What is Strategic Planning?
Strategic Planning is NOT:

- The old LONG TERM PLANNING which was often so buried in every minute piece of data that the process often stalled or collapsed before much was accomplished.
Strategic Planning is NOT:

- Operational planning which is highly specific and guides the daily operations of the institution. Operational planning occurs in the implementation of strategic initiatives.
Strategic Planning Is:

- The responsibility of the President, but is a highly collaborative process.
- Direction centered leading to institutional strategic directions and initiatives.
- Focused on core values, mission, vision and strategic directions statements.
- Guided by the most powerful internal and external driving forces.
Strategic Planning Is:

- Conducted to identify institutional distinctiveness and take advantage of comparative advantages.
- The process of developing and maintaining a strategic best fit with the institution’s environment.
- An ongoing process which can be frequently adjusted.
- The process of developing a small number of goals and refreshing or replacing those goals every 3-5 years as needed.
Strategic Planning **Must**: 

- Connect the institution with its environment.
- Be inclusive and very participatory.
- Be respectful of existing governance systems.
- Have the active and strong support of campus leaders.
Strategic Planning **Must:**

- Be linked to decision making.
- Lead to demonstrated results, which means this process leads to hard work.
- Generate enhanced institutional effectiveness and distinctiveness.
Terminology

• Mission Statement

* It describes the institution’s purpose, scope and capabilities.

* It describes what you do.
Terminology

• Vision Statement
  * It defines the institution’s desires and aspirations for the future.
  * It is what you want the institution to be.
Terminology

• Core Values

* They are fundamental principles that guide the institution in accomplishing its mission.

* They define the common values of the institution which provide the foundation for all activities.
Terminology

• Planning Assumptions
  * Statements of projected institutional conditions important as a base to planning
Terminology

• Planning Assumptions
  * Enrollment and Demographics
    - Enrollment will ____
    - Demand for on-campus housing will ____
    - African American student enrollment will ____
  * Resources and Facilities
    - State funding will _____
    - Deferred maintenance will _____
    - Fundraising will _____

Continued
Terminology

• Planning Assumptions (cont.)

* Curriculum and Instruction
  - The academic student profile will _____
  - Demand for teachers in New York will __
  - The program in _____ will _____

* Administration and Institution
  - Demand for technology will _____
  - The college’s role in supporting the regional economy will increase.
  - Pressure for accreditations will increase.
• Environmental Scanning
  * The process of examining the internal and external environments to determine and analyze the factors that will significantly impact upon the institutions future.
Terminology

• Driving Forces
  * Those select factors or trends determined from the environmental scan which will impact most significantly upon the institution.
  * The factors can be demographic, social, economic, political, technological and educational.
Terminology

- Distinctiveness
  * Special institutional attributes that are not common to other institutional competitors and that can be readily identified as distinguishing strengths.
Terminology

• **Comparative Advantages**
  
  * Those very special attributes or strengths (almost unique) that are so significant they enable the institution to rise above its peers or competition.
Terminology

• Strategic Direction/Goal
  * A statement of intended institutional direction given the vision, mission, and core values statements.
Terminology

- **Strategic Initiative**
  * An action step, or set of action steps, intended to support a strategic direction.
  * The institutions that are most successful with strategic planning assign personal responsibilities and timelines to each strategic initiative.
The Strategic Planning Structure

- Strategic Planning And Resource Council.
  - Planning Assumptions
  - Driving Forces
- Governing Ideas Task Force.
- Institutional Distinctiveness Task Force.
- Optional Task Forces, if needed. The facilitator wonders if SUNY College at Oneonta needs a task force to examine its organizational structure.

Continued
The Strategic Planning
Structure
Continued

• Stakeholders’ Planning Conferences, Forums and Focus Groups.

• Governing Groups.

• Coordinator is appointed to manage the process (Nancy Wolters).

• A Secretary is appointed to SPARC (Glenn Mayer) to take notes and manage communication.
The Strategic Planning and Resource Council

**Purpose**

- Advises the President on development, coordination, integration and evaluation of the planning process.
- Advises the President on any other planning issues.
- Studies and interprets relevant data.
- Advises and assists the President with development and implementation of the strategic plan.
- Involves the total institutional community as fully as possible in the process.
The Strategic Planning Council and Resource Council

Composition

• Membership is broad and members are expected to include as many of their colleagues in the process as possible.

• Dr. Larry Guzy is the chair.
The Strategic Planning and Resource Council

Authority

- Advisory to the President.
- Respects and supports the governance systems. Is neither a competitor nor a substitute for existing governance systems.
The Strategic Planning and Resource Council

- Prepares statements defining the planning assumptions.
- Validates these statements with the institutional community and prepares a final statement.
The Strategic Planning and Resource Council

• Conducts internal and external scans to determine the driving forces of strategic significance.

• Prepares a report on the implications of these driving forces on the strategic future of the institution.

• Validates these statements with the institutional community and prepares a final statement.
Governing Ideas Task Force

- Assesses and/or develops new statements of core values, mission, vision and strategic directions.
- Involves the institutional community in this analysis.
- Prepares a paper, and validates with the institutional community, recommendations regarding the statement of governing ideas.
Note: Most institutions have a well developed mission statement but often need work on the vision statement. Many have not identified their core values and often strategic directions have not been identified.
Governing Ideas Task Force

The Vision Statement Should Be:

- Motivational
- Inspiring
- Imaginable
- Desirable
- Focused
- Feasible
- Flexible
- Understandable
Institutional Distinctiveness Task Force

- Recommends concepts, criteria and process for developing increased institutional distinctiveness.
- Involves the institutional community in this discussion and validates the task force concepts.
- Advises on opportunities for developing increased institutional distinctiveness.
Thoughts About Institutional Distinctiveness

- Important attributes that are currently, or readily achievable, distinguishing strengths.

- Horizontal attributes (i.e., institution-wide such as location or a regionally distinguished general education program).

- Vertical attributes (i.e., a specific program or service such as the identified best telecommunications program in the southeast United States).
Partial List of Potential Areas of Distinctiveness

- Mission
- Clientele
- Geographic Location
- Academic Programs (Horizontal & Vertical)
- Pedagogy
- Out of Class Programs and Services
- Residential Life
- Endowed Scholarship Program
- The Arts
- Athletics
- Public Service
- Campus Culture or Climate
Optional Task Forces

• Other task forces can be created if an institution believes a task force on a specific topic would be helpful to the planning effort.

• The facilitator wonders if SUNY Oneonta needs a task force on Institutional organization. My scan of the institution leads me to believe that this could be very useful.
Making the Process Collaborative

• The process should be as inclusive as possible by involving all members of the campus community and as many key people in the extended community as possible.
Stakeholders’ Conferences, Forums and Focus Groups

- Stakeholders’ conferences conducted to include large groups of internal and external stakeholders to discuss driving forces, governing ideas and strategic initiatives.

- Forums and focus groups held by the various task forces to gain new information and test task force ideas.
The Strategic Plan

• Description of the Process
• The Planning Context
  * Environmental Driving Forces
  * Institutional Driving Forces
  * Planning Assumptions
• The Governing Ideas
  * Core Values Statement
  * Mission Statement
  * Vision Statement
  * Strategic Directions Statements
• Institutional Distinctiveness
• Strategic Directions and Initiatives
• Operational Planning Initiatives - Possibly
Responsibility for Strategic Initiatives

Often the President will work during the summer months with the Strategic Planning and Resource Council and the administrative team to establish assignments and timelines to accomplish the strategic initiatives. These assignments are broadly published with the plan.
CELEBRATE
WORK TO ACCOMPLISH THE INITIATIVES