The higher education landscape is changing dramatically. And strategic planning for colleges has never been more critical. However, planning on campus is uniquely challenging. Why?

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**Integrated Planning on Campus**
Integrated Strategic Planning for Higher Ed
We’re going to...

- be familiar with the **elements and process** of strategic planning
- know what **integrated planning** is and understand its value
- identify **existing barriers** to long-range planning on campus
- understand the role of **finance and budget** in the college planning process
- brainstorm ideas for **how we can best contribute** to our institution’s future
A good strategic plan is **all about the process**. And that process must be **comprehensive, ongoing and inclusive** of all stakeholders – both **internal and external**.

“Good planning should inspire us and set a common direction for our campus community.”

Our planning must **align with the mission**, it must **integrated and coordinate** existing plans, and it must be **embedded in the culture** of our institution. Finally, our plan must be **highly visible** and milestones must be celebrated.
Is our planning broken?

• Integrate both horizontally and vertically
• Planning must be focused and coordinated
• The data, talent and knowledge already exist

“From the board’s vision statement to the annual work-plan of your grounds crew, good planning is happening on campus right now.”
So, what is *integrated* planning?

If your institution is like most...

- You’ve got **lots of plans** doing exactly what they’re designed to do.
- These plans are **built to achieve targeted outcomes for units** at every level of the organization.

... your planning needs to be integrated.

- But **without a common direction**, they can be working against each other, creating waste, competing for resources and failing to realize their potential for advancing the institution.
The process…

comprehensive, but not complicated.

- It starts by understanding the \textit{history, status and future} of your institution.
- Next comes the \textit{listening... lots of listening.}
- Then \textit{processing, analysis and development}. All of which should be highly visible and celebrated.
- Finally, an ongoing process must be \textit{adopted and embedded} to ensure the continuity of the institution's plans and the continuous refreshing of its strategic direction.

“The real work must be done by the stakeholders on the ground.”

Any strategic plan written by an outsider will be disconnected from the cultural and operational realities of your institution. And you will have missed a rare opportunity to \textit{engage your campus in a powerful, strategic dialogue.}
Why does higher ed struggle with long-range planning?

- Who’s job is it?
- The annual ‘hamster wheel’
- Silos
- Narrow scope and short event horizons
- What is getting measured and why? *Yeah, what’s the “why”?*
So, where do WE fit into all this?

- Planning levels
  - Operational / Organizational / Cultural
- Continuum of engagement
  - Process and timeline
- Narrow v Broad scope
  - “a mile wide…”
- Finance v Accounting
How will we contribute?

• Participate and integrate at each level…
  • Cultural / mission / visionary
  • Organizational / governance / strategic
  • Practical / unit / tactical

• Financial Strategies
  • Examining revenues and expenses
  • Partnering opportunities
  • “Robin Hood”
  • Local streams
  • Other “blue oceans”
  • What else?
Tools for Planning

• Our budget
• SWOT/STEED
• Waterfall
• Dashboards
  • Key performance indicators
• Trend, ratio and “what if” analysis
• What else can we provide to inform this process?
Discussion

- Questions
- Comments
- Resources
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▪ SCUP Planning Institute
  ▪ www.scup.org/page/eventsandeducation/pi
▪ Integrated Planning Video
  ▪ www.youtube.com/watch?v=wf-jetulcCQ&t=2s