



## ***Strategic Planning for Boards***

**Preparing for the Workforce  
Investment Act**

## ***Expectations for Today***

- **Begin strategic planning**
- **A guided work session**
- **You will do most of the work**
- **Work in teams**
- **End with an “Action Plan”**
- **You will accomplish “real work”**

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### **Welcome**

**Introductions (if time permits)**

**Our focus today is on strategic planning. But we’re not just going to learn about it or talk about it -- we’re going to do it.**

**I’ll be helping to guide this session, but you’ll do most of the work in teams. This will be a product-oriented session. By the end, you will have the beginnings of a strategic plan that reflects your vision for the workforce investment system and that addresses the real needs and issues in your community.**

**Some of you may have already completed your WIA 5-Year Strategic Plan and some may already be providing services under the new legislation. Think of this session as a chance to move beyond WIA Title I, to do the type of strategic planning that is at the heart of WIA, focusing on systems and outcomes.**

**What are your expectations for today? Anyone have any that you don’t see here?**

## ***Participants' Responsibilities***

- **Contribute**
- **Work collaboratively**
- **Don't shy away from disagreement**
- **Be creative, honest, specific**
- **Make decisions through consensus**

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Our work today will reflect one of the WIA's key principles: a successful workforce development system needs collaboration among a wide range of community organizations.

I want to stress that you are on this Board and here today because you bring the necessary expertise and experience to this process. Together as a group, you reflect the many needs and interests within your community. This is your opportunity to get your ideas on the table and work to achieve a common understanding and vision.

To really do this, you can't be shy. Don't be afraid to disagree, as long as you're also willing to listen and be open to other perspectives. We are going to make decisions using consensus, so we'll all need to be honest and flexible.

Let's review briefly what consensus is and is not.

## ***Consensus is Not...***

- **Majority rule**
- **Being a steamroller**
- **Being a marshmallow**
- **Taking a middle-of-the-road position**

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We are expecting today's work to reflect the consensus of the Board. I just want to make sure that we all have the same understanding as to what consensus means.

I have listed some of the common misconceptions about consensus.

## ***Consensus Is...***

- **A decision everyone can “live with” and support**
  
- **How do we reach it?**
  - Give honest input
  - Listen actively
  - Avoid the “shadow play” syndrome

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So what is consensus? A decision that all of you can live with and support when you leave the room. No one perceives an ethical conflict or a fatal flaw. The consensus position may not be everyone's first choice, but it's one that everyone will support and no one will undermine.

The advantages? A higher level of commitment because everyone took part in the decision making. Also, you'll be better able to respond to changes in context because everyone knows the reasoning behind the initial decision.

So how do we do it? Give honest input and listen actively to others. And most importantly, avoid the “shadow play” syndrome. You all know how this works. There is animated discussion in the hallway because people have strong opinions on issues vital to the organization. Then people enter the formal meeting and few of the vital issues are discussed. Or everyone sits in the meeting and nods their heads, then leaves the room and says, “Do you believe this ....?” The meeting becomes just a “shadow play.” Consensus cannot succeed in this “shadow play” environment. Your job is to ensure that the hallway discussions become part of this planning process. Think of the costs of being in this session -- all of your salaries and work at your organizations you're not doing. This is a major investment. Why make that kind of investment and not talk about the real issues?

## ***Facilitator's Responsibilities***

- **Provide tips on strategic planning**
- **Act as timekeeper**
- **Maximize participation**
- **Assist in “flipcharting”**
- **Develop the hard-copy version of the work product**

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While I will offer a picture of the strategic planning process and some tips on how to do it, my primary job today is to make sure that you produce a consensus-based work product. I will help keep track of the time, and be on the lookout for Steamrollers and Marshmallows. If necessary, I will help develop “flipchart” language for your product. I will also develop a hard copy report that will be based on the decisions you make today.

I also want to stress that I am not here as a local area expert or as the person who will write your Strategic Plan. My job is to manage a product development process for you and support you in the development of your strategic plan.

