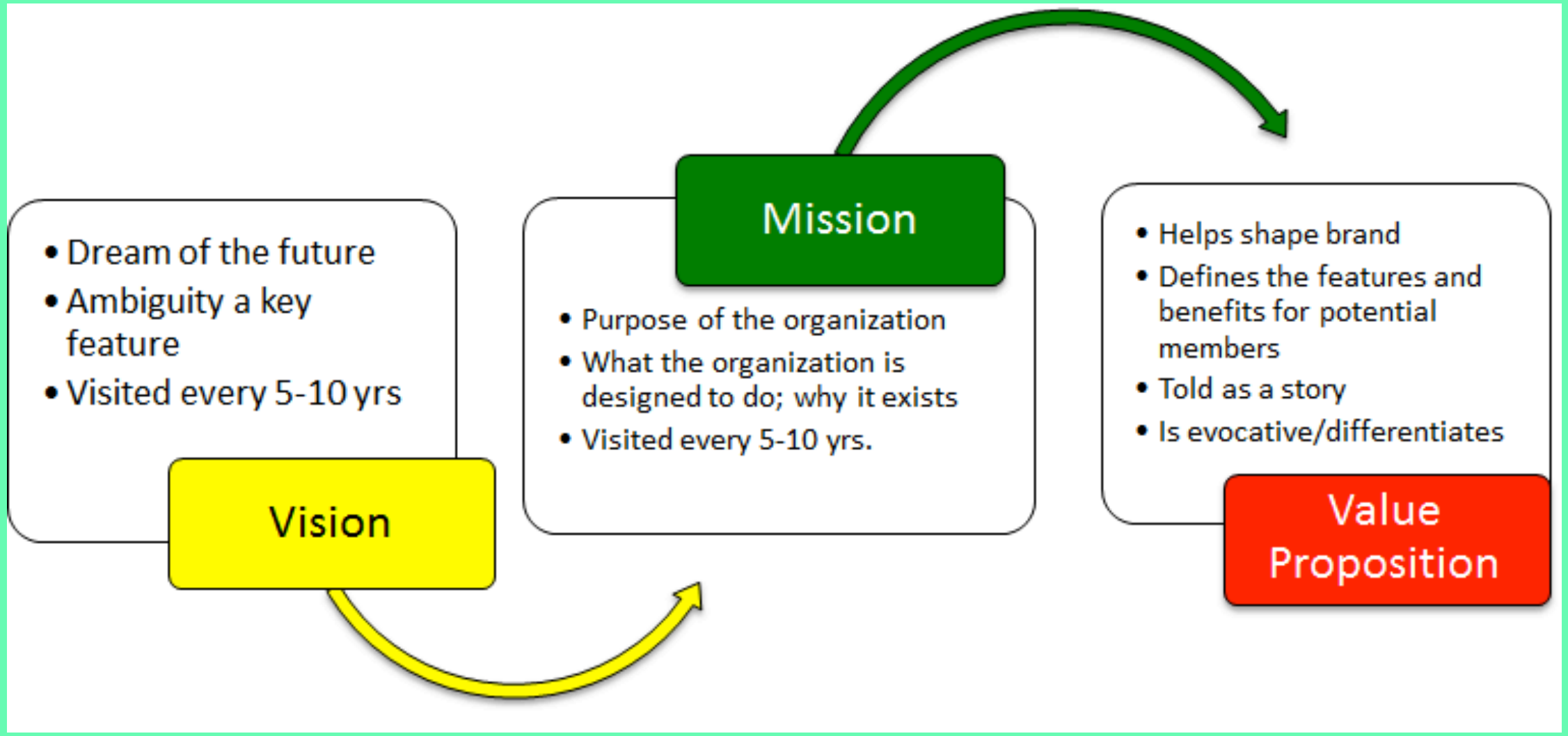
- Terminology can be complex - equip your members with the knowledge to engage fully in the process
  - Education, workshops, glossary of terms
- Strategic planning should help to fulfill your co-op's brand - its promise to members
- See handout

