

Texas Association of Community College Foundations 2015 Annual Conference

Using Compression Planning® in Resource Development

Texas Association of Community College Foundations
Austin, TX
Thursday, February 19, 2015

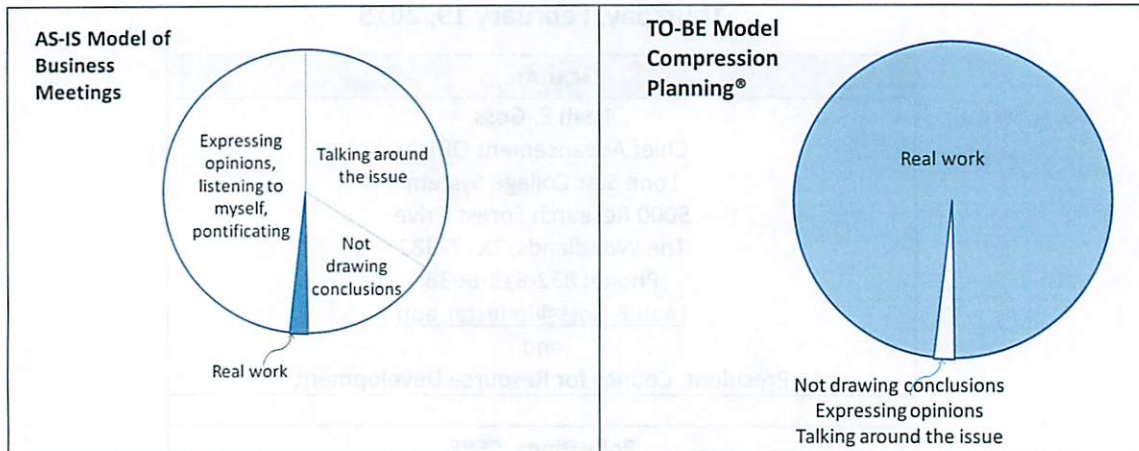
FACILITATORS
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AGENDA		
1:30 – 1:45	1. Overview of The Compression Planning® System	Whole group
1:45 – 2:05	2. Examples from the field	Two groups rotating (10 minutes each on two topics)
2:05 – 2:15	Break	
2:15 – 3:15	3. Compression Planning® session experiences: TWO practices	Two groups (1 group per topic)
3:15 – 3:20	4. Compression Planning® resources	Whole group
3:20 – 3:30	5. Debriefing	Whole group

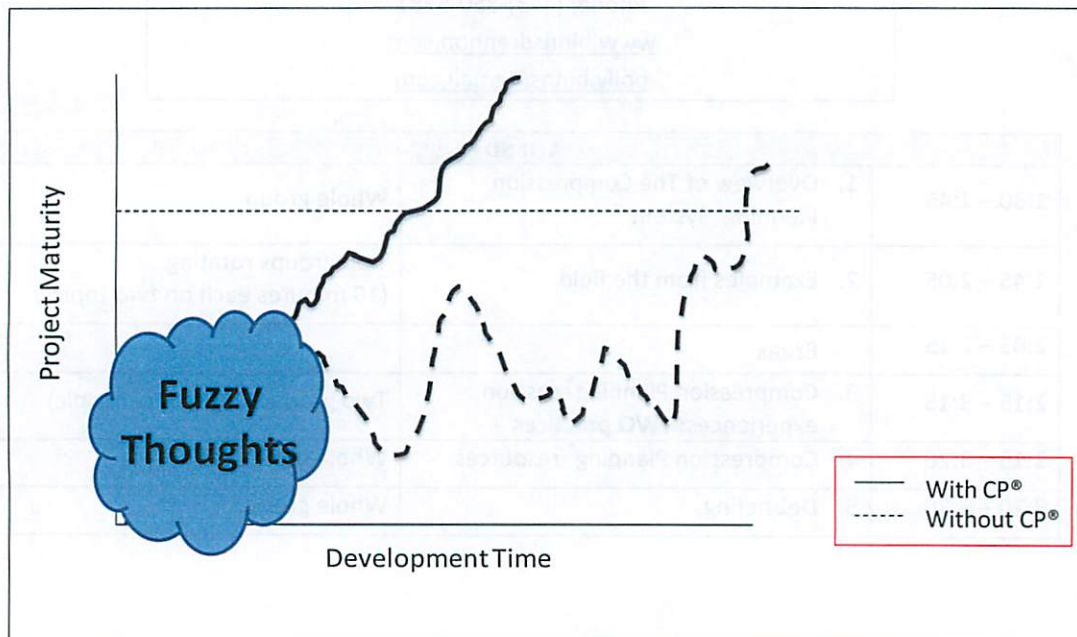
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1. Overview of The Compression Planning® System

