

# Introducing Our Strategic Planning Process & Committee

Prepared for the Saint Martin's Community

Presented by President Jennifer Bonds-Raacke

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# WHAT IS STRATEGIC PLANNING?

According to Harvard Business School, strategic planning is the ongoing organizational process of using available knowledge to document a business's intended direction.

This process is used to:

- prioritize efforts,
- effectively allocate resources,
- align shareholders and employees on the organization's goals, and
- ensure those goals are backed by data and sound reasoning.



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# WHAT IS OUR STRATEGIC PLANNING APPROACH?

The Strategic Planning process at Saint Martin's will be:

- Led by a Strategic Planning Committee co-chaired by President JBR and Controller Ellie Sesin; Representatives from stakeholder groups (staff, faculty, administration, Abbey and Board)
- Agile - using a Lean-based process that includes an annual Strategy Assessment and refinement; the Plan is a living document
- Inclusive - offering opportunities for insights and ideas to be shared from all members of the community; supports the Catholic principle of Subsidiarity
- Measurable - with clearly defined owners, deliverables, resources, metrics and due dates (SMART goal approach)
- Transparent - providing monthly annual improvement project (AIP) status/scorecard updates and quarterly Strategy Reviews presented to the Full Board
- Aligned with SMU's operating framework, budgets and available resources
- Provides professional development opportunities and visibility for our high performing team members to lead projects



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# 3 PHASES OF STRATEGIC PLANNING<sup>1</sup>



- |  |   |   |
|--|---|---|
| 1. Annual Review of Strategic Plan Performance | 4. Institutional Visioning & Strategic Priorities | 9. Deploy Annual Improvement Projects (AIPs)                          |
| 2. Institutional Self Assessment               | 5. Strategy Statements & Objectives               | 10. Quarterly Reviews of Strategic Plan Performance at Board Meetings |
| 3. Industry/Environment Analysis               | 6. Annual Improvement Projects (AIPs) (1 year)    |   |
|  | 7. Annual SP Budget                               |   |
|  | 8. Align & Approve AIPs w/ Budget & Leaders       |   |

1. Adapted from the Lean Hoshin Kanri Strategic Planning process.



# STRATEGY ASSESSMENT

Strategy Assessment Step	Responsible	Outputs
1. Annual Review of Strategic Plan Performance	President's Cabinet Presents to Board of Trustees	SP/AIP Final Status Report Formal Assessment of Process & Performance
2. Institutional Self Assessment	President's Cabinet Presents to Board of Trustees	SWOT Analysis Benchmarking (Aspirants, Competitors) Findings from Primary Research, Climate Surveys & Other Voice of Community Sources
3. Industry/Environment Analysis	President's Cabinet Presents to Board of Trustees	State of the Industry Research, Socio-Economic, Demographic, Political, Regulatory, Technological Trends



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# STRATEGY DEVELOPMENT

Strategy Development Step	Responsible	Outputs
4. Institutional Visioning & Strategic Priorities	Board of Trustees & President	Vision, Mission, Values Statements, Strategic Priorities
5. Strategy Statements & Objectives	President & SP Committee Present to Board of Trustees	Strategy Statements & Objectives, Metrics, High-level Roadmap
6. Annual Improvement Projects (AIPs)	President's Cabinet AIP Leaders	AIP Charters, AIP Plan
7. Annual SP Budget	President's Cabinet Led by CFO, Approved by Board	Annual SP Budget
8. Align & Approve AIPs w/ Budget	President's Cabinet Let by President, Approved by Board	Approved Annual SP Budget Approved AIPs w/ Budget & Leaders



# STRATEGY DEPLOYMENT

Strategy Deployment Step	Responsible	Outputs
9. Deploy Annual Improvement Projects	President’s Cabinet Division/Dept Administrators AIP Leaders	AIP Team Appointments AIP Team Kickoff Meeting AIP Project Charter & Plan AIP Project Implementation AIP Scorecard
10. Quarterly Reviews of Strategic Plan Performance	President’s Cabinet Division/Dept Administrators	AIP Scorecard & Status Update



