Integrated Institutional Planning:

Unifying Strategic, Master & Capital Plans to Maximize Results!

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AGENDA

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

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“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!"

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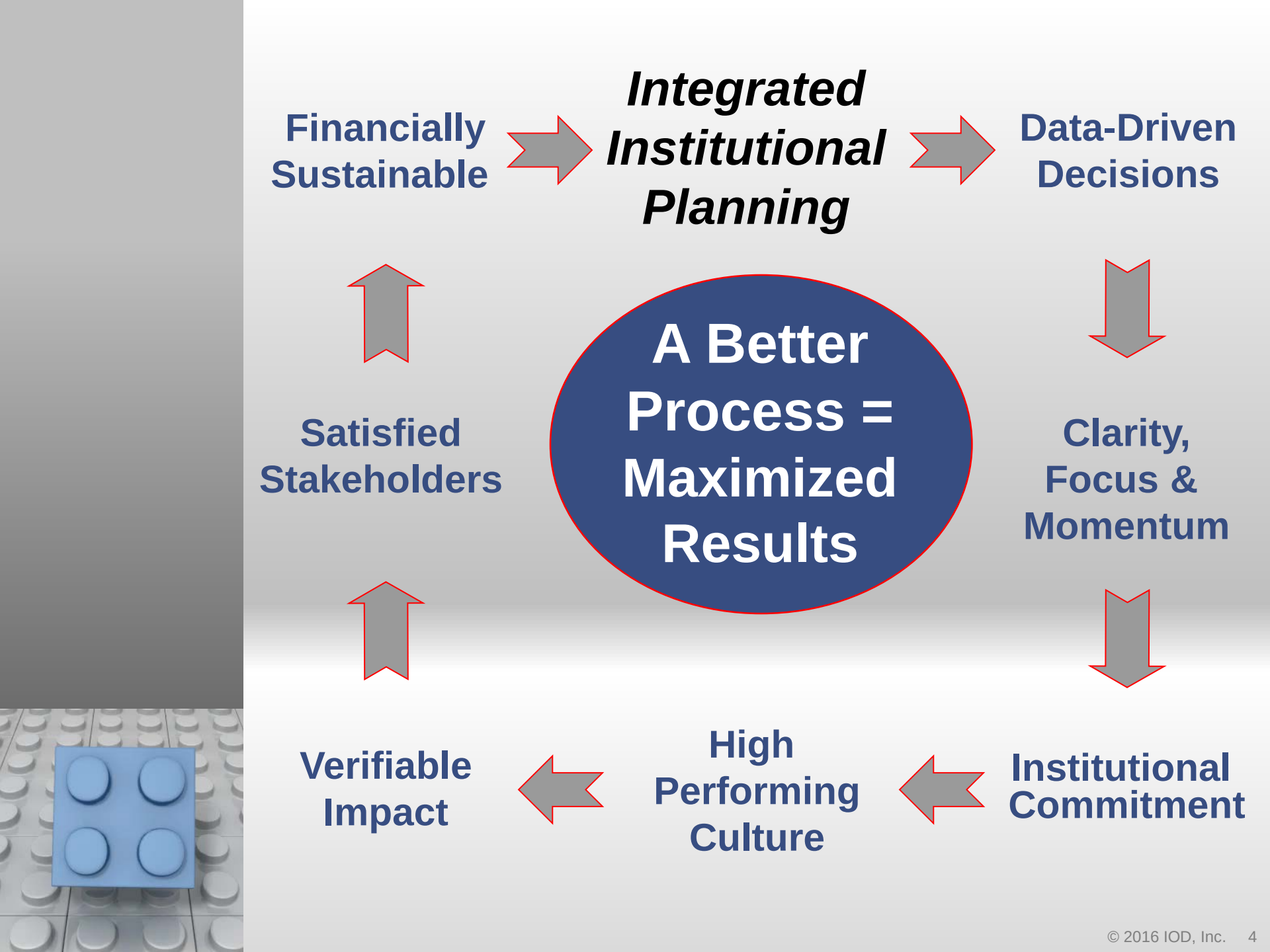
Financially Sustainable
Integrated Institutional Planning
Data-Driven Decisions
Satisfied Stakeholders
A Better Process = Maximized Results
Clarity, Focus & Momentum
Verifiable Impact
High Performing Culture
Institutional Commitment

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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***

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What Type of Planning Does Your Institution Need to Do? *(continued)*

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***

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Proper Integrated Planning to Balance Scope & Capacity

Scope

B

- Adding new programs / services
- Limited resources impacts quality
- Existing staff, processes stressed
- Dependent on style of top leadership

D

- Driven by integrated planning
- Focus on high performance
- Best elements of B & C quadrants

- Start-up operations, programs, services
- Limited resources, systems, processes
- Driven by personality of top leadership

A

- Systematic growth & development
- Systems / processes in place
- Plans developed & followed
- Focus remains limited