## ***Today's Road Map***

- **Welcome and expectations**
- **Board planning responsibilities**
- **Elements of strategic planning**
- **Start planning**
- **Identify critical next steps**
- **Wrap-up**

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We are looking to achieve two objectives today. The first is to give you an overview of the Board's planning responsibilities in the WIA. Secondly, we want to give you an opportunity to begin dealing with the "live" issues in your service area. I want to stress that if you are engaged in a productive dialogue, you will not be cut off to meet an arbitrary schedule. My job is to promote dialogue not cut it off. If needed, I will adjust the schedule to meet your needs.

## ***Composition of Workforce Investment Boards***

- **Local Elected Officials (LEO)**
- **Majority business representatives**
- **Education and labor representatives**
- **Community organization representatives**
- **The economic development community**
- **One-stop partners**

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**Let's begin by briefly hitting on some of the key aspects of your Board - your composition and your responsibilities.**

**As you can see from this list, the new Boards under WIA will bring a broad range of perspectives to workforce development issues. The broad composition of the Board is intended to promote a comprehensive workforce investment system for your service area. The Board is business led. These business representatives know and understand the needs of the business community and are in the best position to meet them.**

**Because of the size of the Board, one of your challenges will be to develop a structure and processes that promote active and open communication between the members of the Board, and that allow all members/stakeholders to have ongoing and meaningful input. Who will come to these meetings if they're not meaningful? Certainly not all of you --- the people who can make a difference in this community.**

## ***Responsibilities of Workforce Investment Boards***

- **Oversee local workforce investment system**
- **Develop strategic plan for local system**
- **Designate one-stop operators**
- **Certify eligible training providers**
- **Establish performance goals**
- **Evaluate and improve performance**

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As you can see, the legislation puts a heavy emphasis on the strategic nature of the Board. That is why we are having this strategic planning session today. These responsibilities also suggest some obvious planning issues such as developing appropriate performance measures and establishing a certification system for training providers.

## ***The New Framework***

- **An opportunity to “think big”**
- **The place where community leaders come together to dream and plan**
- **The vehicle to achieve community goals**
- **Focus on system outcomes and performance, not program operations**

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WIA’s strategic planning requirements present an opportunity for you all to “think big” about the workforce issues facing your community, and how you can build a system that addresses them. This Board should not be at the table where community decisions are made, but should be the table around which community leaders come together to dream, plan, and achieve important community outcomes. You have an opportunity to create a vision around which individual organizations can rally and align themselves. You have most of the key partners here in this room -- if you’re missing some, you might want to invite them in!

Are there key partners or stakeholders who you need to reach out to in this planning process?

Another key part of your job is to focus on performance and results.” You will have to find a way to avoid getting caught up in the minutia and operational details. It will be an ongoing job to constantly monitor the ability of the workforce investment system to address local needs. Your role is much like that of a corporate Board -- assessing progress towards organizational goals, noting change in the operational context, shifting organizational priorities as needed, and mobilizing resources.

## ***Skills Needed for the New Framework***

- **The ability to...**
  - **Develop community linkages, especially with economic development**
  - **Anticipate trends**
  - **Communicate your vision**
  - **Assess performance**
  - **Attain public recognition for your accomplishments**
  - **Promote long-term change**

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Clearly no one partner can do this on their own. This will require a close collaboration between all stakeholders. A critical one that's often overlooked is economic development.

You'll also need the data and insight to anticipate trends. You'll need to be able to communicate your vision, get buy-in, motivate partners and mobilize resources. You'll need to develop the goals and measures needed to assess system performance and continuously improve. You'll need lots of ways to brag about your successes, because we all know success breeds success. Finally, you'll need the patience of a saint to promote long-term change.

Keep these in mind as we proceed. Planning is mostly about where you want to go as a community, but your planning also might have to address your existing Board capabilities so that you can achieve important community outcomes. How visible is your Board and Workforce Investment System now? Do you have the connections and recognition you need to achieve your goals? Is everyone who needs to be around this table here? With all this mind, let's start planning.

