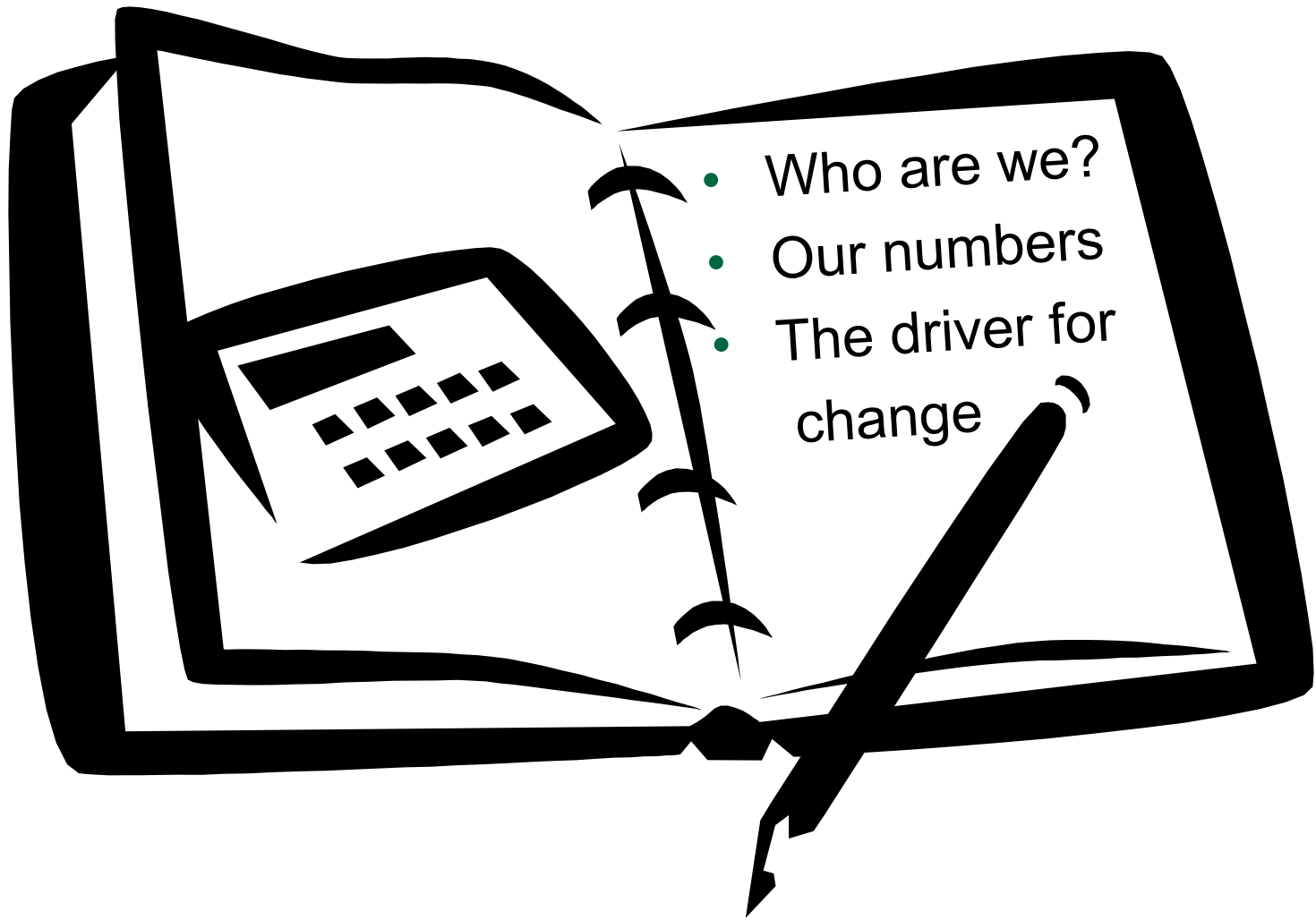


**THE JOURNEY TO A
DEPARTMENTAL
STRATEGIC PLAN**

Our Story

Prologue – Some background



Who are we?



Our Numbers

- Annual contribution to the College approx. 3.5 million
- Plus contribution to CAS Reserve Fund of approx. 1 million
- Plus contribution to College overhead of approx. 1.4 million
- Approx. 200 full and part-time College staff
- 13 College operated businesses including one franchise
- Residence management and vending out-sourced.



The Driver for Change

Lucky page 7

Business Plan 2013-2014

OPERATIONAL OUTCOMES, MAJOR ACTIONS AND MEASURES (CONTINUED)



2012-17 Strategic Goals	2013-14 Initiatives	2013-14 Measures
Financial Sustainability		
Goal 9: Align our funded operational expenditures with provincial funding.	FS 9.1 Prepare a multi-year strategic plan cost and estimate progress report.	Strategic Plan progress report presented to President's Council.
	FS 9.2 Develop a Procurement Strategy to ensure best value for money, Broader Public Sector Directives compliance, encourage strategic partnerships and optimize relationships with the vendor community.	Procurement Strategy approved by College Leadership Council.
Goal 10: Expand non-funded opportunities to increase revenue.	FS 10.1 Develop a strategic plan for College Ancillary Services with the goal of doubling net contribution within five (5) years.	College Ancillary Services Strategic Plan prepared and approved by President's Council.
	FS 10.2 Implement the International Education Centre's strategic plan aimed at growing contract activity and enrolment.	1,006 FTE international students enrolled at the College.



Chapter 1 – Where to start?



