The University of Central Arkansas

Strategic Planning

Dr. David McFarland
Penson Associates Inc.

©2009 Penson Associates, Inc
Establishing the Support Structure for Planning
The strategic planning chair, Dr. Michael Schaefer, 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 Process Coordinator

Dr. Carl Frederickson
Establish Strategic Planning and Resource Council (SPARC)

- Several General Faculty Members (Senate Pres., etc.)
- Chair of the SPARC; Dr. Michael Schaefer
- Students
- President Meadors
- Vice Presidents
- A Dean
- A Division Head
- Strategic Planning Process Coordinator; Dr. Carl Frederickson (non-voting)

- A Director
- Member of the Secretarial or Clerical Staff
- Member of the Custodial or Maintenance Staff
- A Functioning Secretary; Ms; Carol Daves (non-voting)
- A person to build a communication plan; Mr. Jeff Pitchford
- External Members
- Others or different members?
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.
Writing Committee

- A writing committee will be formed and chaired by the SPARC chair or his/her 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 late February the planning assumptions statements should be firm.
- By late March the driving forces, core values and institutional distinctiveness concepts should be in a near final form to be examined by a stakeholders conference.
- By the end of this semester, the mission statement should be well tested.
- By the end of this semester, the vision statement should be ready for testing with more work intended.
A stakeholders’ conference will most likely occur on April 7, 2010.
The conference will come close to finalizing the driving forces, core values and institutional distinctiveness.
The conference will address the mission and vision statements.
Estimated Timelines

By late September, the mission statement, vision statement and a statement of institutional distinctiveness should be in near final form.

By late September, the Governing Ideas task force should have the first draft of the general strategic goals ready for consideration.
Estimated Timelines

- In late September or early October a stakeholders’ conference will be held to initiate the process to finalize the mission and vision.
- At this conference, agreement will begin to form on the strategic directions/goals.
- Any other strategic statement not yet finalized will be completed at this conference.
Estimated Timelines

In late November or early December a final stakeholders’ conference will be held to give near final input on the strategic goals.

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

Prior to this conference many vehicles will be used to solicit input on potential strategic initiatives for each goal.
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 and the President’s Executive staff at a 1-2 day retreat.

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