## ***What is Strategic Planning?***

- **Considering and understanding many possible futures**
- **Thinking about options**
- **Making informed choices**
- **Engaging your partners and stakeholders to move toward a common vision**

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So what is strategic planning? It's a process that let's you consider all the possible directions you could go in, then make an informed choice about where you want to go.

It's a process that can't be done in a vacuum -- not without information, and not without input and buy-in from all key stakeholders. Without that, you won't have a system, but a number of components, some of which are moving in opposite directions.

## ***What does Baldrige Say?***

- **Planning allows you to “align” your strategic objectives with:**
  - **Your Vision**
  - **Customer Needs and Expectations**
  - **Programs and Resources**
  - **Measurement systems**

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Let's talk for a moment about how the Malcolm Baldrige Award characterizes strategic planning. I mention it because most of you, especially the private sector folks in the room, probably know about the Baldrige Award. It is given out annually to organizations, mostly private companies, that have strong continuous improvement systems built into their everyday operations. It focuses on seven dimensions to organizational excellence, one of which is strategic planning. [The others are Leadership, Customer and Market Focus, Information and Analysis, Human Resource Focus, Process Management, and Business Results.]

Baldrige stresses that a good strategic plan should create “alignment” between your strategic objectives and your vision of the future, your customers' needs and expectations, your programs and resources, and the outcomes you track. That means your strategies will bring you closer to your vision, be customer-focused, build on and mobilize existing resources, and be tracked with performance indicators so you can make improvements along the way.

## ***Common Objections***

- **We develop good ideas, but nothing happens**
- **We have too much real work to do**
- **Who will write a strategic plan?**
- **Who will read a strategic plan?**
- **Thinking creatively is hard work**
- **We don't have enough information**

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So if strategic planning is so important, why do some of us feel dread when we hear the words? Because we've all been through strategic planning processes where you put everything on paper, then what happens? Nothing. Also, we're busy people. With all the fires we have to put out every day, who has time to develop a strategic plan, especially if no one is going to read it? On top of it all, thinking about the future, thinking creatively is just plain old hard work. Plus we really don't have all the information we need to make wise choices. We don't want to move in the wrong direction, do we?

Well, all of these common objections have some merit when the strategic plan does not address real issues (remember the "shadow play" syndrome?), when the plan does not have full support and buy-in, and when there's no follow-through. That's why we're going to leave today with a clear sense of what happens next, so this is not a waste of your time. That's why I'm here to support you and do some of the "scribing" of your ideas and decisions. That's why all the people who have the knowledge to plan effectively for your community and who need to buy-in are here on this Board.

## ***Why is Strategic Planning Important?***

- **Keeps you ahead of the curve**
- **Avoids “crisis management”**
- **Spots untapped resources**
- **Focuses resources where they are most needed**
- **Identifies your role in achieving important community outcomes**
- **Enables you to celebrate your success**

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One way of summarizing the virtues of strategic planning is to remember that a good plan is a valuable decision making tool. A good Plan will give you a vision that anticipates trends, changes, future needs, so you'll be somewhat ahead of the curve. When something unexpected happens, you'll have a framework for making sense out of it and knowing whether and how to address it. Plans can (and should) always be modified to make sense in today's environment.

For the new WIA Boards, the process of planning will be particularly valuable. As you identify system objectives and the necessary resources, you will identify “untapped” resources both on the Board and in the community. Also, your comprehensive “vision” will make each component part of your system more efficient since the “pieces” of your system will be designed to fit together. You will be able to avoid duplication of effort, and discover the ways in which systems, staff, organizations can support each other.

Finally, you will be able to know clearly the role you've played in keeping this community vital and alive, and you'll be able to look back and celebrate your success.