A Look at the Management Team

- Acting General Manager of Food Services
 - Short staffed
 - Opening our first branded location on campus in 8 short weeks
- General Manager of Retail Services
 - Operating 2 stores
 - Renovating the Tea Shoppe within the Campus Store due to a minor leak that caused massive damage
- Parking Services Manager
 - Also manages our AC Card program, Coin Operations and Lockers
 - Backlog of vacation owed
- Print Services Manager
 - Focused on an unprecedented Print Strategy to remove all desktop printers at the College



A Look at the Management Team

- Marketing and Conference Services Manager
 - Short staffed
- Business Administrator
 - Relatively new to the department
 - Lots of previous experience
- Acting Director
 - Handed the department with little notice
 - Trying to transition our of Food Services
- How are we going to get this done (and done well)...and still keep the \$40m engine churning???



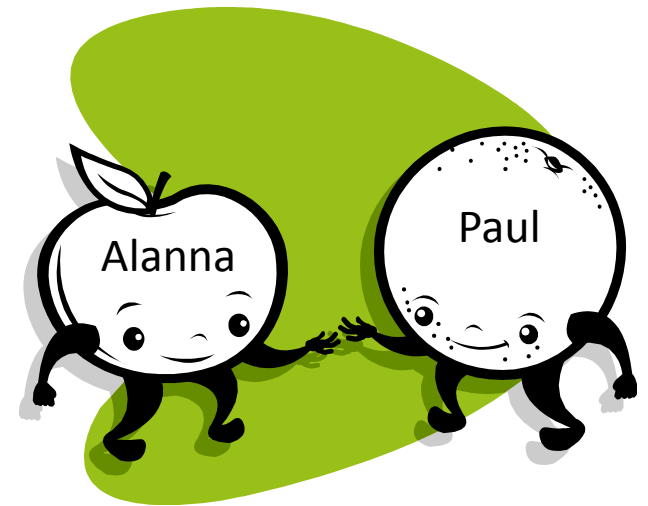
Selecting a Strategic Plan Steering Committee

- **Question 1** - What skills or attributes are needed?
 - Courageous leadership
 - Ability to think outside the box
 - Financial savvy to figure out the numbers to get us to doubling the bottom line
 - Communications skills
 - Historical insight into the department
 - Fresh perspectives
 - Thick skin



Selecting a Strategic Plan Steering Committee

- **Question 2 – Who can bring these skills to the table?**
 - Acting Director asked:
 - Marketing and Conference Services Manager
 - Communication skills
 - Historical Insight
 - Apples
 - Business Administrator
 - Financial savvy
 - Fresh Perspective
 - Oranges
- A Team of 3 focused individuals.



Developing a Project Plan

- Select a tool to document and track your steps:
 - We used a Gantt Project Planner template
 - Download for free from [here](#)
 - You could also use MS Project
 - Or your own favorite tool

Just start writing

- Put as many steps down as you can think of
- You will add more as you go
...as things present themselves

