Strategic Planning

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Nariman Farvardin
“Make No Small Plans”

Make no small plans. They have no magic to stir humanity’s blood and probably themselves will not be realized.

Make big plans; aim high in hope and work, remembering that a noble, logical plan once recorded will never die, but long after we are gone will be a living thing, asserting itself with ever-growing insistency.

Remember that our sons and daughters are going to do things that will stagger us.

Let your watchword be order and your beacon, beauty. Think big!

– Daniel Burnham; US Architect, 19th Century
A Good Strategic Planning Exercise

- Creates **direction** and **specificity**
- Creates **camaraderie**
- Creates **energy** and **urgency**
- Creates implicit **commitment/ownership** for all who participate in developing it
- Creates obligation to **continually self-assess** and **monitor progress**
- Creates opportunity to **report progress**, and generate **pride and excitement**
- Minimizes **unnecessary and silly battles over resources**
External Forces

- Increase in demand for higher education
- Fluctuation in funding
- Fluctuations in the political climate
- Change in student demographics
- Gap between public needs and what the university provides
- Need to compete
- Globalization
Generalities

• **Overarching Goal**: Building a world-class university with affordable access

• 10-year plan (September 2008 – August 2018) with specific 5-year (2013) and 10-year (2018) milestones and annual progress reports

• At the conclusion of this period, we will be a top 10 public university
From President Mote

• Develop a bold plan with the explicit understanding that we will deliver the agenda ourselves
• The plan should stretch, prod, and challenge us to take on new initiatives with high impact
• Address six issues
  – National competitiveness of faculty
  – Teaching, its success and efficiency
  – Sustainability and the environment
  – Student success, access, diversity, and inclusiveness
  – Financing and focusing resources
  – Resource expenditures should be combed for high value impact
From President Mote

• From the VPs/Deans Retreats
  – Develop top-class graduate program experience
  – Transform locale into a value-added magnet
  – Develop strong international programs, going beyond study abroad
  – Develop a new CORE program based on knowledge, capabilities, and preparation that will describe every UM graduate in 2015
Key Themes

• Commitment to excellence
  – Create an environment that values, supports, nurtures, and rewards excellence; places more emphasis on quality and impact of scholarship; and exhibits zero tolerance for mediocrity
  – Elevate level of intellectual discourse in the university
  – Elevate standards and expectations across the board
  – Enhance academic reputation of institution in the world

• Accelerate Progress
  – Create an agile and lean structure which is administratively streamlined, highly responsive, uses IT intelligently to increase efficiency, and is focused on customer satisfaction

• Resource allocation
  – Develop a dynamic system for resource allocation
  – Align university priorities with resources (financial, human, and space/facilities)
  – Incentivize excellence
Participants

- Steering Committee (SC)
- Major Initiatives Committees (MICs)
- Multiple constituencies to get input from:
  - Regents and Trustees
  - University Senate
  - VPs, deans, chairs, and directors
  - Faculty, staff, students
  - Alumni, donors, elected officials, corporate and business leaders, parents
Timeline

- September: Form and announce SC
- October: SC will start work
- November: Identify major initiatives. MICs will start work
- January: MICs will submit their reports to SC
- February: 1st draft of Strategic Plan will be shared with all stakeholders for input
- March: Plan will be modified and 2nd draft will be shared with stakeholders for input
- April: Strategic Plan will be submitted to University Senate for approval
Steering Committee Tasks

• Develop a bold vision for the University
• Develop concrete strategies to implement the vision
• Develop specific measures of success, specific targets, and a time line for achieving them
• Engage all stakeholder in the development process
Steering Committee Agenda

• Review current situation (Meeting #2)
  – Current strategic plan and progress made relative to its initiatives
  – Middle States Report and its key recommendations
  – Review recommendations from Deans/VPs retreats

• Environmental analysis (Meeting #2 and Meeting #3)
  – Performance and productivity analysis
  – Benchmark against peers
  – Gap analysis
  – Analyze strengths, weaknesses, opportunities, and threats

• Seek input from different constituencies (via SP Website)
Steering Committee Agenda

• Develop vision statement with input from President; identify broad strategic issues, objectives, and initiatives; develop charges for MICs (Meeting #4)
• MICs will start work
• Review input received from stakeholders; refine vision and develop a structure for the Strategic Plan (Meeting #5)
• Seek additional input from stakeholders on proposed initiatives
• Develop specific objectives; set targets; spell out action steps (Meetings #6 and #7)
Steering Committee Agenda

- Review and discuss inputs received from MICs (Meetings #8 and #9)
- Generate 1st draft of Strategic Plan
- Review and revise 1st draft (Meeting #10)
- Share 1st draft with stakeholders and seek input (via Website and possibly 1-2 town hall meetings)
- Review and revise 1st draft based on input from stakeholders (Meeting #11)
Steering Committee Agenda

- Generate 2nd draft of Strategic Plan
- Review and revise 2nd draft (Meeting #12)
- Share 2nd draft with stakeholders and seek additional input (via Website)
- Review and revise 2nd draft based on input from stakeholders (Meeting #13)
- Generate 3rd draft of Strategic Plan
- Finalize the document and submit to the University Senate for approval (Meeting #14)
Mission/Vision

Environmental Analysis

SWOT Analysis

Benchmarking

Gap Analysis

Strategic Issues

Specific

Mission/Vision

Gap Analysis

Strategic Objectives

Measurable

Assessment

Agreed upon

Action Steps

Realistic

Communication

Time/Cost Bound

Specific

Measurable

Agreed upon

Realistic

Time/Cost Bound
Thank You

• Thank you for your willingness to participate in this endeavor.
• Fasten your seat belts and prepare for a great ride.