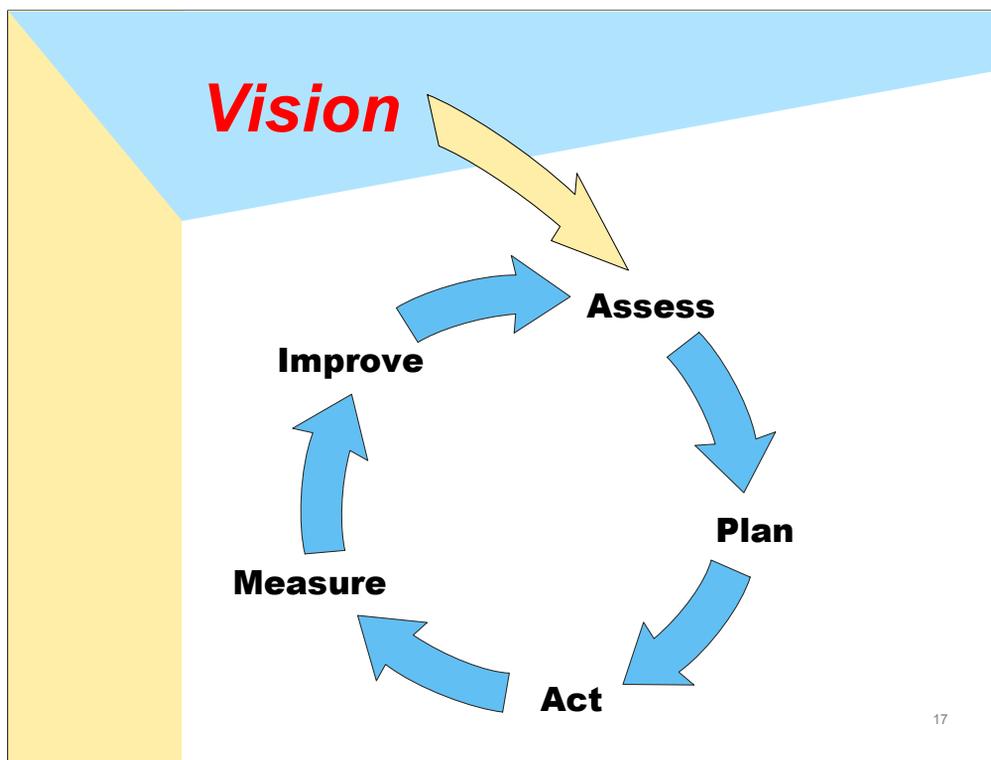
## ***What are the Key Steps in Planning?***

- **Create a mission and vision**
- **Assess conditions**
- **Identify strategic objectives and measures of performance**
- **Develop action plans**
- **Implement**
- **Track performance**
- **Reassess/refine/make improvements**

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The steps listed here are the core steps in the planning process. Now, at the implementation of WIA, is the critical time to clearly articulate a mission and vision for your system. It's a time to assess conditions. What are your job seeker and employer customer needs? What are your products and services? Who is your competition? What key gaps can you fill? As you develop strategies to meet these customer needs, you will want to talk to job seekers and employers about the "real" indicators of program success.

Too often, people forget about the last 4 steps, which is why strategic plans often sit on a shelf and are a waste of time. Without follow-up, without action, they're meaningless. Good strategic plans should drive your everyday work and meetings.



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This diagram emphasizes that strategic planning is not a discrete, one-time activity. You don't just write your plan, sign off on it, put in it a pretty binder, and check it off your "to do" list. A strategic plan forms a framework within which you act, measure, and constantly reassess and refine. All put together, we have a continuous cycle of planning, implementing, assessing and improving.

I put the "vision" outside of this circle because, typically, you wouldn't modify it much. Your objectives might change as your circumstances change, but your vision typically remains long-term and constant. But is that to say that the vision should never change? Of course not. Could things happen that would make your vision obsolete? Of course.

The entire plan is flexible and should be meaningful. Anytime the situation changes so that it's not as meaningful, change it! Why not? You wrote it; you own it.

Now let's address these steps in greater detail, and start creating your plan.

**Vision** Assess Plan Act Measure

## ***Vision: An Opportunity to Dream***

- **Mission**
  - **Who are we and what are we about?**
- **Vision**
  - **What do we want to become and achieve?**



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The vision is your opportunity to dream, to think big about where you are going as a Board and as a workforce investment system. Your mission statement is about who you are and what you do. It's filled with verbs. "Our mission is to...do what?"

