STRATEGIC PLANNING PROCESS

September, 2019
Goal

Facilitate process that builds from areas of **strength, promise & opportunity** to create a Strategic Plan that will guide the future of UMW for the next 7 years.
CHARACTERISTICS OF SUCCESSFUL PLANNING AND IMPLEMENTATION

• VISION AND MISSION DRIVEN
• POSITIVE AND OPTIMISTIC
• BUILDS ON PAST
• DEVELOPED BY CAMPUS
• OPEN AND COLLABORATIVE
• FOCUSED AND IMPLEMENTABLE
• CONVERSATIONAL
• CREATIVE
• REALISTIC
• MEASURABLE
ELEMENTS OF A STRATEGIC PLAN

What are the fundamental beliefs?
Looking into a crystal ball,
What is our ideal future?
Who are we?
What do we do?
Whom do we serve?
**How are we different?**

What do we have to do
to achieve Mission
and move forward?
How will we know when
we have arrived?

**Desired Outcomes**
What are we going to do to
achieve our Desired
Outcomes?

**Why? What? Examples**

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**Core Values**

- Vision
- Mission
- Goals
- Strategies

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**Core Values**

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Inside ⇔ Outside

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STRATEGIC PLANNING STEERING COMMITTEE
STEP 2 (SEPTEMBER, 2019)

Initial Meetings:

- Town hall
- Small Group Discussions
Step 3 (September/October, 2019)

SPSC has Refined Vision, Mission, Strategic Priorities/Goals

- Core Values, Vision, Mission
- Strengths
- Needs/Opportunities
- Major Forces
- Planning Assumptions
- Top Strategic Priorities/Goals

STRATEGIC PLANNING STEERING COMMITTEE
STEP 4 (OCTOBER, 2019)

Feedback from University Community

ON

Core Values, Vision; Mission; Strengths, Needs; Major Forces; Planning Assumptions; Strategic Priorities/Goals
STEP 5 (NOVEMBER, 2019)

1. SPSC refines values, mission, vision, strengths and needs, planning assumptions, strategic priorities/goals

2. SPSC creates a cross-departmental Working Group for each Strategic Priority/Goal

3. Estimate revenues from traditional sources based on historical trends and planning assumptions: enrollment, etc.
STEP 6 (NOVEMBER/DECEMBER, 2019)

**Formulate Desired Outcomes – “Charting the Course”**

- Working Groups identify the Desired Outcomes, for example:
  - *Increase head count by 200 students*
  - *Increase first-year retention to 80 percent*
STEP 7 (JANUARY, 2020)

Second Town Hall
- Feedback on Desired Outcomes
- Begin Strategy Development
STEP 8  (FEBRUARY/MARCH 2020)

**Determine the Strategies**

- SPSC to assess priorities among current plan initiatives and select those that are most important to achieve desired outcomes
- The strategies selected will be:
  - Organized around goals
  - Work across organizational and campus lines
  - Emphasis on “big ideas”
  - Strategies are elaborated expressions of an idea
    - Intro and Background
    - Basic Elements and Description
    - Models
STEP 9  (APRIL, 2020)

Complete Plan and Seek Endorsements
CELEBRATION!