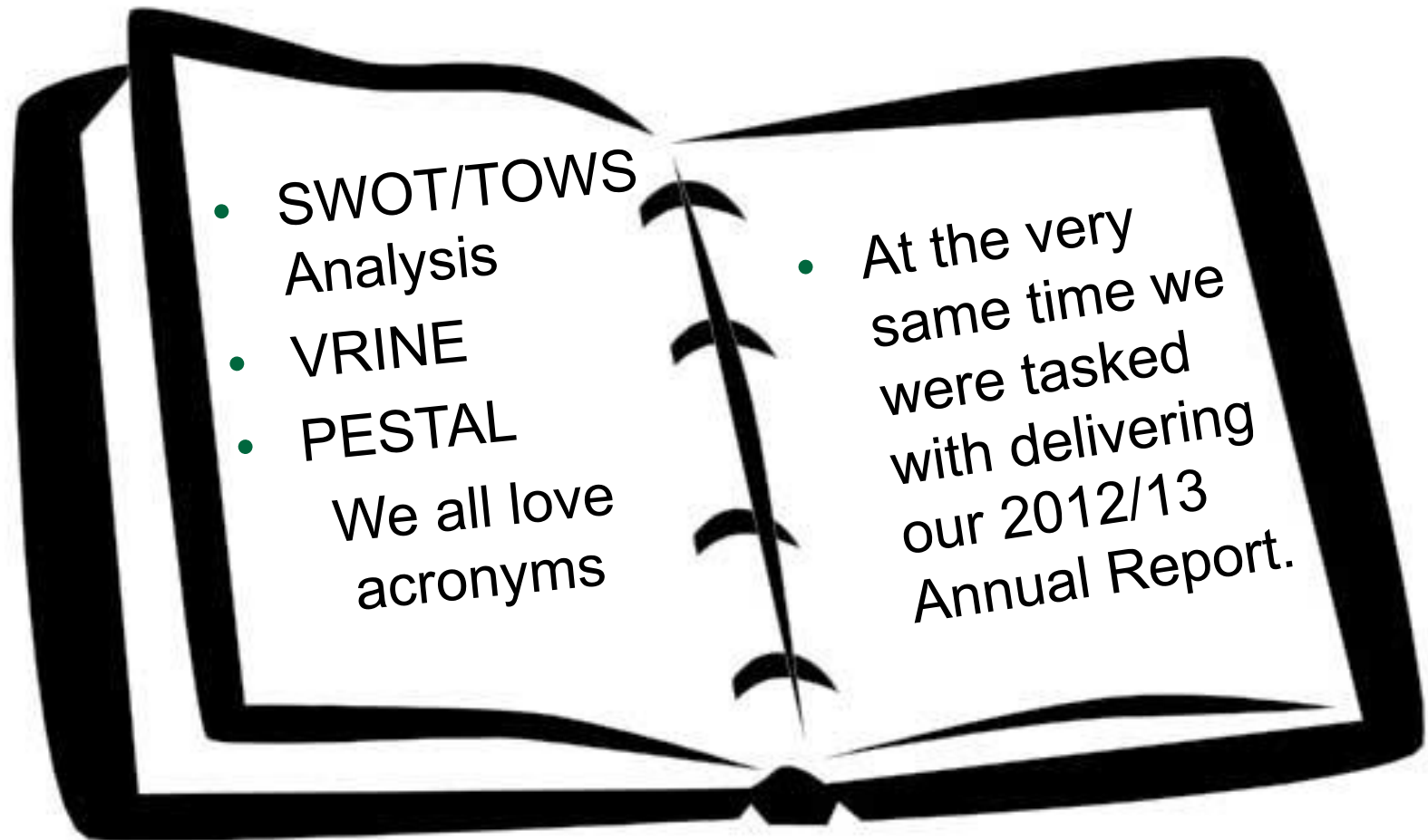
Ancillary Strategic Plan Project Plan

Period Highlight:

ACTIVITY	PLAN START	PLAN DURATION	ACTUAL START	ACTUAL DURATION	PERCENT COMPLETE	PERIODS			
						12-Aug-13	19-Aug-13	26-Aug-13	2-Sep-13
Develop CAS working group structure	1	1	1	1	100%	1	2	3	4
Develop Project Plan	1	3	4	2	25%				
Completion CAS 5 Year Strategic Plan Document	1	12	1	12	60%				
Complete 5 Year Proforma	1	4	1	8	50%				
Review CAS Mission Statement	2	3	2	5	90%				
Define Balanced Scorecard Pillars	2	3	2	3	90%				
Map Balanced Scorecard to College Strategic Plan	3	5	3	8	25%				
Develop 2 Way Communication Plan	4	2	5	2	10%				
Environmental Scan, SWOT/TOWS Analysis	5	3	5	3	5%				
Internal/External Competitive Analysis	5	2	5	2	0%				
Individual Meetings with Business Managers	5	2	5	2	0%				
Business Units Align Goals to Balanced Scorecard	6	3	6	3	0%				
Establish performance metrics-Balanced Scorecard	6	3	6	3	15%				



Chapter 2 – Figure out where you are



SWOT/TOWS Analysis

- Most people have heard of a SWOT Analysis
 - A strategic planning tool that involves listing an organization's:
 - **S**trengths – things we do well, advantages
 - **W**eaknesses – things we do poorly, disadvantages
 - **O**pportunities - external factors that could benefit the organization
 - **T**hreats - external factors that might harm the organization
- What is a TOWS Analysis?
 - The same basic process
 - Threats and opportunities are examined first and weaknesses and strengths are examined last.



SWOT/TOWS Analysis

- Michael Watkins of the "Harvard Business Review"
 - “Focusing on threats and opportunities first helps lead to productive discussions about what is going on in the external environment rather than getting bogged down in abstract discussions about what a company is good at or bad at.”
- So how do you do a SWOT/TOWS
 - Step 1 - Make a bulleted list of:
 - Threats
 - Opportunities
 - Weaknesses
 - Strengths
 - Step 2 – Make a bulleted list of:
 - Strategies that use strengths to minimize threats.
 - Strategies that use strengths to maximize opportunities.
 - Strategies that minimize weaknesses and avoid threats.
 - Strategies that minimize weaknesses by taking advantage of opportunities.



SWOT/TOWS Analysis

This is what ours looked like after Step 1

<p>Ancillary Services</p>	<p>Strengths</p> <ul style="list-style-type: none"> • CAS capital reserve fund • Campus client base • College resources and expertise • Proven profit centre for the College • Updated infrastructure • Our people: Employees and Management Team 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Consistency of financial performance • Marketing and communication strategy • Speed of implementing continuous improvement • Technology strategy • Decisions based on analytics and customer relationship management • Determining alternate revenue streams
<p>Opportunities</p> <ul style="list-style-type: none"> • Leveraging social media and digital channels • Centralized Ancillary Service Centre • Alternate revenue sources and enhanced services • Price/value communication package • Digital and e-commerce delivery • Partnerships and branding 	<p>SO Strategies</p>	<p>WO Strategies</p>
<p>Threats</p> <ul style="list-style-type: none"> • Student expectations of online service offerings • Rising education costs for students • Rapid technology advancement • External competition: College Square, Centrepointe, etc. • Online competition 	<p>ST Strategies</p>	<p>WT Strategies</p>



SWOT/TOWS Analysis

Department Name:

	Strengths	Weaknesses
Opportunities	SO Strategies	WO Strategies
Threats	ST Strategies	WT Strategies



More Analysis Tools: VRINE

- **V**alue: A resource or capability is valuable if it allows a you to take advantage of opportunities or to fend off threats
- **R**arity: A useful resource or capability that is scarce relative to demand.
 - Valuable resources that are available to most competitors simply puts organizations on the same level
- A resource or capability is **i**nimitable if competitors cannot acquire the valuable and rare resource quickly, or face a disadvantage in doing so
- It is **n**on-substitutable if a competitor cannot achieve the same benefit using different combinations of resources and capabilities
- **E**xploitability: A resource of capability that the organization has the capability to exploit (i.e. the capability to generate value from)



Our Analysis: VRINE

- **V**alue: With Food, Retail, and Print Services, value is created through convenient locations, targeted product selection, and through competitive pricing.
- **R**rarity: At a macro level, Parking Services is a clearly our rarest commodity on campus. At a micro level, when defining rarity as being immediate and conveniently availability - food-services, textbooks, course supplies, and print services.
- **I**nimitable & **n**on-substitutable: Parking has a high inimitability and College branded merchandise provides exclusivity.
- **E**xploitability: Bulletin boards and video-screens



More Analysis Tools: PESTAL

- **P**olitical factors: To what degree the government intervenes in the economy. Examples: tax policy, labor law, environmental law, trade restrictions, tariffs, and political stability.
- **E**conomic factors: Economic growth, interest, exchange and inflation rates.
- **S**ocial factors: Cultural aspects - health consciousness, population growth rate, age distribution, career attitudes safety.
- **T**echnological factors: R&D activity, automation, technology incentives and the rate of technological change.
- **E**nvironmental factors: Ecological and environmental aspects - weather, climate, and climate change.
- **L**egal factors: Discrimination, consumer, employment, health / safety law.