The vision is all about drawing a compelling picture of your future and what you've achieved. It's filled with adjectives and nouns. "In five years, we will have accomplished....what great things?"

The mission and vision will give your Board a concrete sense of where you want to go and what you want to achieve. It should also motivate your partners to move in the same direction. To get the sort of buy-in that makes a difference in how people act, it should reflect the needs and aspirations of your community and be the result of an inclusive plan development process that invites participation from all sectors.

## ***Example from Portland, Maine***

- **Our mission is to promote economic development by providing effective human resource development opportunities for individuals and employers.**

Here's an example from a one-stop in Maine, FYI. What do you think? Any comments?

## Activity 1: Vision

- **Identify your mission**
  - *“Our mission is to....”*
  
- **Create your vision**
  - *“In 5 years, our Board will have accomplished....”*



So let's take some time to do this. Let's break into [X] small groups and use Activity Sheet #1 to begin to identify your mission and vision. Take 15 minutes, then we'll see if there is some commonality among the groups.

If your Board already has a vision and mission statement, this would be the time to reevaluate them and make sure they have the systems-focus that WIA invites.

As you do this, don't be bound by restrictions of the current and previous systems. The implementation of the WIA provides the opportunity to design and implement a workforce investment system tailored to this community's needs. You should be looking to develop a "shoot for the moon" plan. It should be one with realistic goals, but it will set in motion a process that will motivate the Board and others in the community to achieve important community goals.

## ***Assessment***

- **What are our customers' needs?**
- **What products/services do we offer?**
- **Who are our stakeholders/partners and what are their interests?**
- **What's happening in the business, political or educational environment?**
- **Where are the opportunities or gaps?**

Once you've articulated where you want to go, the next step is all about assessing your situation so that you can get there.

The assessment can be broken into internal and external components. The internal questions focus on your system: Who are your customers and what are their needs? What products and services do we offer?

The external questions focus on outside factors that can influence what you can do and achieve: Who are our partners and stakeholders? What are their interests/goals? What's happening politically in our state/community? What's going on in our business and educational communities?

Ultimately, the assessment is all about identifying opportunities or gaps -- between where you want to be and are today, or between what customers need and what they're getting -- that you can act on.

## **Activity 2: Identifying Customer Needs**

- **As a large group, answer the following:**
  - **Who are our customers?**
  - **What are their needs?**
  - **What are the critical unmet needs or gaps?**



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So that we can keep moving forward, we're going to focus on our customers' needs today and we're going to base our work on what we know already. You may decide to do a more in-depth assessment at a later date focusing on all of the internal and external areas. You may also decide that you need more concrete data and to do more data gathering for future planning sessions.

For instance, if you're not basing this discussion of customer needs on data you've collected, you'll probably want to do a check and ask your customers and make sure you have a good grasp of their needs. Or there are lots of tools out there you can use to do this more fully after we leave today. You can conduct surveys or focus groups, do trend analysis by identifying the major social, political (both federal and state), technological and economic issues that will affect you.

All that said, we're going to plow ahead and consider these questions as a large group. We'll see if we can reach consensus on the answers, then hopefully these answers will help you identify key issues you're facing.

### **Activity 3: Identifying Key Issues**

- **Given the unmet needs or gaps identified earlier and other issues you know of....**
  - Write down the 5 most important issues your Board is facing
  - Be as clear and concise as possible
  - Please don't talk to anyone
  - You have 5 minutes



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Now let's take 5 minutes to think quietly on our own about the key issues the Board is facing. The mini-assessment we just did should inform your issues, but don't necessarily limit yourself to the customer needs or gaps identified earlier. There are other factors at work that we haven't discussed and that you may know to pose critical issues.

For example, you have to do some things required by WIA, such as create a youth council and a process for certifying eligible training providers. You have to identify what your one-stop system should look like; who the key partners are; who will have direct responsibility for programs, services, establishing linkages; and how you will hold program and center operators accountable. These may be critical issues for some of you.

