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)
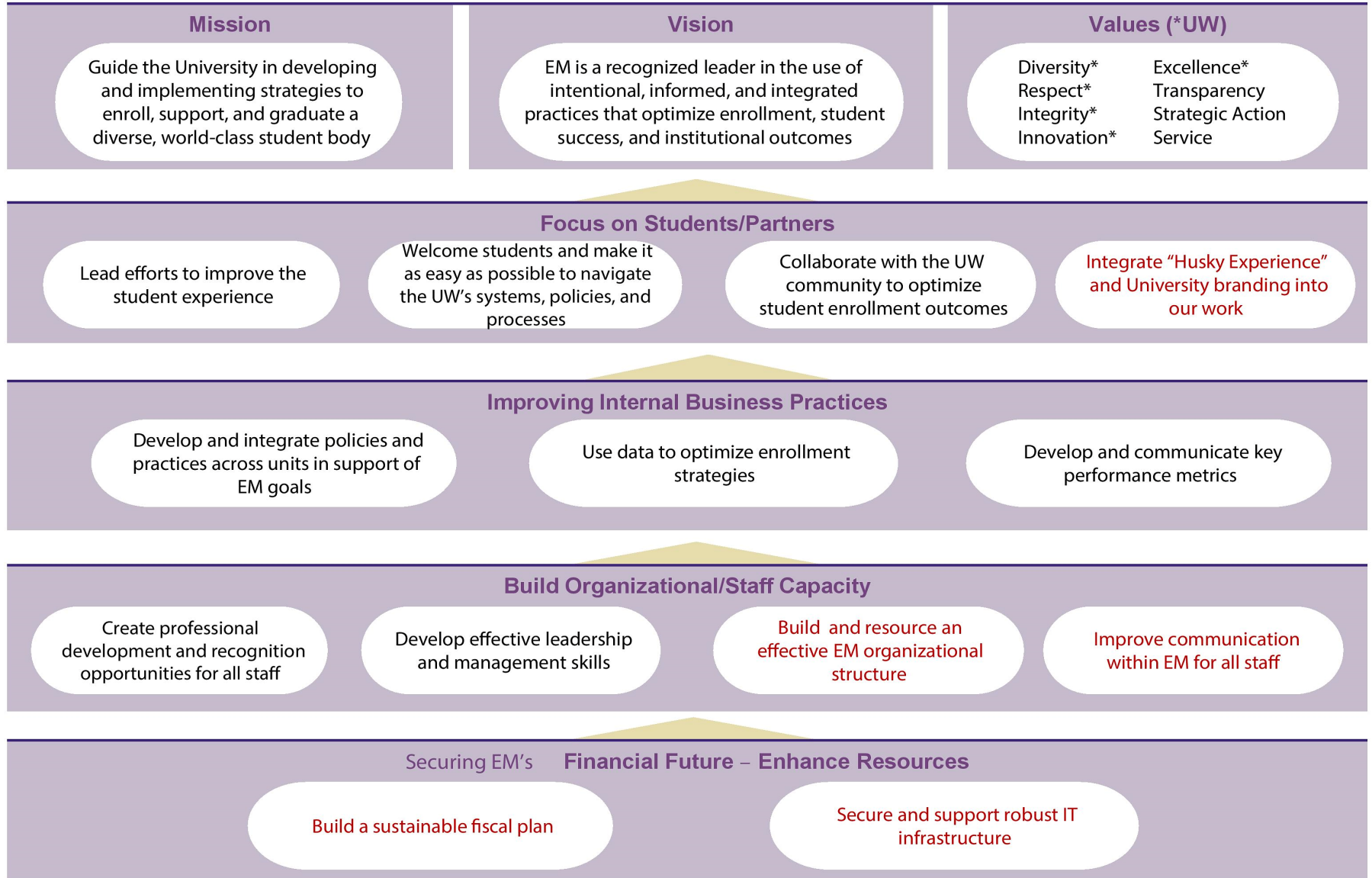
Organizational Support For Strategic Planning

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.

		Not Very Present	Some-what Present	Mostly Present	Almost Completely present
1.	Clarity of responsibilities between operation units	0	1	2	3
2.	Successful history with planning and implementation	0	1	2	3
3.	Prior skills in planning	0	1	2	3
4.	Effective communication and feedback systems	0	1	2	3
5.	Rewards for long-term thinking and action	0	1	2	3
6.	Available information on the organization's business activities	0	2	4	6
7.	Available information on the organization's business environment	0	2	4	6
8.	Sufficient time and attention given to planning tasks	0	2	4	6
9.	Good relations between segments of the organization	0	2	4	6
10.	Desire among managers to do strategic planning	0	2	4	6
11.	Financial and political stability	0	3	6	9
12.	Willingness to take calculated risks	0	3	6	9
13.	Demonstrated creativity	0	3	6	9
14.	Demonstrated flexibility and adaptiveness to change	0	3	6	9
15.	Skill at group process and interpersonal relations	0	3	6	9
16.	Commitment of the senior leader to planning	0	3	7	10

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

3

STRATEGY MAP FOR 2017 - 2020

Mission	Vision	Values

Customer Focus

Improving Internal Business Practices	Build Capacity

Securing Resources (Funding, Time, Space, Etc.)

Drafted/Updated: _____

PLANNING – ACTIVITY SCOPE/WORK CHARTER

PROJECT NAME:	Create One Entry Point for Space Requests (Triage) - Phase 2	DATE:	8/17/2015

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.

PROJECT START DATE: 8/7/2015	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. Develop a process to evaluate and route requests so they reach the appropriate unit for the work. Determine criteria for routing to "Intake Evaluation Team". *Note: Original team members for Phase 1 were:* Rebecca Barnes (OUA) Jeanette Henderson (UWRE) Ruth Johnston (P&M) Alan Nygaard (CPO) John Seidelmann (OUA) Robert Stickney (CPO) Todd Timberlake (UWRE) Jim Angelosante (Facilities Services) Roberta Hopkins (Classroom Technology and Events)	1. Space-request portal 2. Ensure data from requests is accessible, reportable, usable, and transferrable 3. Create process to triage/assign requests to appropriate units 4. Communicate policy, plans, information about portal to campus users 8/13-11/2: Weekly team meetings 11/2: Launch Portal (beta testing with limited users) 11/2-1/4: Make changes and enhancements based on user input 1/4: Roll out to campus Jan-June: Continue to make changes and enhancements

TEAM MEMBER NAMES

Executive Sponsor(s):	Team Members:
Paul Jenny (P&M) Mike McCormick (CPD)	John Seidelmann (OUA) 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):**
John Seidelmann (OUA)	Jeff Fillmore (P&M/OE)
	Review Team if needed:
	Space-Triage Team (original Phase 1 team)

ACTIVITY SCOPE (WORK CHARTER)

PROJECT NAME:	DATE:

PROJECT DESCRIPTION:

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: