Integrated Institutional Planning:

Unifying Strategic, Master & Capital Plans to Maximize Results!

David Sayers & John Curtis

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1. Rationale for Integrated Institutional Planning
2. What type of Planning is needed?
3. Proper Planning to Balance Scope & Capacity
4. The Planning Process
5. The Structure of the Plan
6. Q & A
“The best way to prepare for the future is to create it!”

"It ain't so much what you don't know (about planning) that can hurt you, it's what you do know that just ain't so!"
Integrated Institutional Planning

A Better Process = Maximized Results

- Financially Sustainable
- Data-Driven Decisions
- Satisfied Stakeholders
- Clarity, Focus & Momentum
- Verifiable Impact
- High Performing Culture
- Institutional Commitment

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What Type of Planning Does Your Institution Need to Do?

1. Tactical Planning: short-term, “ad hoc,” typically has a single focus & closure

2. Long-range Planning: 1 year horizon, builds incrementally on past accomplishments, more, better, different of the same with annual checkups but not “strategic”

3. Strategic Planning: 1-5 year horizon, sets in motion a new non-existing set of actions, programs or services unencumbered by past or current realities with annual checkups
4. Scenario Planning: *explore possible alternative “realities” of what might impact your school to identify a relevant course of action in response*

5. Master Planning: *shows overall development concept that includes facilities, landscaping, infrastructure, service provision, circulation, present & future land use & building forms*

6. Capital Planning: *budgeting resources for the future of an institution's long term plans. Capital planning includes budgeting for new & replacement facilities, equipment & other major capital expenditures*
### Proper Integrated Planning to Balance Scope & Capacity

<table>
<thead>
<tr>
<th>Scope</th>
<th>Capacity</th>
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<tbody>
<tr>
<td><strong>B</strong></td>
<td><strong>D</strong></td>
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<tr>
<td>- Adding new programs / services</td>
<td>- Driven by integrated planning</td>
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<tr>
<td>- Limited resources impacts quality</td>
<td>- Focus on high performance</td>
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<td>- Existing staff, processes stressed</td>
<td>- Best elements of B &amp; C quadrants</td>
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<td>- Dependent on style of top leadership</td>
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<tr>
<td><strong>A</strong></td>
<td><strong>C</strong></td>
</tr>
<tr>
<td>- Start-up operations, programs, services</td>
<td>- Systematic growth &amp; development</td>
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<tr>
<td>- Limited resources, systems, processes</td>
<td>- Systems / processes in place</td>
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<td>- Driven by personality of top leadership</td>
<td>- Plans developed &amp; followed</td>
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<td>- Focus remains limited</td>
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WHAT IS THE PLANNING PROCESS?

The Planning PROCESS should determine your “As Is” & “To Be” state & produce a PLAN to close the gap!

Compelling Forces
- Increasing Demand
- Changing Expectations
- Regulatory Overreach
- Resource Restraints

The Gap

“As Is!”

Resistant Forces
- Capacity Limitations
- Mission Drift
- Conflicting Priorities
- “Sacred” Traditions

“To Be?”
Inventory: Starts with a “DesignShop” to make decisions regarding the entire planning process.

Mission: Answers the questions, “Why do we exist?” “What are we trying to accomplish?” “What is our future ideal state?”

Goal Areas: Broad areas of activities 1) Programs, 2) Services, 3) Staff, 4) Operations, 5) Facilities, 6) Governance, 7) Advocacy, 8) Community Relations, 9) Fundraising.

Objectives: Time-limited, measurable activities that define the goal areas.

Action Steps: Day-to-day activities necessary to achieve specific objectives.
The Structure of Integrated Planning

Mission / Case for Support / Value Proposition

Programs
- Objective
  - Action Steps
    1) 2) 3) 4)

Facilities
- Objective
  - Action Steps
    1) 2) 3) 4)

Fundraising
- Objective
  - Action Steps
    1) 2) 3) 4)
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Q & A
Thank You!

Integrated Organizational Development, Inc.
www.iodinc.com

David Sayers • 540-808-7997 • dsayers@iodinc.com
John Curtis • 407-493-7323 • jcurtis@iodinc.com