Our Analysis: PESTAL

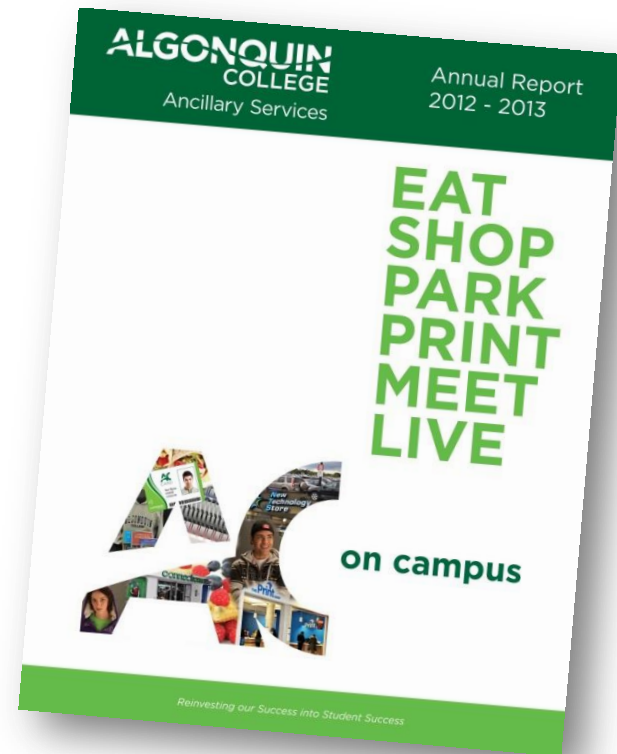
- **P**olitical factors: Ontario colleges are dealing with decreased government funding.
- **E**conomic factors: We have determined price influences our business unit traffic more than any other factor
- **S**ocial factors: Physical accessibility. User-friendly online services. Affordable options.
- **T**echnological factors: Our Point of Sales Systems (POS) currently hold significant information about what, when, where and why our customers make purchases.
- **E**nvironmental factors: Ancillary Services is ready to go green (or greener) and to take an even stronger role in moving the College's environmental initiatives forward.
- **L**egal factors: Responsibility to govern the safe operation of food service on campus.