Fitting the pieces together: Our Brand

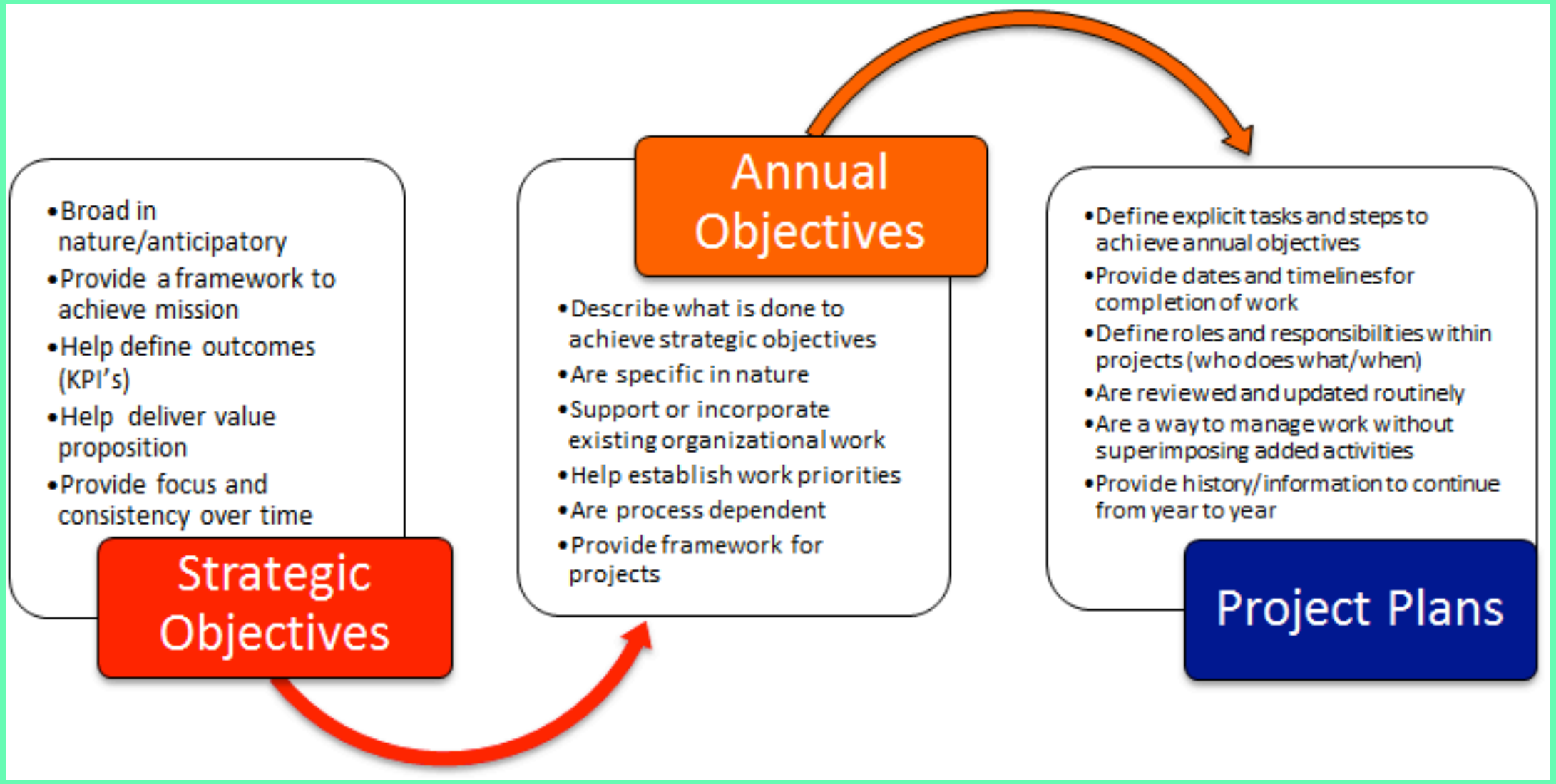


- ➔ Membership Issues/Support
- ➔ Recruitment & Retention
- ➔ Member Education / Development

Vision - Mission - Value Proposition



Accomplishing Objectives: Long Range - Annual - Project Plans



PROJECT TITLE								
Project Plan					**Project Manager(s):**			
						(No more than two people)		
Strategic Objective (2014-2018) COPY-PASTE FROM STRATEGIC PLAN		**Roles & Responsibilities (Insert names in boxes below)**						
		Primary Responsibility for the Task, Step or Activity	**Involved in the Task, Step or Activity**	**Provides Input to the Task, Step or Activity**	**Informed Task, Step or Activity Results**	**Targeted Completion Date**	**Deliverables**	**Software/ Hardware**
Annual Objective (2014-2015): COPY-PASTE FROM STRATEGIC PLAN								
Exploration/Discovery (information gathering)								
1	**[Task]**							
	3.1 [Activity]							
	3.2 [Activity]							
	3.3 [Activity]							
	3.4 [Activity]							

