BMI Year 4 Case Study Work and Teams

- In teams, you will complete work assignments and report out briefly.
 - SWOT analysis
 - Strategy map (mission, vision, values, strategic goals)
 - Activity Scope related to one strategic goal
 - Presentation (including how your team functioned)

Organizational Support For Strategic Planning

Instructions

This instrument will help you and your fellow participants examine the strength of support in you organization for effective strategic planning. Sixteen conditions which foster effective strategic planning are listed below. Consider to what extent each condition is present in your organization and state your feelings by circling the number that best corresponds to your opinion. Add all of the circled numbers and write the total in the box provided.

				Almost
	,	Some-what	,	Completely
	Present	Present	Present	present
Clarity of responsibilities between operation units	0	1	2	3
Successful history with planning and implementation	0	1	2	3
Prior skills in planning	0	1	2	3
Effective communication and feedback systems	0	1	2	3
Rewards for long-term thinking and action	0	1	2	3
Available information on the organization's business activities	0	2	4	6
Available information on the organization's business environment	0	2	4	6
Sufficient time and attention given to planning tasks	0	2	4	6
Good relations between segments of the organization	0	2	4	6
Desire among managers to do strategic planning	0	2	4	6
Financial and political stability	0	3	6	9
Willingness to take calculated risks	0	3	6	9
Demonstrated creativity	0	3	6	9
Demonstrated flexibility and adaptiveness to change	0	3	6	9
Skill at group process and interpersonal relations	0	3	6	9
Commitment of the senior leader to planning	0	3	7	10
	Successful history with planning and implementation Prior skills in planning Effective communication and feedback systems Rewards for long-term thinking and action Available information on the organization's business activities Available information on the organization's business environment Sufficient time and attention given to planning tasks Good relations between segments of the organization Desire among managers to do strategic planning Financial and political stability Willingness to take calculated risks Demonstrated creativity Demonstrated flexibility and adaptiveness to change Skill at group process and interpersonal relations	Successful history with planning and implementation Prior skills in planning Effective communication and feedback systems Rewards for long-term thinking and action Available information on the organization's business activities Available information on the organization's business environment Sufficient time and attention given to planning tasks Good relations between segments of the organization Desire among managers to do strategic planning Financial and political stability Willingness to take calculated risks Demonstrated creativity Demonstrated flexibility and adaptiveness to change Skill at group process and interpersonal relations	Clarity of responsibilities between operation units 0 1 Successful history with planning and implementation 0 1 Prior skills in planning 0 1 Effective communication and feedback systems 0 1 Rewards for long-term thinking and action 0 1 Available information on the organization's business activities 0 2 Available information on the organization's business environment 0 2 Sufficient time and attention given to planning tasks 0 2 Good relations between segments of the organization 0 2 Desire among managers to do strategic planning 0 2 Financial and political stability 0 3 Willingness to take calculated risks 0 3 Demonstrated creativity 0 3 Demonstrated flexibility and adaptiveness to change 0 3 Skill at group process and interpersonal relations 0 3	Clarity of responsibilities between operation unitsPresentPresentPresentSuccessful history with planning and implementation012Prior skills in planning012Effective communication and feedback systems012Rewards for long-term thinking and action012Available information on the organization's business activities024Available information on the organization's business environment024Sufficient time and attention given to planning tasks024Good relations between segments of the organization024Desire among managers to do strategic planning024Financial and political stability036Willingness to take calculated risks036Demonstrated creativity036Demonstrated flexibility and adaptiveness to change036Skill at group process and interpersonal relations036

Total Score (100 possible):



EXAMPLE: UW Enrollment Management (EM) - Strategy Map for 2014-2017 (Final)

Mission

Guide the University in developing and implementing strategies to enroll, support, and graduate a diverse, world-class student body

Vision

EM is a recognized leader in the use of intentional, informed, and integrated practices that optimize enrollment, student success, and institutional outcomes

Values (*UW)

Diversity* Excellence*
Respect* Transparency
Integrity* Strategic Action
Innovation* Service

Focus on Students/Partners

Lead efforts to improve the student experience

Welcome students and make it as easy as possible to navigate the UW's systems, policies, and processes