# WHAT MAKES STRATEGY DEPLOYMENT SUCCESSFUL?

1. Gain community commitment to the Strategic Plan
2. Align roles and resources to the Strategic Priorities (People, Place, Purpose, Performance) and Annual Improvement Projects (AIPs)
3. Communicate the process, priorities and metrics clearly to team members
4. Measure, monitor and communicate performance
5. Be agile and willing to reassess when new opportunities or challenges arise



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# NOTIONAL TIMELINE

STRATEGIC PLAN  
COMMITTEE,  
PROCESS, CALENDAR

▲  
Sept. 20 –  
Nov. 7

STRATEGY  
ASSESSMENT

▲  
Nov. 8 –  
Dec. 23

STRATEGY  
DEVELOPMENT

▲  
Jan. 3 –  
May 30

STRATEGY  
DEPLOYMENT

▲  
June 1+

Monthly AIP Updates;  
Quarterly Reviews at  
Board Meetings



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# STRATEGIC PLANNING COMMITTEE

Co-chairs: President JBR; Finance Controller Ellie Segin

Monastic leader: Father Kilian Malvey, O.S.B.

Trustee: Tedi Reynolds '71

Faculty: Faculty Senate President Dr. Tam Dinh; Dr. Todd Barosky

Staff: Nedra Robertson (Human Resources); Abigail “Abby” Kheriaty (Admissions & Staff Welfare Committee representative)

Strategic Plan Process & Project Coach: Consultant Jenn Christiansen



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# TERMINOLOGY

## OUR FOUNDATION

1. Founding traditions - Catholic, Benedictine, Liberal Arts
2. Mission - why we exist
3. Vision - what we aim to accomplish
4. Themes - Faith, Reason, Service, Community
5. Rules of Benedict, Hallmarks of a Benedictine Education
6. Strategic Priorities - People, Place, Purpose, Performance

## STRATEGY

7. Strategy Statements - brief statements that clearly, simply describe the institutional-level strategy to be achieved during the defined period (June 2023-June 2026)
8. Initiatives - brief statements that clearly, simply describe the areas of focus and actions necessary to achieve the institutional-level strategies
9. Annual Improvement Projects (AIP) - projects that are clearly defined, scoped, planned, resourced and measured to deliver tangible results necessary to advance an initiative during a one-year period
10. AIP Charter & Plan - a traditional project plan with a standard format
11. AIP Leader - responsible for managing the project, team and resources
12. AIP Scorecard - a one-page executive summary of all AIP performance



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# HOW TO GET INVOLVED ...

## STRATEGY ASSESSMENT

### VOICE OF COMMUNITY

1. Participate in institutional surveys & research
2. Attend listening & ideation sessions
3. Provide input to a member of the Strategic Planning Committee or President's Cabinet

## STRATEGY DEVELOPMENT

### CREATING OUR PLANS

4. Engage in the Request for Proposals for Annual Improvement Projects by submitting and presenting a project proposal to the Strategic Planning Committee
5. When AIPs are selected, express your interest in working on an AIP if it aligns with your role and passion

## STRATEGY DEPLOYMENT

### TURN STRATEGY INTO ACTION

6. Support the AIP teams
7. Stay up-to-date on communications related to Strategic Plan and AIP status updates



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# NEAR-TERM FOCUS

## DECEMBER

- SPC completes Institutional Self-Assessment
- SPC completes External Environment/Industry Analysis
- SPC presents a summary report and presentation to President's Cabinet → Board (Feb.)

## JANUARY

- Board validates Strategic Foundation items (mission, vision, values, etc.)
- SPC considers SMU's strategic needs and a range of institutional strategies; prioritizes to Top 3-5
- SPC drafts Strategy and Initiatives Statements aligned with Top 3-5; presents to President's Cabinet → Board (Feb.)



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# Questions?



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