Outline

- ICC’s story
- Terms and Definitions
- **Our Process**
- Sample Strategic Plan
- Reflections and Recommendations

Fusion of Two Models

Human Centered Design

Hear

- Phrase the Challenge
- Community Driven Discovery
- Extremes & Mainstreams

Create

- Empathic Design
- Storytelling with a purpose
- Extract Key Insights
- Find Themes (Opportunity Areas)
- Create Frameworks

Deliver

- Quick Models
- Capabilities Guide Sheet
- Implementation Timeline
- Innovation 2X2
- Evaluate Outcomes

Structured Scenario Building

Define

- Define the Essential Question
- Large Scale Forces; Push the Future in Different Directions
- Social, Technological, Educational, Economic, Political

Develop

- Bundles Factors for Certainty and Uncertainty
- Building the Axis
- Developing the Story
- Identify Strategic Goals

Implement

- Develop the Plan
- Capacity Analysis
- Implementation Timeline
- Models and Tools
- Evaluate Outcomes

Key Questions

Structured Scenario Building Question:

What Will ICC Be (Have) In 10 Years?

Human Centered Design:

What's needed to create an ICC for the 21st Century?

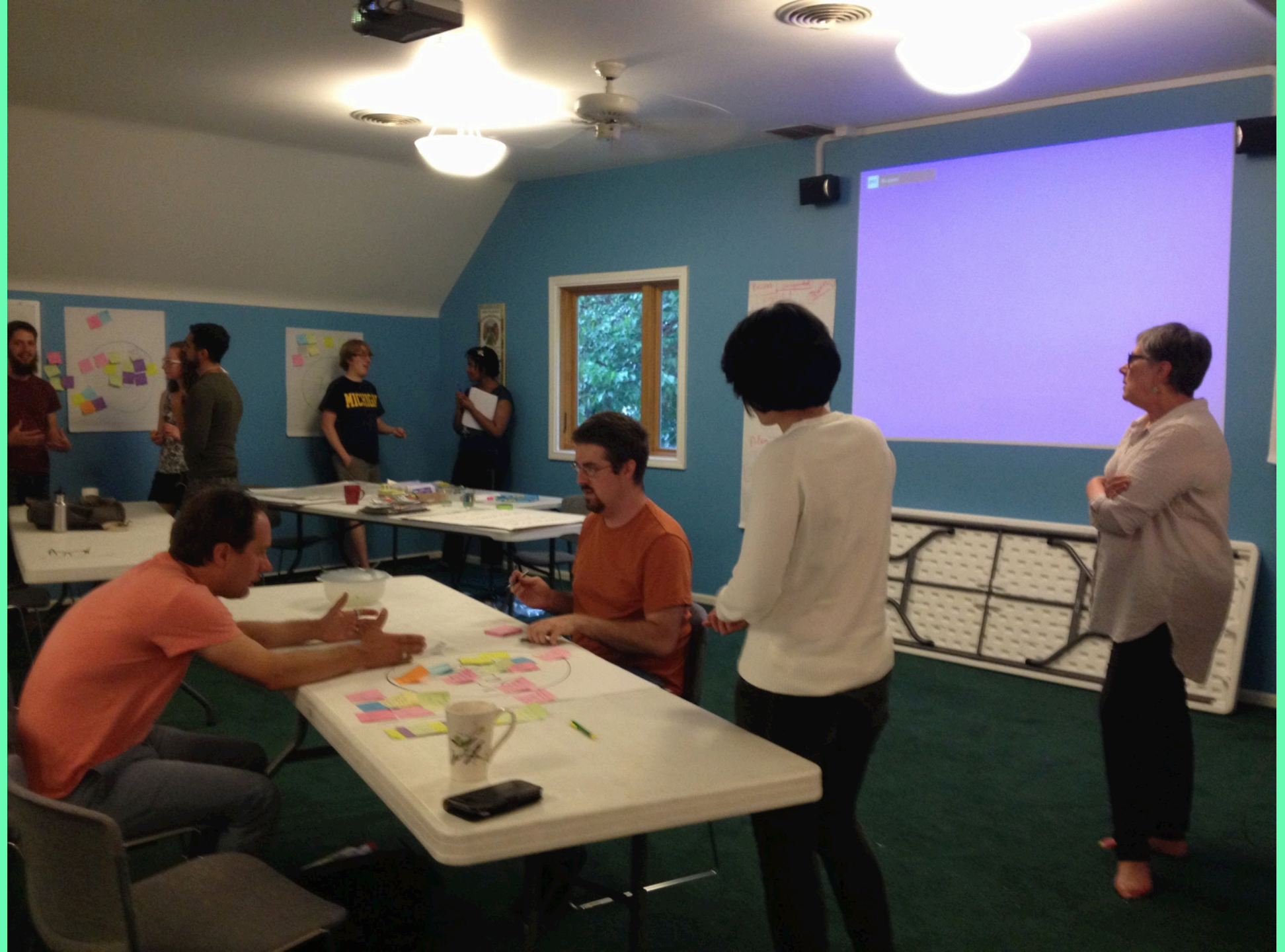
Beginning Framework

- Used workshops as a tool to brainstorm answers to framework questions
- Identify community’s needs and wants
- Create buy-in from membership

Workshops 1-3

Key Insights/Themes/Scenario Building

- Identified personal aspirations, aligned with hopes for ICC's future
- Defined criteria, qualities, characteristics for ICC's planning system
- Identified macro-factors (drivers of change) that had an impact on ICC (Memory Video)
- Created factor statements (trends/conditions that shape the future)
- Identified Value Propositions by decade



Workshops 1-3

Key Insights/Themes/Scenario Building

- Discussed evolution of ICC's brand and the brand's current impact
- Identified factors that will impact ICC's future (most certain/most impact) -- using STEEP Method (Social / Technological / Economic / Education / Political)