1.1 People, people, people! We have to get our act together on this project!



1.2 Compression Planning® saves you time.



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1.3 Tools needed

<ul style="list-style-type: none">• Storyboards and easels (or bulletin board, whiteboard, or wall)• Cards (different sizes and colors) (or PostIt® notes)• Markers	<ul style="list-style-type: none">• Push Pins• Dots• Scissors• Transparent tape
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1.4 Every Compression Planning® session has a design phase and a facilitation phase

- (1) **Design Phase**—plan the session, including consultation with the client before the session. Plan on two hours of design work for each planning session.
- (2) **Facilitation Phase**—the actual planning session consists of:
 - (a) **Exploring**—generates, provokes, explores, entertains, fantasizes
Break—to indicate a change in thinking
 - (b) **Focusing**—judges, selects, sequences, applies logic, categorizes

To increase effectiveness, separate the creative *exploring* phase from the evaluative *focusing* phase. Mixing these components is confusing and leads to loss of productivity.

1.5 Participants and roles

See last page: “Roles within a Project Team”

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1.6 The Six Step Process

Step 1: Design (completed with client before the session)

Create standard storyboard design cards as shown below:

Topic

The Up-front issue/topic the group will address: 10 words or less; use "ing" word; less than 10 words

<p>Background</p> <p>Critical and factual information on the topic; necessary information for participants; 10-12 bits maximum</p>	<p>Overall Purpose</p> <p>Ultimate reason for addressing this issue; focuses group on the ultimate end product; creates energy and purpose; use "to" followed with a verb</p>	<p>Purpose of This Session</p> <p>Defines the results and deliverables of a specific session; focuses energy and manages times; use "to" followed with a verb</p>	<p>Non-Purpose of This Session</p> <p>To tell what is not included in this session; sets boundaries; focuses energy; manages time</p>	<p>Headers (exploring and focusing)</p> <p>Key component to be addressed during the session; pathways to accomplishing our purpose; headers create categories to make the issue manageable; create energy and focus; solicit participation;</p>
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STORYBOARD CARD	STANDARD INTERVIEW QUESTIONS WITH CLIENT
Topic	What problem, opportunity, or predicament do you face?
Overall Purpose	What is the larger picture of the project?
Purpose of this Session	At the end of the session, what do we <i>specifically</i> want to have?
Non-purpose of this Session	What is off limits? What could derail this session?
Background	What are the top 10 facts needed to set the stage for the session?
Header Cards	What questions do you want explored? What 3 – 5 key questions will crack open your issue?

- **Determine who to invite**—key stakeholders
- **Determine how many people**—5 – 12 is optimum; larger groups need to subdivide
- **Determine how many sessions**—depends on complexity and maturity level of the project idea. For example:
 - Capital Campaign—two or three 90-minute sessions
 - Planning a reoccurring fundraising event—one 90 minute session; a new fundraising event—two or three 90 minute sessions

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Step 2: Exploring Session

To yield many rich ideas, the facilitator engages the entire planning team in pure form thinking about the header card topics.