Others of you might think that the Board must develop a stronger, more compelling long-term vision that gets full buy-in from the community. Don't limit yourself to what you think is expected of you. The issues may be internal to the Board structure, or may relate to the broader community. Just get down what you think are the critical issues.

## **Activity 4: Reaching Consensus**

- **Work in small groups**
- **Compare your “top 5” lists**
- **Reach consensus on the “top 5” for your group**
- **Write your list on a flipchart**
- **Select a spokesperson**
- **You have 20 minutes**



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I will randomly divide you into groups of 5-8 that will sit at assigned tables. In your groups, compare your “top 5” lists, then work by consensus to agree on a list of the 5 most important issues faced by your Board. Remember the rules of consensus. Everyone has input, everybody listens. Everyone can live with and support the final decision. Once you’re in your groups, select a spokesperson to give us a brief overview of the reasons the group selected these issues.

Before you get started, I want to offer some tips on selecting priorities from what might be long list of issues, all of which seem critical. [Next slide.]

[After small group work, and before starting the presentations]

Okay, let’s hear from each group. During the presentations, if anyone wants to ask a question, please raise your hand and I will make sure you get a chance to ask. While the presentations are being given I will be making a master list of the issues on the flipcharts at the front of the room.

## ***Criteria for Selecting Priorities***

- **Big ticket - high impact**
- **Low hanging fruit - easily achieved**
- **Spread effect - solve a problem and prevent other**
- **Visibility - widely noticed, positive effect on others**
- **Urgency - timeliness**

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There are lots of criteria we can use to set priorities.

- 1) Is the issue a “big ticket” issue. Will addressing this need or solving this problem have a big impact on the system?
- 2) Is the issue “low hanging fruit?” In other words, can we achieve this goal easily? I always recommend selecting at least one item that fits this bill, just to see some fast results for your work.
- 3) Will solving this problem have a “spread effect?” Will doing so prevent other problems?
- 4) Will achieving this goal have high visibility? Will the press come flocking, as they always do to good news?
- 5) Finally, urgency -- do we have to deal with this now, either because the law requires us to or because not doing so will prevent us from moving forward?

You can use the worksheet in your packets to list each issue, then check off which criteria apply to each issue. Those that have the most “checks” may be your top priorities.

[Go back to the previous slide during the activity.]

## **Activity 4 (continued)**

- **Review all “top 5” lists**
- **Combine topics as needed**
- **Reach consensus on the Board’s “Top 5” list**
  - Get clarification of any issues
  - Use multi-voting or criteria
  - Discuss results to ensure consistency with vision



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All of the issues identified by the work groups appear on the flipcharts at the front of the room. Now, I would like the whole group to look at the entire range of issues, and we will develop a list of priority issues for your Board. Please remember that this is still a consensus process.

First, are there any issues that are duplicative or can be combined? Second, before we begin to prioritize these priority lists, are there any questions of clarification about what any of these words mean or issues refer to?

Okay, let's vote. Everyone has 5 votes, and I want all of you to come up and put a check mark next to your top issues. You can put 1 check mark next to 5 issues, or you can put more than one check mark on any issue that you think is especially critical. You can even put all 5 on one issue if you'd like.

[Check to ensure that everyone can live with the “top 5” list. If there is not consensus, discuss further, or table the discussion and move ahead with a smaller list that everyone agrees on.]

## ***Planning: Set Strategic Goals***

- **Consistent with your mission and vision**
- **Based on trends, gaps, and customer needs identified in your assessment**
- **Realistic**
- **Measurable**
- **Achievable**

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- Now we're ready to start developing strategic goals. In general, your goals are based on the information considered during the assessment phase of planning and should move your organization toward achieving its vision for the community.
- You've identified where you want to go. You've considered where you are now and what might stand in your way of getting to where you want to go. Now you develop the strategies to move you from here to there. You will be looking for the best ways to satisfy customer requirements, build on existing strengths, address current weaknesses.
- Your goals should be realistic (can you really accomplish this given your resources, opportunities and barriers?); measurable (otherwise, how will you know when you've succeeded?); and achievable (don't set yourself up for failure!).
- Let's talk more about measures....