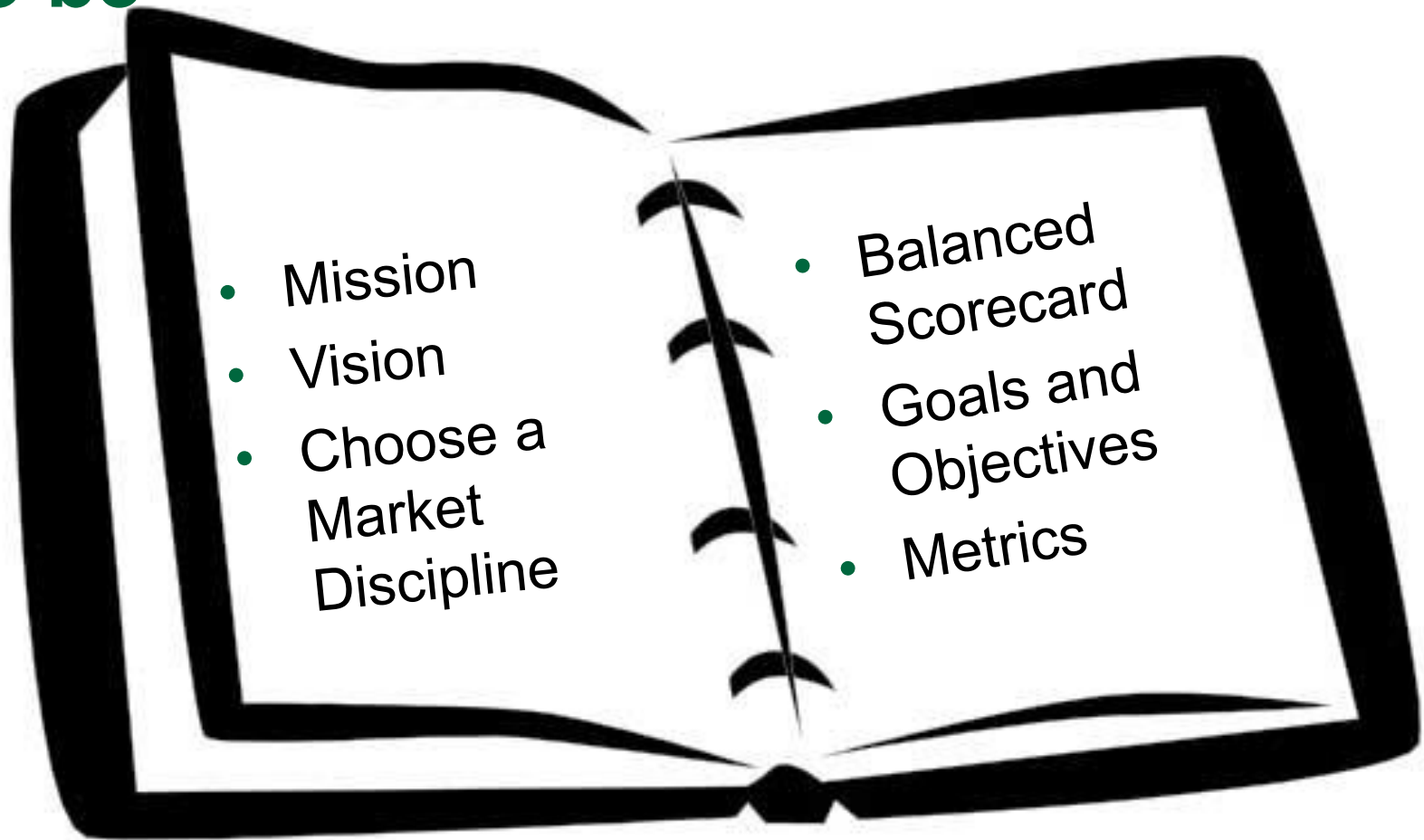
Our 2012-13 Annual Report

- Provided a Strategic Plan process update
 - Initial thoughts
 - Timelines
- Departmental Review
- Financial Review
- Business Unit Update
 - Highlights of Successes
 - Challenges
 - Looking Forward

A timely exercise



Chapter 3 – Figure out where you want to be



Coming up with a Vision and Mission?

Poorly written Vision and Mission statements are lost opportunities for:

- Attracting/engaging/retaining talent
- Building organizational culture
- Increasing productivity while leveraging all resources to successfully implement a strategic plan



What is a Vision Statement?

A Vision Statement:

- Defines the optimal desired future
- Provides guidance and inspiration as to what an organization is focused on achieving in five, ten plus years
- Functions as the "north star" - it is what all employees understand their work every day ultimately contributes towards accomplishing over the long term
- Is written succinctly in an inspirational manner that makes it easy for all employees to repeat it at any given time
- (In 10 years we want) To be x or.. To be x-y or..To be x-y-z
- Ask your team...In 10 years what do we want to be known as..

What is a Vision Statement?

Examples:

- Alzheimer's Association: "Our Vision is a world without Alzheimer's disease."
- Avon: "To be the company that best understands and satisfies the product, service and self-fulfillment needs of women - globally."
- Microsoft: "Empower people through great software anytime, anyplace, and on any device."



What is a Mission Statement?

A Mission statement:

- Defines the present state or purpose of an organization
- Answers three questions about why an organization exists
 - WHAT** it does
 - WHO** it does it for
 - HOW** it does what it does
- Is written succinctly in the form of a sentence or two,
 - Shorter timeframe (one to three years)
- Is something that all employees should be able to articulate upon request



What is a Mission Statement?

Examples:

- Nissan: "Nissan provides unique and innovative automotive products and services that deliver superior, measurable values to all stakeholders in alliance with Renault."
- Target: "Our mission is to make Target the preferred shopping destination for our guests by delivering outstanding value, continuous innovation and an exceptional guest experience by consistently fulfilling our Expect More. Pay Less.® brand promise."



Why we choose not to craft a Mission?

- We are employees of Algonquin College and support the greater mission of the College.

Algonquin College Mission:

To transform hopes and dreams into skills and knowledge, leading to lifelong career success.



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Choose a Market Discipline

“Best Product” – Product Leadership

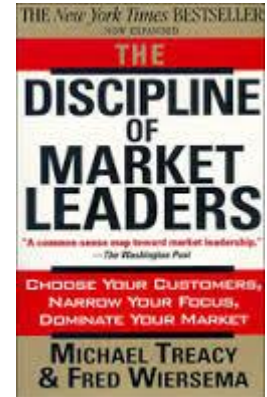
Product Differentiation

Operational Competence

Customer Responsive

“Best Total Cost” – Operational Excellence

“Best Total Solution” – Customer Intimacy



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Why we choose the balanced scorecard approach

- Historically we were just about the bottom line.
- We believe that success isn't just about contribution and dollar signs but it also must include:
 - The customer
 - They employee
 - A model to improve the business engine



CAS Strategic Plan Balanced Scorecard

Student Experience



We will embrace a student focused culture while ensuring that our services are relevant and adaptive.

Employee Growth and Learning



We will provide resources and opportunity to cultivate employee development and recognize successes.

Innovation



We will adapt and align our organizational structure to pursue innovation and experiential learning opportunities that leverage our resources.

Financial Success



We will deliver focused services that significantly contribute to the College's long term sustainability and exceed industry relevant benchmarks

How does this map to your College Strategy?

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Establish your goals and the corresponding objectives

- Our lessons learned:
 - Don't bite off more than you can chew.
 - Keep it simple and focused.
 - Ask yourself - Is it strategic or operational?
 - Remember who your stakeholders are when putting pen to paper.
- In the end this is how ours looked:
 - One goal for each balanced scorecard pillar.
 - 4-6 objectives per goal.



Establish your goals and objectives – Our example

Student experience

Ancillary Services will tailor our services to engage students and deliver a vibrant College experience.

- Encourage healthy lifestyle and environmental sustainability.
- Build trust and customer relationships through client feedback.
- Simplify our in-person and digital service delivery.
- Incorporate student learning opportunities into each of our business units.
- Infuse enjoyment and social responsibility into our culture.

Employee growth and learning

Ancillary Services will empower our team through targeted professional development and employee engagement.