- **Rules of Engagement for the Exploring Session**

Suspend judgment

Listen to each other

Create rich thoughts

No speeches
(30 second rule)

- **Exploring techniques**—Capture verbs, write at least 10 words per card, look for unique factors, can the idea be prototyped?

Break—Helps participants switch sides of your brain (coffee break, hours, days, weeks)

Step 3: Focusing Session

The entire planning team narrow down the many ideas generated during the exploring session to a manageable few

- **Rules of Engagement for the Focusing Session**

Attack ideas,
not people

Narrow down to a
manageable few

Focus on
unique factors

Merge ideas and
create strength

- **Focusing techniques**—dot ideas, group like ideas, rank order ideas, sequence ideas, select top ideas, separate easy to accomplish from difficult to accomplish, categorize high cost and low cost.

Step 4: Action Plan

Develop a plan of action to implement outcomes.

Tasks

Expected Results

Who Will Do It?/
Deadline

Step 5: Communication Plan

Develop a plan to communicate outcomes to key stakeholders.

Write specific messages on numbered cards:

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Detailed message #1
 Detailed message #2
 Detailed message #3, etc.

Who Needs to Know	What They Need to Know	Who Will Tell them	How Will We Tell Them	Deadline
Budget Office	2,5,9	Project Director	email	Dec. 8, 2012
etc.				
etc.				

Step 6: Debriefing

Determine how the session went using these standard cards.

What went well?

What would we change for the next session?

Lessons learned

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2.1 Example 1

Designing a Cultivation Plan to Raise the Private Match for NWLTC's Workforce Development Center (WDC)

Background	Overall Purpose	Purposes of Session	Header Cards
State has created a formula-based matching fund program for workforce development projects	To better meet the workforce needs of the region served by NWLTC through the Workforce Development Center (WDC)	To develop cultivation plan for the project	What cultivation strategies can we use?
This is one of several CP sessions conducted to plan the campaign to raise the match.			How do we keep our audiences informed?
A case for support has already been developed for WDC at Northwest Louisiana Technical College		Non-Purposes of Session To debate the choice of WDC for the project To debate amount to be raised for match	
A prospect list has already been developed for the campaign — Includes foundations, corporations and business, individuals			

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2.2 Example 2

Reinventing the Vintage Affair

Background	Overall Purpose	Purposes of Session	HEADER CARDS
The 2011 Vintage Affair was a success by many measures	To infuse fun, friend-raising, and fund-raising into the 2012 beer and wine tasting event	1. To brainstorm ways to appropriately add levity	Ways to add levity to a wine and beer tasting
The event this year netted \$1,500.00		2. To brainstorm ways to showcase Sinclair	Ways to wow participants about Sinclair
Next year's event will be October 5, 2012		3. To brainstorm ways to attract more donor participants	Ways to make donors change their vacation plans in order to attend
We want to continue both the beer and wine tasting		4. To brainstorm ways to engage donors during the event	Ways to meet and greet donors during the event
Sinclair's President wants to make the event a fun showcase for Sinclair		5. To brainstorm ways to turn the event into a fund-raiser	Ways to turn the event into a cash machine
Sinclair's VP for Advancement wants to attract and engage donors		Non-Purposes of Session	
We also want to explore ways to raise funds with the event		1. To hold back on ideas	
The ideas we generate today will fuel future planning		2. To dwell on past events	
		3. To make long comments or speeches	
		4. To think about budgetary constraints	

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3. Compression Planning® with Storyboarding Experiences

Designing a Case for Support for the Campaign to Raise \$5,000,000 to Build a "One Stop" Student Services Center

