SUNY College at Oneonta Strategic Planning

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Establishing the Support Structure for Planning

Penson Associates
The planning chair, Dr. Larry Guzy, and the facilitator have worked with the President and many others to build a suggested process.
Presenting that Process to You
Today’s Agenda

- What I Have Discovered in My Preliminary Review

- The Strategic Planning Structure

- Identifying the Strategic Planning and Resource Council and Its Task Forces

(Continued)
Agenda (continued)

- The Work of the Strategic Planning and Resource Council (Planning Assumptions and Driving Forces - Overview of Process)
- The Work of the Task Forces
- Building a Strategic Plan and a Process for Successful Accomplishment
A first look at:

- **Strengths**
- **Weaknesses**
- **Opportunities**
- **Threats/Challenges**
- **Driving Forces**
- **Core Values**
- **Institutional Distinctiveness**
Appoint a Strategic Planning Coordinator

Nancy Wolters
Establish Strategic Planning and Resource Council (SPARC)

- Several General Faculty Members (Senate Pres., etc.)
- Dr. Larry Guzy is Chair of the SPARC
- Students
- President Kleniewski
- A Dean
- A Division Head
- A Functioning Secretary-Glenn Mayer and PR Person (non-voting)
- A Director
- Member of the Secretarial or Clerical Staff
- Member of the Custodial or Maintenance Staff
- Executive Staff
- Appropriate Union Reps., if They so Choose
- Process Coordinator Nancy Wolters
- Others?
Work of the SPARC Begins

• Review the Most Recent Strategic Plans and Accomplishments
• Form Task Forces (Institutional Distinctiveness and Governing Ideas)
• Create a Communication Plan
  (*The most serious mistake in communications is to assume it happened.*)
• Prepare the Planning Assumptions
• Determine the Driving Forces
• Prepare for a Stakeholders’ Conference
Governing Ideas
Task Force

- Core Values Statement
- Mission Statement
- Vision Statement
- Strategic Directions Statements
Institutional Distinctiveness Task Force

- Establish the Criteria and Procedures for Identifying, Assessing, and Developing the Institution’s Distinctiveness Identity
- Identify Opportunities for Distinctiveness
- Conduct Open Forums
- Prepare Report and Recommendations
Optional Task Forces

• They are totally institutional specific and need not even exist.

• Sometimes it may be appropriate to form a task force based upon a special strength or issue at the institution.

• It seems to the facilitator that a task force on institutional organization would be a good idea.
A writing committee will be formed and chaired by Dr. Guzy or his designee.

The writing committee will be responsible for creating drafts of Conference results.

The writing committee will be responsible for the process of “sense making.”
Estimated Timelines

- By the end of September the planning assumptions statements should be firm.
- By late October the driving forces, core values and institutional distinctiveness concepts should be in a near final form to be examined by a stakeholders conference.
- By late October the vision statement should be ready for testing with more work intended.
- By November 1, the mission statement should be well tested.
Stakeholders’ Conference

• A stakeholders’ conference will occur in early November.
• The conference will come close to finalizing the driving forces, core values and institutional distinctiveness.
• The conference will address the mission and vision statements.
• The conference may address initial thinking about strategic goals.
Estimated Timelines

• By the end of the semester the mission statement, vision statement and a statement of institutional distinctiveness should be in near final form.

• By the end of January, the Governing Ideas task force should have begun to have a good idea about the general strategic goals that they will present for consideration.
Estimated Timelines

• In late January or early February a stakeholders’ conference will be held to initiate the process to finalize the mission, vision, strategic distinctiveness and strategic goals statements.

• This Conference will again include a large group of people, if they so choose.
Estimated Timelines

• In March or early April a final stakeholders’ conference will be held to give near final input on the strategic goals and any unfinished planning statement.

• This conference will also be directed at identifying a preliminary list of initiatives within the various goals in addition to preliminary priorities among the initiatives.
Estimated Timelines

• The President’s Executive Staff will then begin the process of finalizing priorities, building steps within high priority initiatives and considering resource allocations.

• These plans will be tested and discussed with the Strategic Planning and Resource Council.

• The plan will be widely distributed.

• The Strategic Planning and Resource Council will continue as an advisory body to the President as needed.
Achieve the Goals