STRATEGIC AND SCENARIO PLANNING
January 9, 2013

College of Southern Idaho
Blaine County Center
Division of Continuing Education


Preface: There is no single way to do strategic planning. It will vary with the context and the nature of the organization. And it will always be a work in progress.

1. Gathering Information: (phase one)

   A. Reading materials

   B. Arranging interviews and discussions

   C. Building trust

   D. Discerning the strengths and challenges of the organization

   E. Writing reports and what you have heard

   F. Getting feedback on the accuracy of your assessment

   G. Components of the organization

Notes:
STRATEGIC AND SCENARIO PLANNING for the MAR ELIAS EDUCATIONAL INSTITUTIONS
February 2-8, 2012
Ibillin
ORIENTATION DOCUMENTS

The Team: Dr. Robert Sawyer, Executive Director, Pilgrims of Ibillin, and Dr. Duncan Ferguson, educator, consultant, and member of the Board of Pilgrims of Ibillin


The Role of Consultants on This Initial Visit

1. To explore and learn about the issues facing the institution
2. To gain clarity about the institutions objectives in a planning process
3. To get acquainted and build trust
4. To understand mutual roles and needs
5. To begin the process of planning
6. To plot a timeline
7. To plan next steps

Our Approach:

1. To listen
2. To ask questions
3. To gather data: interviews, focus groups, surveys or questionnaires, read documents
4. To assist with but not to own the planning process
5. Often, we ask for basic questions in a variety of forms:
   - What is going on now?
   - Why is it going on?
   - What ought to be going on?
   - What can be done to reshape what is going on?

Some Core Values to Guide Us:

1. To relate to each person as a human being of great value, not simply as a resource
2. To engage in a process that enables the institution to achieve its full potential
3. To assist the institution in being effective in achieving its goals
4. To help create a setting in which people find their work fulfilling
5. To provide ways for those in the institution to have a part in creating the institution they love
6. To place the institution within the context of divine purpose

A Glimpse at Methodology

1. **Organizational development** is a process of increasing organizational effectiveness and facilitating personal and organization change through the use of strategies that are based on approaches developed in social and behavioral science. We will also draw upon methods indigenous to the Mar Elias Educational Institutions, its unique history, and its distinctive vision, mission, and goals.

2. **Scenario planning** is a means to represent a future reality in order to shed light on current action in view of possible and desirable futures. We will help those engaged in the planning to articulate approximately 3 different scenarios, and then engage in a careful planning process that begins with “If this...then that.” For example, if the Israeli government ceases its funding of the schools, then we will need to...in order to sustain our mission.

3. We will begin with **a few basic tasks**, in part to help the consultants, but mostly to make sure that those in the institution fully grasp and are motivated by the fundamental purposes of the institution. We will invite a select team of leaders within the institution to form committees which will carefully prepare and express the following:

I. **A Vision Statement**: A vision for our future: A vision is a statement about what your organization wants to become. It should resonate with all members of the organization and help them feel proud, excited, and part of something much bigger than themselves. A vision should stretch the organization’s capabilities and to image of itself. It gives shape and direction to the organization’s future. It should be brief and direct. For example:
   A. Year after year, Westin and its people will be regarded as the best and most sought after hotel and resort management group in North America. (Westin Hotels and Resorts)
   B. Every student is a successful independent learner, empowered for life in the global society of the 21st century.

II. **A Mission Statement**: Mission or purpose is a precise description of what an organization does. It should describe the business/activities of the organization. It is a definition of “why” the organization currently exists. Each member of the organization should be able to express the mission, and therefore it too should be brief and direct. For example:
A. FedEx is committed to our People-Service-Profit Philosophy. We will produce outstanding financial returns by providing totally reliable, competitively superior global, air-ground transportation of high-priority goods and documents that require rapid, time-certain delivery. (Federal Express)

B. In partnership with our community, we are deeply committed to provide our students with the best educational experience, preparing them to become capable, creative, caring, and responsible citizens.

III. The Goals that Guide Our Daily, Weekly, and Monthly Actions: The goals are a way of describing how we ‘live’ our vision and pursue our mission. Generally the goals are framed around the structure of an institution, although not limited to the structure. For example:

A. Build a realistic budget for fiscal year 2012-2013. (Finance office)
B. Enroll 575 new students in the fall of 2013. (Admissions office)
C. Hire 4 new faculty members in computer science, mathematics, 2nd grade, and the gifted students program (Academic office/Dean’s or Principal’s office)

IV. Core Values: Every organization or institution has core values which guide its work and common life. MEEI is especially rooted in values, and these values need to be clearly articulated. For example from an organization that supports MEEI:

A. Pilgrims of Ibillin engages in its work with the conviction that there is need for compassion, peace, and justice in Israel/Palestine. It is these values which guide its primary mission with Mar Elias Educational Institutions in the village of Ibillin and the other peace building projects.
B. Pilgrims of Ibillin shapes is work after the model of Jesus who showed compassion for his contemporaries in Palestine, working for people and justice for the people in a non-violent way.
C. Mar Elias Educational Institutions accepts students regardless of their ethnic heritage, religious background, ...and values each student as a child of God.

V. A Brief History of the Institution: We ask this question because we do our work in a context that is fundamentally shaped by our history? It gives us an internal frame of reference. For example:

A. The institution was founded by Father Elias Chacour in the 1970s in the village of Ibillin. Father Chacour was born in...educated at...
B. And on down the line with another paragraph, Father Elias Chacour was called to be the Archbishop of Galilee in the Melkite Church and now does not reside in the Ibillin.
C. The institution has grown from a small group of kindergarten students to now over 2500 students through the high school level.
VI. **The Context of Our Work:** We are not only shaped by our internal history, but profoundly influenced by our external circumstances. For example:

A. The government of Israel has become increasingly conservative in its orientation.
B. The so-called “Middle East Spring” altered the configuration of states within the Middle East, and continues to be a volatile factor in our security.