- Created Scenarios
- Developed a draft Value Proposition
- Identified key organizational areas
- Shared examples of strategic goals

ICC Planning Workshop – Day Three
Critical Factors Impacting ICC Future (Three or more dots)

Impact Statements	Green Dots	Red Dots
Technology encouraging little connectedness	5	1
Technology makes information more readily available	2	2
Technology needs/requires constant attention	1	2
Tech shifts members focus/interaction which impacts house culture		5
Conflicts become drawn out and passive aggressive (email)	2	3
Shift in skill sets	2	4
Socio-economic shifts in UM students	5	4
Existing knowledge & experience of incoming coopers has shifted away from life skills to social/technological skills	4	3
Demographics/size of college enrollment shapes the pool of possible co-opers	8	5
Time demands of college compete with ICC involvement	4	6
Expenses/economy/debt	3	4
Increasing inequality creates hostility between classes		4
Minority, LGBT rights becoming mainstream beliefs		3
Socio-economic inequality is being increasingly apparent in housing [markets]	8	5
There is a left-centric majority in our organization	2	3
Internal co-op political factions can cause discord in all areas of our organization		3
Changes in housing codes require the ICC to do more maintenance	7	8
Neighborhood opposition to large groups of students living together causes restricted zoning for group housing	6	3
Historic districts place restrictions on maintaining houses	2	1

What are the implications for developing an engaged ICC membership?
What are the fiscal implications?
What are the implications on ICC's brand?

Workshop 4:
Developing ICC Strategic Goals

- Group work - participants group themselves by choosing topics of interest
- Ask participants to draft strategic objectives using pre-created, user-friendly tools
  - We used a worksheet (see next slide)
- Participants present their work using posters
- Participants respond to other group's objectives by using sticky notes