## ***Identifying Measures***

- **You don't want to track everything**
- **You only want to measure what's most critical to tracking progress**
- **Focus on system outcomes, and let staff worry about program-specific measures**

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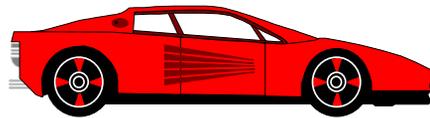
- You can't track everything, just those measures that are critical. Think about what you need to know to check whether you're on track or not. If you don't need something, don't take the time to track it, discuss it, analyze it. Use the limited meeting time that you have to focus on a few key measures that will let you know how you're doing.

- I know that all of the programs that you oversee have required measures, and someone will need to track those. The Board is accountable for them, so you can't ignore them. However, they may not be the only measures that you should focus on as a board.

- You should be focused on systems and cross-cutting measures, measures that will be meaningful when you talk about what you are doing and what you've accomplished in your community. The required program-specific measures typically are not cross-cutting, may not mean a thing to the average person, and they may not relate to your strategic goals.

## Identifying Measures

- **Think of measures as your “dashboard”**
  - In a car, we have a gas gauge, speedometer, oil gauge, odometer, tachometer, temperature gauge
  - What data do you need to know whether you are getting where you want to go?



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-Think of your measures as your “dashboard.” In your car, you have access to the information you need to avoid troubles along the road. You have your speedometer, so you won’t get pulled over. You have your gas and oil gauge to make sure you don’t run out. Your odometer gives you an idea of how much wear and tear your engine’s gone through. And the tachometer and temperature gauge tell you how hard your engine’s working, so you don’t overheat.

- I’m sure there’s lots more data you could get. You could track the number of tire rotations per minute, or the average number of minutes your fan runs per hour, or perhaps the wind resistance. This is interesting and may even help you in some marginal way to get where you want to go. But are they critical measures? If you added all this data to your dashboard, would you be able to focus on the most important data, like your gas level?

- When you’re defining your measures, think of them as your dashboard. What’s the critical information you need to make sure you can get where you want to go?

## ***Example***

- **Issue: Employers need more qualified job seekers**
- **Strategic Goal: Improve workers' education levels and skills**
- **Performance Measure: Percentage of workers with post-high school skill certifications or degrees**
  - Performance Goal = 65%

Let's consider an example of what you're going to do.

## Activity 5: Identifying Goals

- **For each issue, develop measurable goal(s)**
  - *“We will increase/decrease....”*
  - *“We will improve....”*
  - *“We will expand....”*
- **Establish measures of progress**
  - With short- and long-term performance goals



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- Okay, so let's keep going on your plan.
- I'm going to divide you into 5 groups. Each group will take one priority issue and create a goal statement, and related objectives if appropriate. When you write your goals, I encourage you to use some of the verbs listed here, such as “we will increase or decrease....” or “we will improve or expand....”. This type of language will help point you toward the appropriate measures of progress.
- Then for each goal, identify (if you can) the measure you will use to track your progress. WIA asks you to set 5-year goals for your system, but short-term performance goals are equally important. Where will you need to be in 6 months, in 2 years, in 3 years? You will develop your goal statement(s) along with measures, if possible. If you can't develop these measures today (because we run out of time or you want to consult with some measures “experts”), that's okay. Just do as much as you can.
- Any questions?
- You have 20 minutes. Be sure to record your work on a flipchart and identify a spokesperson who can report out.

[After each group reports out, allow others to ask questions or raise issues/concerns. Make sure the group knows that they can table issues that can't be resolved quickly-- just identifying and raising them today is an accomplishment.]

## ***Act: Get Ready for Action!***

- **Designate responsibility**
- **Set target dates**
- **Identify the resources**
- **Identify the data sources to track progress**
- **Build in continuous improvement**

Now that you've developed your goals and identified key measures, we get to the phase most people like a lot better than planning--the doing phase. This is the phase where you will develop and implement an Action Plan. [Some people call this an Operational Plan.]