VII. **Strategies, Scenarios, Action Plans, and Objectives to Achieve Our Goals:** In light of our mission, vision, core values, our history, and the context in which we work, we will use the following strategies and scenarios to enable our institution to achieve its full potential. Generally, these strategies are in the form of plans that take into account current or probable future circumstances. They may be built around ‘departments’ of MEEI, such as external relations, human resources, finances, the primary, middle and secondary schools, the campus and its buildings, etc. For example:

A. We will provide the means to help our faculty members to advance their education. Add specific objectives:

B. We will find sufficient financial resources in order to increase the number of students from low income families. Add specific objectives:

C. We will add the following components to our program in computer education. Add specific objectives:

D. We will express our physical education facilities in order to insure that all of our students will have the opportunity to maintain good health. Add specific objectives:

VIII. **Assessing Our Progress:** An effort must be made to carefully track the progress of the Strategic/Scenario Plan. This will involve a clear description of success, a timeline, developing a way to measure progress, and a means of mid-course correction. See the enclosed handouts.
SOME GUIDING QUESTIONS FOR INTERVIEWS
The MEEI Consultation
February 2-9

Name: __________________________ Date & Time: __________________________

1. How would you describe the nature of the work that all of you are doing at MEEI? Is it going well? Are you pleased about the progress that you have made? Are the faculty, staff, and students pleased with their experience?

2. What has made your work so successful and satisfying? What is it about the organization of your work that makes it of such high quality? What are 2 or 3 factors that have contributed to the success of this institution?

3. What do you think might be changed in order to do you work in an even better way? What are the problems that you face? What do you think the institution should look like in five years?

4. What do you think would be the best way to make changes in order to improve the quality of the institution and of the education it offers? How is change made at MEEI? Is it a good process?

5. How might we help you in the preparation of a strategic plan that might guide the institution over the next 3-5 years? What are the risks of such a process? And how might we do it in a way that will help the institution move forward and thrive?
"Getting to Collaboration"

**Shared Purpose**
The members of a collaborative team - 1) share common reasons for working together that foster camaraderie; 2) clearly understand who's on the team and why; and 3) know what their common purpose is, why it's important, and who it matters to.

**Knowing Others**
Collaborative team members: 1) understand their teammates' strengths and challenges, 2) consider what's important to others and how they think, 3) know how best to communicate and what problem-solving style is preferred, and 4) are aware of what motivates the others.

**Communications**
In any new collaborative environment, it is essential to begin by establishing a common understanding of the expectations and goals of the group. Effective communication is key to overcoming initial difficulties and reaching consensus on the best approach. The team must be open, transparent, and consistent in their actions, so that every member feels respected and heard.

**Collaboration**
When the conditions are right, all team members are engaged and contribute, and the team is able to leverage their diverse talents and ideas to achieve their objectives.
**Leadership Team Dynamics:**

**On the Way *Down* Versus on the Way *Up***

Jim Collins. *How the Mighty Fall* (2009)

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<tr>
<th>Teams on the Way Down</th>
<th>Teams on the Way Up</th>
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<td>People shield those in power from grim facts, fearful of penalty and criticism for shining light on the harsh realities.</td>
<td>People bring forth unpleasant facts—&quot;Come here, look, man, this is ugly&quot;—to be discussed; leaders never criticize those who bring forth harsh realities.</td>
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<td>People assert strong opinions without providing data, evidence, or a solid argument.</td>
<td>People bring data, evidence, logic, and solid arguments to the discussion.</td>
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<td>The team leader has a very low questions-to-statements ratio, avoiding critical input and/or allowing sloppy reasoning and unsupported opinions.</td>
<td>The team leader employs a Socratic style, using a high questions-to-statements ratio, challenging people, and pushing for penetrating insight.</td>
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<td>Team members acquiesce to a decision yet do not unify to make the decision successful, or worse, undermine the decision after the fact.</td>
<td>Team members unify behind a decision once made and work to make the decision succeed, even if they vigorously disagreed with the decision.</td>
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<td>Team members seek as much credit as possible for themselves yet do not enjoy the confidence and admiration of their peers.</td>
<td>Each team member credits other people for success yet enjoys the confidence and admiration of his or her peers.</td>
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<td>Team members argue to look smart or to improve their own interests rather than argue to find the best answers to support the overall cause.</td>
<td>Team members argue and debate, not to improve their personal position, but to find the best answers to support the overall cause.</td>
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<td>The team conducts &quot;autopsies with blame,&quot; seeking culprits rather than wisdom.</td>
<td>The team conducts &quot;autopsies without blame,&quot; mining wisdom from painful experiences.</td>
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<td>Team members often fail to deliver exceptional results, and blame other people or outside factors for setbacks, mistakes, and failures.</td>
<td>Each team member delivers exceptional results, yet in the event of a setback, each accepts full responsibility and learns from mistakes.</td>
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UNDERSTANDING CULTURE: The Need to be Informed

A Definition: The culture of a group can...be defined as a pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, which has worked well enough to be considered valid and, therefore, to be taught to new members of the correct way to perceive, think, and feel in relation to those problems.

Dimensions of Culture:

1. Observed behavioral regularities when people interact
2. Group norms
3. Espoused values
4. Formal philosophy
5. Rule of the game
6. Climate
7. Embedded skills
8. Habits of thinking, mental models, and/or linguistic paradigms
9. Shared meanings
10. “Root metaphors” or integrating symbols
11. Formal rituals and celebrations