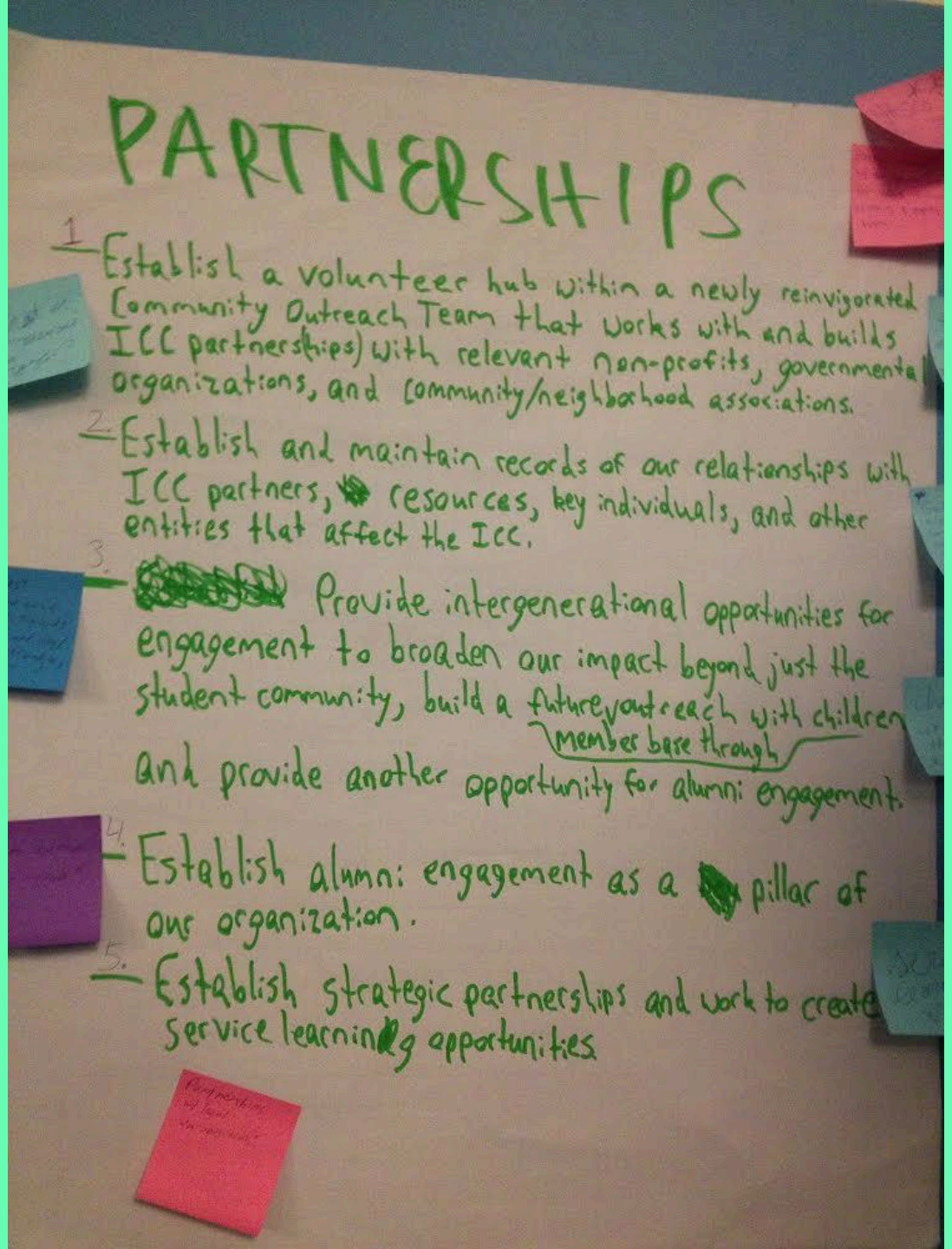
Workshop 4: Developing ICC Strategic Goals