- Initiate programs that support leadership development and job specific training.
- Build trust through open and honest communication.
- Celebrate our successes and acknowledge employee contribution.
- Encourage team building activities when employees assemble.
- Conduct an Ancillary organizational structure review looking for opportunities to support employee growth.

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Establish your goals and objectives – Our example

Innovation

Ancillary Services will seek opportunities to enhance service delivery and capture new business.

- Outline an annual promotions and communication strategy leveraging College partnerships, social media and digital channels.
- Expand services to support the College brand, building pride at all campuses.
- Foster a culture of continuous improvement.
- Implement a technology strategy to enhance ease and speed of service.
- Serve the College as the management conduit for all retail point of sale and digital transactions.
- Seek meaningful external partnerships to build collaborative solutions.

Financial success

Ancillary Services will support the College's long-term financial sustainability.

- Meet budgeted expectations using a balanced scorecard decision making approach.
- Use targeted metrics to optimize business processes and improve results.
- Utilize customer relationship analytics to identify revenue opportunities.
- Establish a platform for the utilization and maintenance of our capital reserves.

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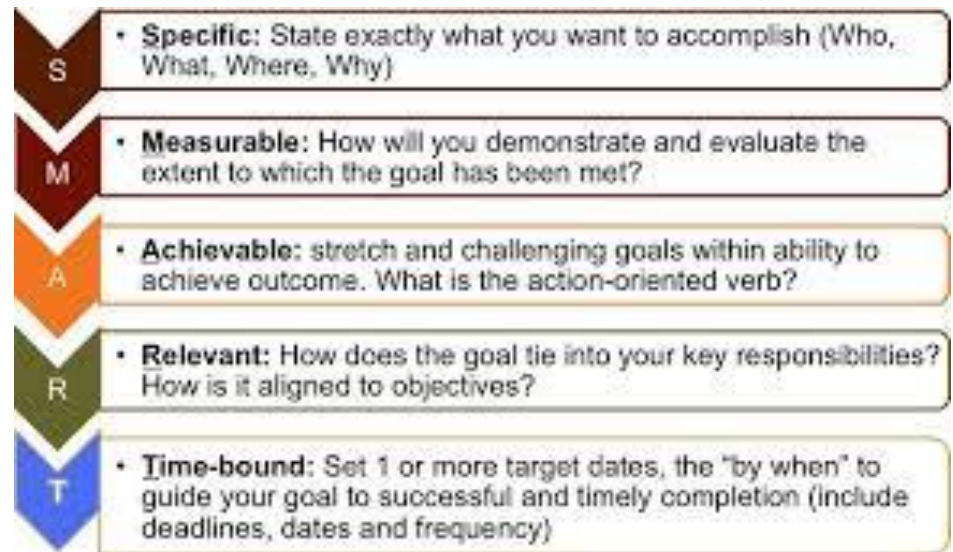
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Set SMART metrics

- What metrics will help you make good decisions?
- What are you already measuring?
- How will you pull the data? Labour intensive?

Important:

Choose metrics that will gauge your success in delivering your stated Goals and Objectives.



What metrics would you want to monitor in your department?