Collaborate with the UW community to optimize student enrollment outcomes

Integrate "Husky Experience" and University branding into our work

Improving Internal Business Practices

Develop and integrate policies and practices across units in support of EM goals

Use data to optimize enrollment strategies

Develop and communicate key performance metrics

Build Organizational/Staff Capacity

Create professional development and recognition opportunities for all staff

Develop effective leadership and management skills

Build and resource an effective EM organizational structure

Improve communication within EM for all staff

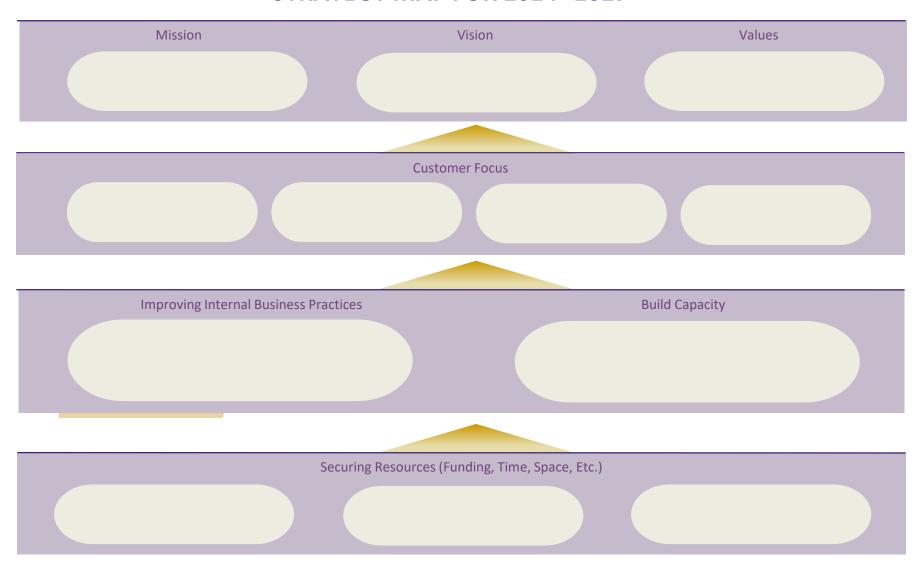
Securing EM's Financial Future – Enhance Resources

Build a sustainable fiscal plan

Secure and support robust IT infrastructure

Finalized: December 19, 2014 Red: FY15 priorities

STRATEGY MAP FOR 2024-2027



Drafted/Updated:_____

PLANNING – ACTIVITY SCOPE/WORK CHARTER

8/17/2015 PROJECT NAME: Create One Entry Point for Space Requests (Triage) - Phase 2 DATE: PROJECT DESCRIPTION: Space-related requests are handled by different units at UW; as a result, there are a variety of ways to make and start a request for work. This can lead to confusion, overuse of some avenues for requests/work, delays in starting, and other challenges. 8/7/2015 PROJECT START DATE: PROJECT END DATE: 7/31/2016 PROBLEM TO SOLVE/OBJECTIVE: DELIVERABLES, METRICS AND TIMELINES: Create a single-point portal for all space-related requests at UW Seattle. 1. Space-request portal 2. Ensure data from requests is accessible, reportable, usable, and transferrable Develop a process to evaluate and route requests so they reach the 3. Create process to triage/assign requests to appropriate units appropriate unit for the work. 4. Communicate policy, plans, information about portal to campus users Determine criteria for routing to "Intake Evaluation Team". 8/13-11/2: Weekly team meetings Note: Original team members for Phase 1 were: 11/2: Launch Portal (beta testing with limited users) Rebecca Barnes (OUA) 11/2-1/4: Make changes and enhancements based on user input Jeanette Henderson (UWRE) 1/4: Roll out to campus Ruth Johnston (P&M) Jan-June: Continue to make changes and enhancements Alan Nygaard (CPO) John Seidelmann (OUA) Robert Stickney (CPO) Todd Timberlake (UWRE) Jim Angelosante (Facilities Services) Roberta Hopkins (Classroom Technology and Events) **TEAM MEMBER NAMES** Executive Sponsor(s): Team Members: Paul Jenny (P&M) John Seidelmann (OUA) Mike McCormick (CPD) Alan Nygaard (CPO) Gina Zagala (CPO) Mike Carette (OUA) Janelle Ortega (UWRE) Chris Coyle (CPO) Dan Druliner (P&M) Andy McGhay (CPO) Hannah Eulenberg (CPO) Project Leader(s): Facilitator(s): Jeff Fillmore (P&M/OE) John Seidelmann (OUA) Review Team if needed: Space-Triage Team (original Phase 1 team)

ACTIVITY SCOPE (WORK CHARTER)

PROJECT NAME:		DATE:		
PROJECT DESCRIPTION:				
TROOLET BESCHII TION.				
PROJECT START DATE:	PROJECT END DATE:			
PROBLEM TO SOLVE/OBJECTIVE:	DELIVERABLES AND TIMELINES:			
TEAM MEMBER NAMES				
EXECUTIVE SPONSOR(S):	TEAM MEMBERS:			
PROJECT LEADER(S):	FACILITATOR(S):			
	REVIEW TEAM IF NEEDED:			