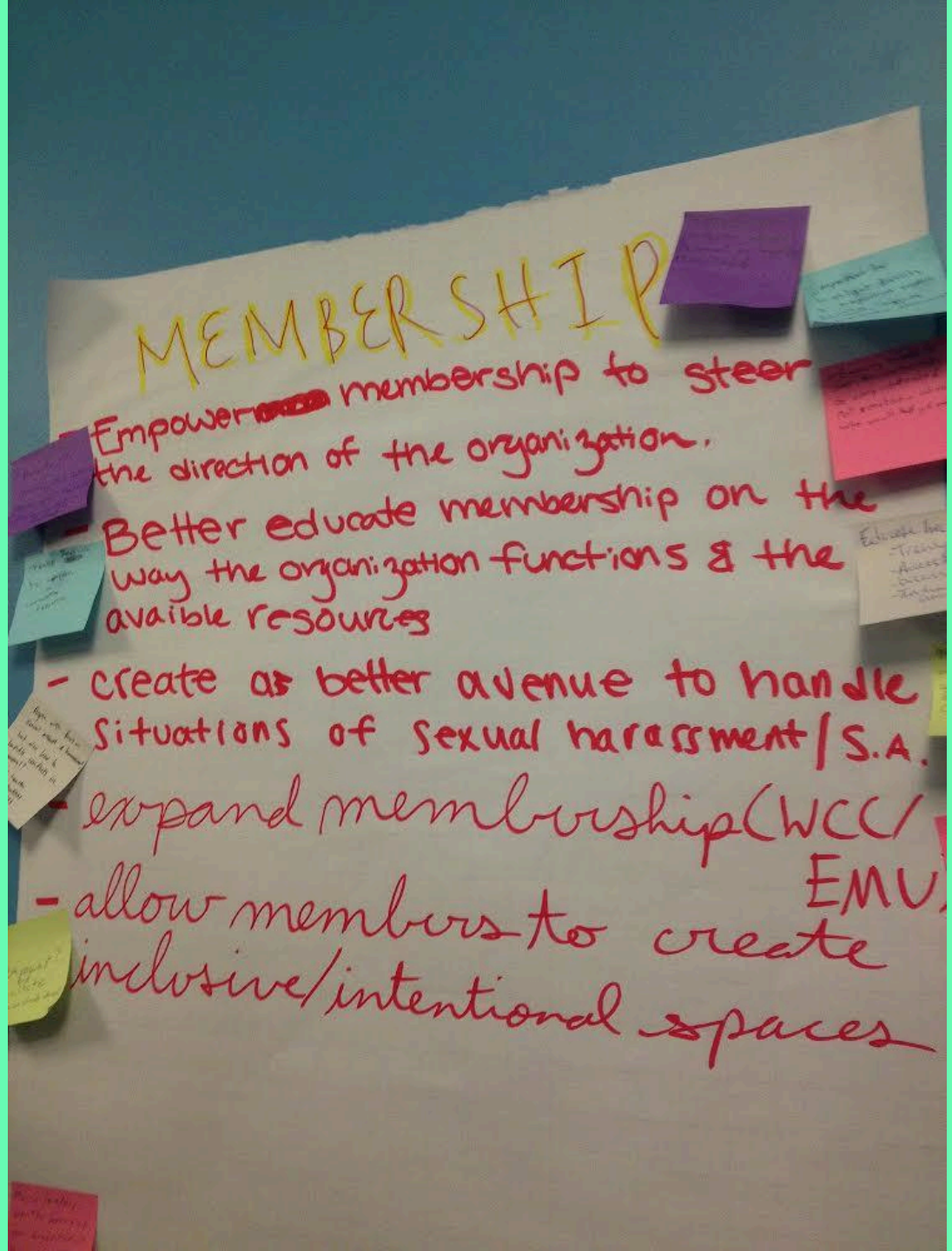
General Organizational Categories	Wish List/Issues	Impact Factors/Implications	Current Projects	Strategic Goals/Targets (use sample as a model)
Membership	**Membership Issues/Support** • Attention to & awareness of social justice issues • Conflict management, creation of safe space **Recruitment & Retention** • Member Satisfaction • Web Presence **Member Development** • Education • Mentorship & resources	• Technology encouraging little connectedness • Tech shifts members focus/interaction which impacts house culture • Conflicts become drawn out & passive aggressive • Shift in skill sets • Increasing inequality creates hostility between classes • Minority, LGBT rights becoming mainstream beliefs		
Financial Viability	• Ensuring Affordability • Attending to members financial needs • Full houses	• Technology needs constant attention • Expenses, economy, debt		
Partnerships	• Role of ICC in Community & Co-op Movement: Campus, City, World • Housing Co-op Movement • Mentorship & Resources • Education • Alumni	• Neighborhood opposition to large groups of students living together causes restricted zoning for group housing • Historic districts place restrictions on maintaining houses		
Infrastructure	• Maintenance & expansion • Technological	• Technology needs constant attention • Changes in housing code require ICC to do more maintenance		
Organizational Management	• High-functioning Staff Team • Effective Board of Directors • Effective Strategic Planning Process	• Technology needs constant attention • Time demands of college compete with ICC involvement • Internal co-op political factions can cause discord in all areas of our org.		

Strategic Objectives - Another Example

1	CQI Planning Matrix				
2	2009-2012 Objective 3				
3	Category: Performance Architecture				
4					
5	2009-2012 Objective	2009-2010 Objective	2009-2010 Objective	2009-2010 Objective	2009-2010 Objective
	3. Establish a quality and standards based Performance Architecture System that produces a High Performance Enterprise.	3a. Identify requirements, specifications and strategies to institute a comprehensive knowledge management system including technical systems and tools, organizational structures, staffing requirements, cost and ROI associated with system development.	3b. Establish a matrixed, CQI planning system that includes Product Key Performance Indicators, and Process Performance Measures, the ability to monitor and analyze performance and quality feedback structures.	3c. Produce a comprehensive market research and analysis system and an innovation incubator to inform product design, development and implementation.	3d. Establish planning system/project management roles and responsibilities, training opportunities, and skill and assessment system.