Student Experience

Employee Growth and Learning

Innovation – Business development

Financial Success

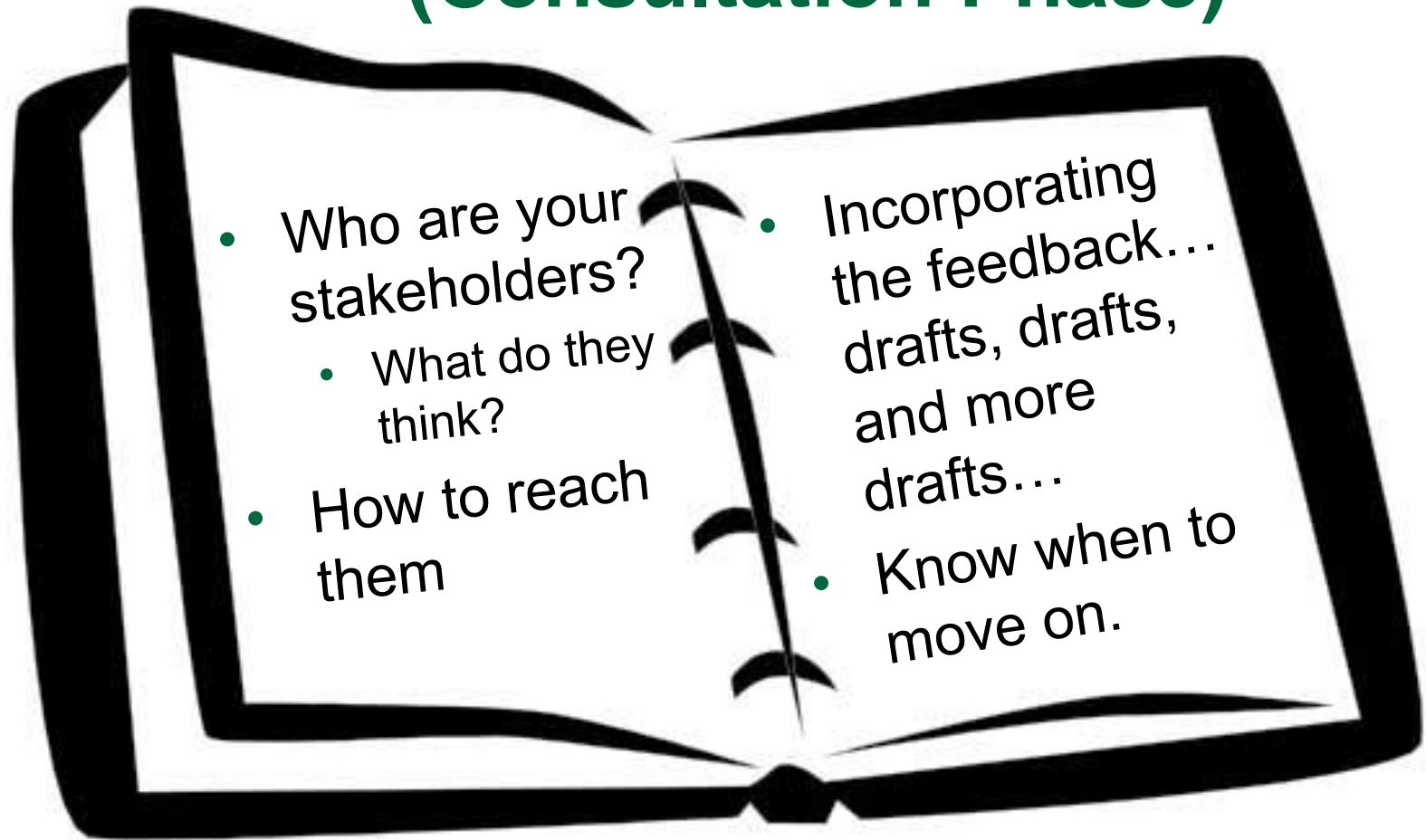


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Chapter 4 – Ask around..

(Consultation Phase)



Who are your stakeholders

- Make a list.

Here is ours:

- Our team
- Our customers (segmentation analysis)
 - Students
 - Online clients
 - Residents
 - College Staff
 - College Departments
 - External Clients
- Senior management
 - Deans, Directors
 - VPs and President
- College community



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How to Reach Them

Here is what we did:

- Our Team
 - 3 Town Halls
- Our Customers
(segmentation analysis)
 - Students
 - 3 Student Focus Groups
 - Built a case study project for 4 sections of School of Business Students
 - Surveys – in the halls and online
 - Meetings with Residence Management
 - College Staff & Departments
 - Town Hall
 - Video taped and posted online
 - Feedback tools online

- Senior management
 - Deans, Directors
 - Presentation at College Leadership Council
 - Round table exercise
 - Feedback survey
 - VPs and President
 - Individual meetings with each
- College Community and External Clients
 - Web-site
 - Current draft, video, feedback tool
 - External Environmental Scan
 - JC Williams



Drafts, drafts and more drafts...

How we set up our document:

- Director's Message
- Realizing Tomorrow Today – where we want to be
 - Mission and Vision
 - Balanced Scorecard
- Getting There – our strategic planning process
- Who are we?
 - By business unit
 - By balanced scorecard pillar



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Drafts, drafts and more drafts...

How we set up our document:

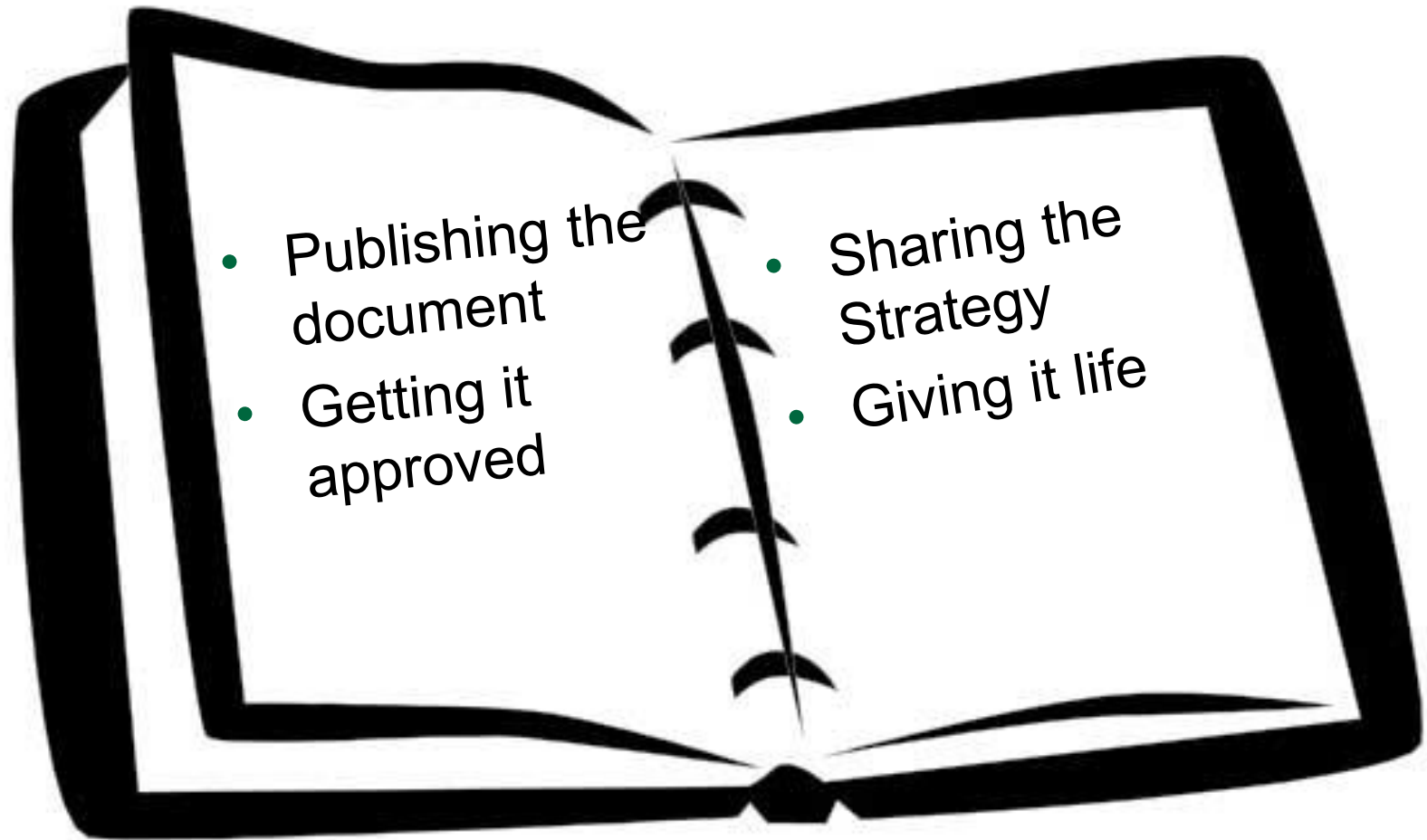
- Analysis and Exploration
 - How we conducted our research
 - What it taught us
- Recommendations
 - Goals
 - Objectives
 - Metrics
- Appendices
 - PESTEL
 - VRINE
 - Segmentation Analysis
 - SWOT