Background	Overall Purpose	Purposes of Session	Header Cards
<p>Growth of the college-enrollment weeks are nearly impossible to manage</p>	<p>To ensure student success by developing a compelling case for support of the One Stop Center</p>	<p>1. To define the project</p>	<p>What are the problems we are trying to solve?</p>
<p>Numerous students leave in frustration due to long lines to enroll in classes and financial aid</p>		<p>2. To identify 5-7 compelling reasons to support project</p>	<p>What is the project?</p>
<p>Research demonstrates that student performance and engagement increases and improves when advising, counseling, tutoring and academic support are located in "one stop" centers on the campus</p>		<p>Non-Purposes of Session</p>	<p>Who will benefit?</p>
<p>Student life (clubs and associations) do not have a central location for offices and activities and are dispersed around the campus</p>		<p>1. To plan what the building will look like</p>	<p>Why is the college well positioned to solve these problems?</p>
		<p>2. To decide where the building will be located on the campus</p>	
		<p>3. To determine what programs and services will be located in the building</p>	


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Developing Employee Giving Campaign to Support One Stop Center Campaign

Background	Overall Purpose	Purposes of Session	Header Cards
Growth of the college-enrollment weeks are nearly impossible to manage	To reach 100% full-time employee giving to the One Stop Center Campaign	1. To develop a case for support for employee giving	Reasons why faculty, staff and administration will want to give to this campaign
Numerous students leave in frustration due to long lines to enroll in classes and financial aid		2. To organize employee giving campaign and identify leadership	
Research demonstrates that student performance and engagement increases and improves when advising, counseling, tutoring and academic support are located in "one stop" centers on the campus		3. To identify top 3-5 ways to thank employees	Out of this world ways to approach faculty, staff and administration to give so we can reach 100% giving for full-time employees
Student life (clubs and associations) do not have a central location for offices and activities and are dispersed around the campus		Non-Purposes of Session	
	1. To design campaign materials or create taglines	Fun and meaningful ways to thank and celebrate faculty, staff and administration for giving	
	2. To make final decisions on who to ask or for how much		
	3. To talk about past employee campaign failures		
	4. To talk "politics"		

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4. Compression Planning® with Storyboarding Resources

<p>Training Available From: McNellis & Associates 715 15th Avenue Beaver Falls, PA 15010 724-847-2120 http://www.mcnellis.com/</p>	<ul style="list-style-type: none"> • Compression Planning® Institutes: <ul style="list-style-type: none"> ○ Check McNellis website for dates ○ Locations: <ul style="list-style-type: none"> ○ Oglebay Resort/Conference Center, WV ○ Sinclair Community College, OH ○ Dallas County Community College District, TX ○ Normandale Community College, MN ○ MORE
<p>Books Available From: www.Amazon.com</p>	<ul style="list-style-type: none"> • Jerry McNellis. <i>The Compression Planning® Advantage: Exploding the Meeting Myth</i> (\$29.95) • Patrick McNellis. <i>The Compression Planning® Advantage: A Blueprint for Resolving Complex Issues</i> (\$99.00)
<p>Downloads Available From: www.mcnellis.com. Click on the Resources tab.</p>	<ul style="list-style-type: none"> • Templates for <ul style="list-style-type: none"> ○ printing cards ○ reports ○ using Compression Planning® ○ Common Headers for proposal development
<p>Experience in Compression Planning® www.mcnellis.com</p> 	<ul style="list-style-type: none"> • Free access to the McNellis Company's on-line <i>Experience in Compression Planning®</i> materials that will reinforce content and skills developed in the session that can be immediately applied to your work life. 12 Lessons with video and handouts. • Scan QR Code to left or • Go to bottom of home page and click link to access.
<p>Blog http://www.mcnellis.com/blog/</p>	<ul style="list-style-type: none"> • More tips, great stories, and useful resources
<p>Supplies Available From: Storyboard Tools Attn: Kim McDemus 08 East Pike Street—Rear Houston, PA 15342 Phone: 724-229-0954 Email: kim@storyboardtools.com www.storyboardtools.com</p>	<ul style="list-style-type: none"> • Storyboards • Easels • Carrying cases • Starter supply kits • Cards (different sizes and colors) • Push Pins • Storyboard rentals