30's
NORMS


PARTNERSHIPS
1. Establish a volunteer hub within a newly reinvigorated Community Outreach Team that works with and builds ICC partnerships) with relevant non-profits, governmental organizations, and community/neighborhood associations.
2. Establish and maintain records of our relationships with ICC partners, resources, key individuals, and other entities that affect the ICC.
3. Provide intergenerational opportunities for engagement to broaden our impact beyond just the student community, build a future outreach with children member base through and provide another opportunity for alumni engagement.
4. Establish alumni engagement as a pillar of our organization.
5. Establish strategic partnerships and work to create service learning opportunities


MEMBERSHIP
- Empower membership to steer the direction of the organization.
- Better educate membership on the way the organization functions & the avaible resources
- create a better avenue to handle situations of sexual harassment/S.A.
- expand membership (WCC/EMU)
- allow members to create inclusive/intentional spaces

Proposed Future ICC Planning Cycle

How to continue to plan strategically!

ICC Planning & Research 2014

Outline

- ICC’s story
- Terms and Definitions
- Our Process
- **Sample Strategic Plan**
- Reflections and Recommendations

From Brainstorm to Action

Member Wish List Item:

Provide mechanisms and a path for alumni to fully engage and contribute

→ **Long-term Strategic Objectives:**

Create community engagement mechanism that provides members opportunities to network and participate in a variety of activities including service learning, direct volunteerism, and alumni/partnership mentoring

Establish alumni engagement as a pillar of the ICC community

→ **Annual Objectives:**

Begin to develop alumni mentorship system

Begin to develop House Reunion program

Member Wish List:
Partnerships Strategic Plan

1. Address concerns of existing and potential municipalities regarding property taxes, zoning, etc.
2. Help anticipate changes in city codes and positions those changes to support ICC
3. Strengthen brand by becoming more public face of the community
4. **Provide mechanisms and a path for alumni to fully engage and contribute**
5. Offer an avenue for members to acquire skills and competencies and have those validated by external groups
6. Provide potential resources and supports partnership requirements for grant funding
7. Provide additional marketing channels

Long-term Strategic Objectives:
Partnerships Strategic Plan

Establish a partnership system that will:

- P1: Define value propositions (i.e. features and benefits of engaging with the ICC) for all potential partners
- P2: Garner political support for ICC housing within key ICC municipalities (e.g. Ann Arbor/Ypsilanti) (aligns with Infrastructure)
- P3: Identify and nourish partnerships that will support the development of ICC as a model for cooperative/collaborative initiatives (other cooperatives, NASCO, nearby colleges, local businesses, etc.) and improve member experience
- **P4: Create community engagement mechanism that provides members opportunities to network and participate in a variety of activities including service learning, direct volunteerism, and alumni/partnership mentoring**
- **P5: Establish alumni engagement as a pillar of the ICC community**
- P6: Support alumni investment initiatives and capital campaign (overlaps with Financial)
- P7: Align partnerships with potential grant funding

Annual Objectives:
Partnerships Strategic Plan

Annual Objectives (2014-2015)
1. Brainstorm possibilities for a constant and institutionalized ICC Partnership and Alumni function(s) (team or committee etc.) and adopt any necessary Standing Rule revisions (P4) -- Community Outreach Team (COT), Alumni Team, Coordinating Committee CoCo), Board of Directors
2. Leverage current Community Outreach Team purpose statement, value propositions, and processes to define partnership development system (P3, P4) -- COT
3. Draft value proposition template for internal and external use (P1, P3) -- ReCo, COT
4. Align and integrate “volunteer hub” with web presence (P4) -- COT, Web Team
5. Continue to provide “one-off”, ad hoc volunteer opportunities and/or community education opportunities for ICC members (P4) -- COT
6. Strategically research and select at least two grants for which to apply in order to fund accessibility project in partnership with Infrastructure project team, create grant writing project plans (P7) -- DivCom
7. Begin to develop alumni mentorship system (P3, P5) -- Alumni Team, EdCom, DMS
8. Begin to develop House Reunion program (P5, P6) -- Alumni Team
9. Continue to work with on-campus and community partners to organize and offer workshops around issues of safe space, mental health, effective communication and sexual assault prevention (P3) -- DivCom, DMS
10. Begin to form and develop robust, lasting, personal connections with on-campus and community partners focused on issues of safe space, mental health, effective communication and sexual assault prevention (P3) -- DivCom, GM, DMS, Staff Team
11. Explore at least one opportunity for partnership or collaboration with another cooperative agency, in addition to sending members to NASCO Institute -- GM, ICC President

Outline

- ICC’s story
- Terms and Definitions
- Our Process
- Sample Strategic Plan
- **Reflections and Recommendations**

Starting Your Process

- Vision together about process and outcome
- Engage members in development of process
- Brainstorm together what will be realistic and beneficial for your organization
- You'll never be 100% positive, try it on!
- Maintain community norms and values
- Framing the task is key

Implementation

- Update your policies to ensure there is a structured process for reviewing current year annual objectives as well as reviewing and updating future year's objectives.
- Find your champions of the plan to help you build momentum and show progress.
- "Be3P" - The leader(s) must drive the plan and be patient, passionate and persistent.
- Have fun!