The key to success is to develop precisely defined tasks with clear designations of responsibility. Equally important will be the specification of short-term deadlines to monitor whether sufficient progress is being made. Be sure that the deadlines can be measured by hard "data" that provides a realistic assessment of progress. Also make sure that you specify when and in what format Board members will receive progress reports.

## ***Activity 6: Developing Action Plans***

- **Identify steps**
- **Specify who is responsible for specific tasks**
  - Delegate to staff when possible
- **Set target dates and milestones**
- **Establish tracking and review procedures**



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Let's do it. Working in your same groups, let's take each goal (or objective, if any) and create specific action plans. What steps will you take to get there? Who is responsible? Remember that you as a Board are not necessarily the only people available to do work. Use staff as much as possible, but also recognize that some steps, such as inviting a new partner to the table, might require that one of you do it.

Set your target dates for accomplishing these steps, then establish procedures for tracking and reviewing your progress. Who will keep track and report out to the group? Who should hear the reports? How often?

Vision

Assess

Plan

Act

Measure

***“If I had had more time, I would have written a shorter letter.”  
- Mark Twain***

**Be concise, precise, specific**

As you're working, remember Mark Twain's point. The qualities listed here are the benchmarks you should use when judging your own work. Remember a good plan provides clear, specific direction for action.

That is one reason why we are using the flipcharts in your work today. Our experience shows that using participant notes or even laptops is not as effective as flipcharts. It ensures that you're concise. It also ensures that everyone knows what they're agreeing to.

Any questions before we get started?

## ***Act: Implement Your Action Plans***

- **Structure your Board to carry out action plans and achieve goals**
  - **E.g., Permanent subcommittees around each goal**
  - **E.g., Ad hoc subcommittees to accomplish specific tasks**
- **Focus meeting agendas on your progress**
- **Communicate expectations to staff**
- **Save the trees!**

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- You've done a fantastic amount of work today, and I hope you can see the dent you've made in developing your strategic plan. Before we leave, let's talk for a minute about some ways to ensure that the work we've done here doesn't get lost.

- First, you may want to consider how your Board is structured. Is it structured to make the best use of members' time? Can you use a subcommittee structure to focus on achieving specific goals, and reserve full Board meetings to review progress and to review and revise the plan as needed?

- Second, all of you should communicate your vision and goals to your respective staff, and help them see how each organization is a part of this system and plays a key role in determining the outcomes. Think of the organizations in your local workforce investment system as the galley crew in a large boat. Even if everyone is pulling with all their might at the oars, the boat won't reach it's destination if everyone is pulling in different directions.

- Finally, don't make your planning process paper heavy. Make sure your planning documents and progress reports are the types of concise management reports Board members will have the time to review. This will improve the odds of getting better feedback and, in the end, full buy-in.

-Any initial thoughts on these ideas?

## ***Tracking and Improving Performance***

- **Assess performance against goals**
- **Track performance to see trends**
- **Set up a feedback loop for continuous improvement**
  - Look for ways to improve performance
  - Review your plan regularly
    - Has the environment changed?
    - Are there new needs or opportunities?

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- Finally, I urge you to take some time (either in future meetings or in a committee) to establish procedures for tracking and improving your performance, as a Board and as a system.

-How will you address unanticipated obstacles or new opportunities?

- How will you even spot significant changes in your operating context? You do not want to implement systems/programs/ services that address yesterday's problems.

- How often will you review this plan? And is that something the entire Board needs to do, or should you establish a planning committee?

- Just some final suggestions to try to make sure that this planning process doesn't just fall by the wayside, but actually helps you stay on top of the challenges that are sure to come.

## ***Wrap-Up***

- **Next steps**
- **Thank you for all your hard work!**



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I just want to remind you that I will develop a hard-copy report documenting your work. Please review it to make sure it accurately reflects that work. The Board chair will let you know the process for distributing the report. Are there any last action steps anyone wants to document before we break up? Once again thank you for all your hard work.