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McNellis

Compression Planning® Institutes

February 11-13, 2015 Oglebay Resort & Conference Center, WV

February 25-27, 2015 Dallas County Community College District

April 22-24, 2015 Sacramento, California

May 19 - 21, 2015 Normandale Community College, MN

July 22-24, 2015 Oglebay Resort & Conference Center, WV

September 23-25, 2015 Dallas County Community College District

October 7-9, 2015 Normandale Community College, MN

October 21 -23, 2015 Oglebay Resort & Conference Center, WV

December 9-11, 2015 Oglebay Resort & Conference Center, WV

**MORE INSTITUTES BEING ADDED ALL THE TIME.
BE SURE TO CHECK THE WEBSITE REGULARLY.**

<http://www.mcnellis.com/training-institutes/>

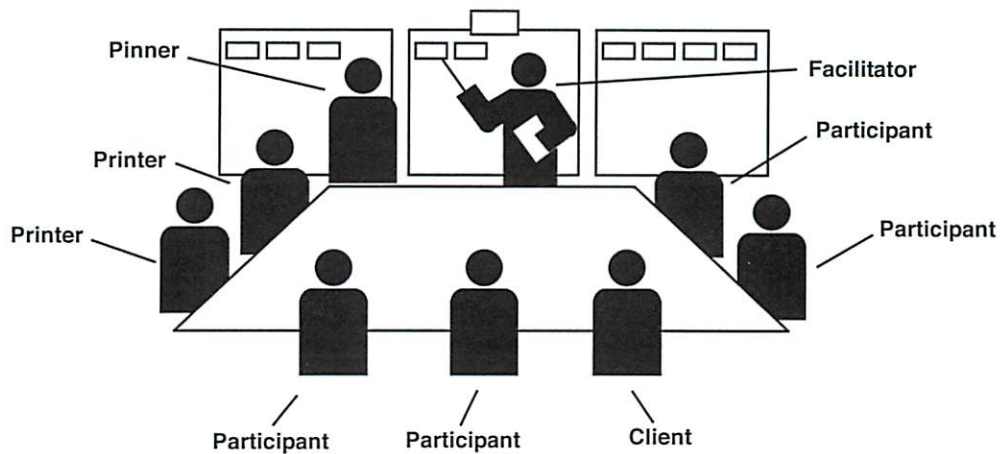
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- Free access to the McNellis Company's on-line *Experience in Compression Planning®* You will receive daily emails for one month chock full of tips, free resources and 12 Lessons with video and handouts.
- Scan QR Code to left
or
- Go to bottom of home page (www.mcnellis.com) and click link to access.

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Roles within a Project Team



Pinner / participant

1. Dumps the push pins out on the table
2. Pins subber cards in the center of the card
3. Avoids overlapping and gapping cards
4. Stands to the side when waiting to pin so the participants can see the boards
5. Contributes ideas during a session
6. Does not act as a second facilitator



Printer / participant

1. Uses a verb as first word on a card
2. Captures a single, complete thought per card
3. Prints, DOES NOT WRITE
4. Listens and waits for the spin
5. Contributes ideas during the session
6. Asks for help when uncertain about what to print

Client / participant

1. Owns the project
2. Sits where there is low eye contact with participants
3. Focuses their entire energy and thinking upon the issue at hand
4. Contributes, but does not dominate

Participants

1. Avoid playing off the client
2. Focus their entire energy and thinking upon issue at hand
3. Listen and build on others' ideas
4. Direct energy to content not process

Facilitator

1. Conducts the session
2. Gives direction to PINNER and PRINTERS
3. Gives permission to take risks
4. Protects people and their ideas
5. Brings out the best thinking of the group
6. Manages the group's energy and the process
7. Coaches convergence and closure