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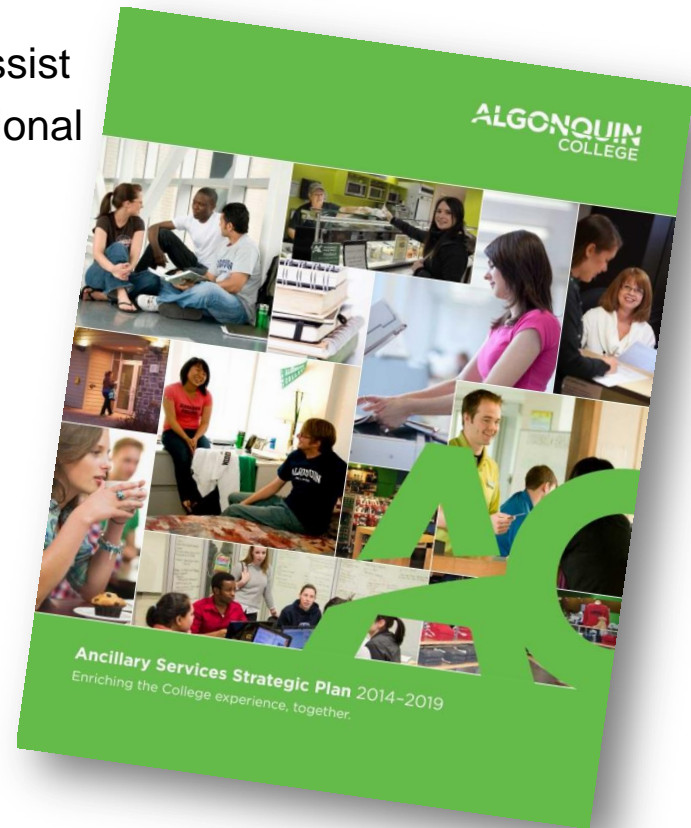
Chapter 5 – Telling our story



Publishing the document

Putting on the polish

- Make it reader friendly
 - We decided to ask **Echo Marcom Services** to assist
 - Adjusted the language to be more conversational
 - Inserted the graphic design component
 - Ensured a storybook type flow
- Make it motivational and inspiring
- Ensure longevity as much as possible
- Appendix supporting material



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Sharing the Strategy

Celebrate it everywhere

- Gather the staff
 - Physically give them the document
 - Celebrate the accomplishment
 - Have fun
- Make it visible
 - Vision statement on the wall in staff areas
 - Large format posters of the balanced scorecard
 - Add it to your web-site
 - Share it on social media
 - Create a video that shares the story
 - Here is a very well done [video](#)
 - Incorporate key pieces into your letterhead, presentation templates, etc.



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Giving it life

Incorporate it into your daily routine

- Monthly reports
 - Points documented under balanced scorecard pillars
- Business plans or project plans
 - Template referencing objectives that relate to your pillars
- Refer back to it as a resource
 - Example of web revitalization
- Monitor established metrics monthly
- Publicly follow up on your goals each year through an Annual Report
- Ensure that the areas within your department are linking their Performance Contracts (Annual Goals and Objectives) to the Strategy.
- Reward employees who demonstrate initiative in following the Strategy.

PROJECT TERMS OF REFERENCE (TOR) – Page 1	
Project: Create a Digital Screen Platform campus wide.	Owner: Brent Brownlee, Director CAS Delivery Manager: Alanna McDonell, Marketing Manager
Description: Coordinated effort with ITS to network the existing inventory of Woodroffe Digital Screens onto a common platform and identify a content management execution plan.	
Intent: <ul style="list-style-type: none">• Student Experience: Bring the student conversation from the bulletin boards to a vetted digital format that is easy to use and provides enhanced exposure.• Employee Growth and Learning: Select a platform that eases the communication workflow, saving resource time and effort.• Innovation: Deliver relevant content to the right place, at the right time, quickly, easily, and securely.	Strategic Plan Metrics: Student Experience: The number of input submissions Employee Growth and Learning: TBD – Training hours Innovation: Revenue from alternate market segments Screen analytics Financial Success: Sales index to budget

Ancillary's Four Pillars of Success

Employee name _____
Work Location _____ Date _____
Recognized by _____
Leader's Name & Signature _____

I recognize you for commitment to the Four Pillars of Success:

- Student Experience Employee Growth & Learning
 Innovation Financial Sustainability

Comments: _____



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TAKE A DEEP BREATH

And go for it!



Your turn...

COMMENTS, QUESTIONS?



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