Tier 1	Partners
Finance Strategic Goals • Draft and propose a budget for fiscal year 2016-2017 which achieves the ICC budgetary targets for that fiscal year (F2) ***UPDATE:*** *Standard timeframe set starting in Oct. Create a project plan to start researching and collecting data prior to Oct.?*	DFS
Tier 2	**Partners**
Finance Strategic Goals • Streamline, update and centralize House Treasurer training to maximize effectiveness (F5)* UPDATE*: Karin (with help from others) reconstructed Treasurers Training and is tweaking further for the FW Training - about 50% progress.* • Create online resource center for members and Treasurers to simplify house finances and increase transparency (F5)* • Finalize online resource center for members and Treasurers to simplify house finances and increase transparency (F5) UPDATE*: 4 Treasurer resource links exist on the ICC Finance web page - do we want more/need more information? Need to review via project plan?*	DFS, Web Team
Infrastructure Strategic Goals • Begin to implement accessibility project plan (I1) UPDATE*: Work done this summer in DivCom - (need update to be placed here.)*	Maintenance Staff, MaMaCom DivCom
Organizational Management Strategic Goals	
Tier 3	**Strategic Goals**
Finance Strategic Goals • Explore methods of integrating financial management skills in member training from onboarding to participating as a Board member (F5) UPDATE*: ?* • Implement recommendations to promote awareness of ICC scholarships (F2) – UPDATE*: ReCo reporting working on this - other committees? Any plan for a project plan?*	DFS, ReCo, DivCom

One member leader used a tiering strategy with his committee to embrace the annual objectives, to chunk the effort through the year, and to build buy-in.

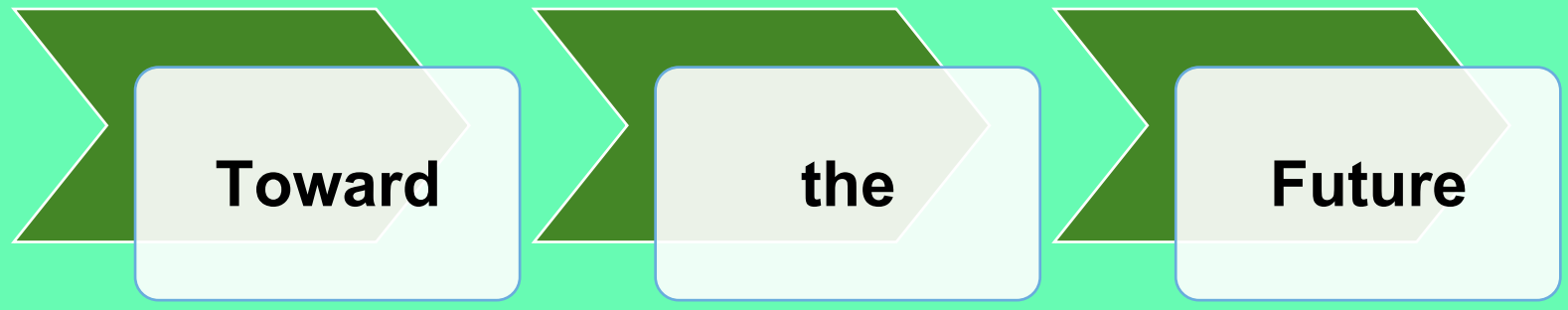
Reflections on Strategic Planning Process

- Pace of process - defining deadlines
- Be realistic about size of undertaking
- Staff involvement
- Cultivate intentional discussion
- Take feedback
- The 3 P’s of implementation: Patience, passion & persistence

Reflections on Strategic Planning Process

- Firm, but also flexible - plans change!
- 80% - 20% Rule
- Clarify roles and responsibilities - whose plan?
- Maintain support and energy
- You don’t really know how it’s going to go until you get going … and that’s okay!

Questions & Discussion

Nick Coquillard, ICC - Ann Arbor General Manager, NASCO Development Services Board Member, coquill@umich.edu

Maya Menlo, Former ICC - Ann Arbor President, NASCO Board Member, maya.menlo@yale.edu