C

Capacity

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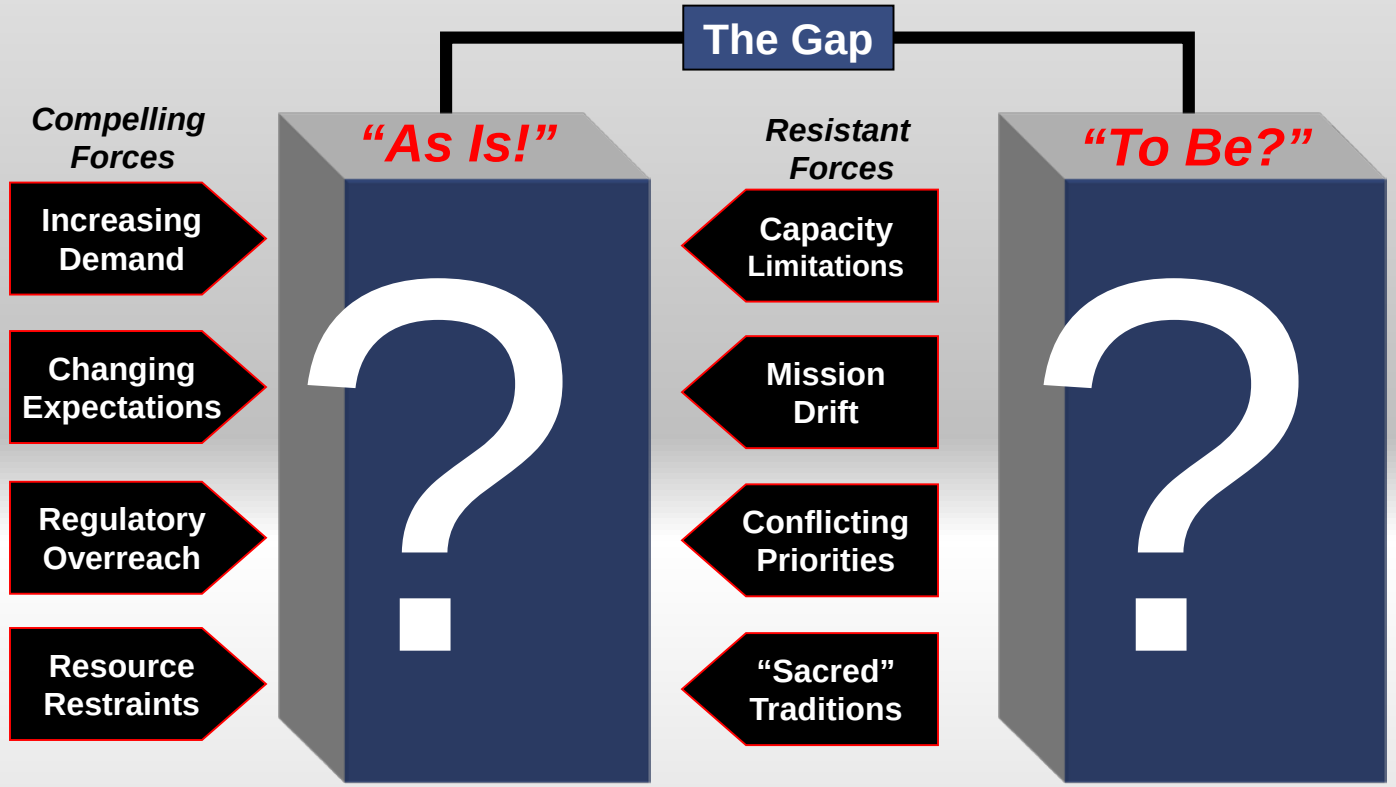
WHAT IS THE PLANNING PROCESS?

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



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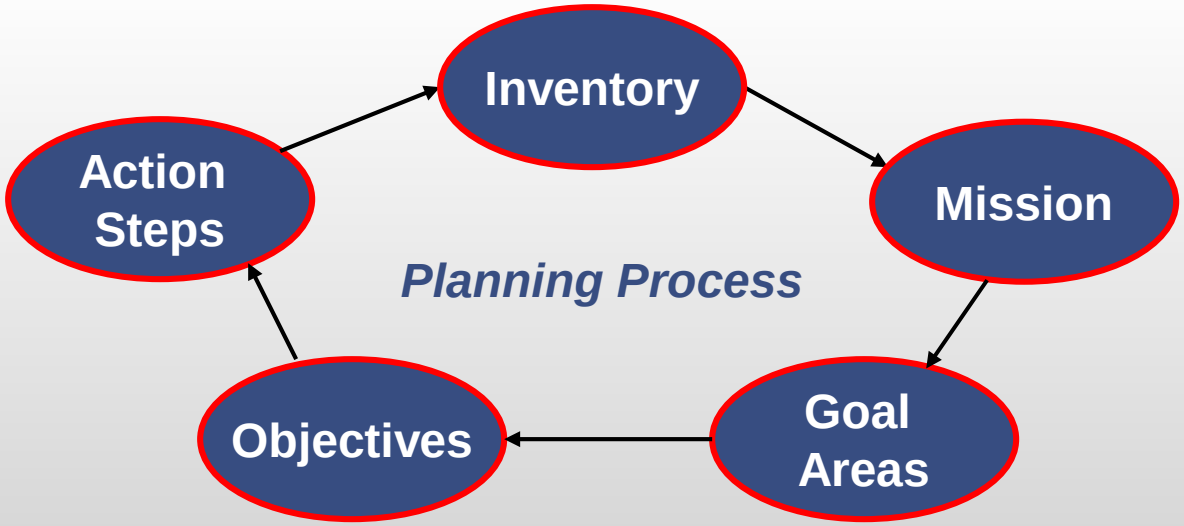

Inventory: Starts with a "*DesignShop*" to make decisions regarding the entire planning process.

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.

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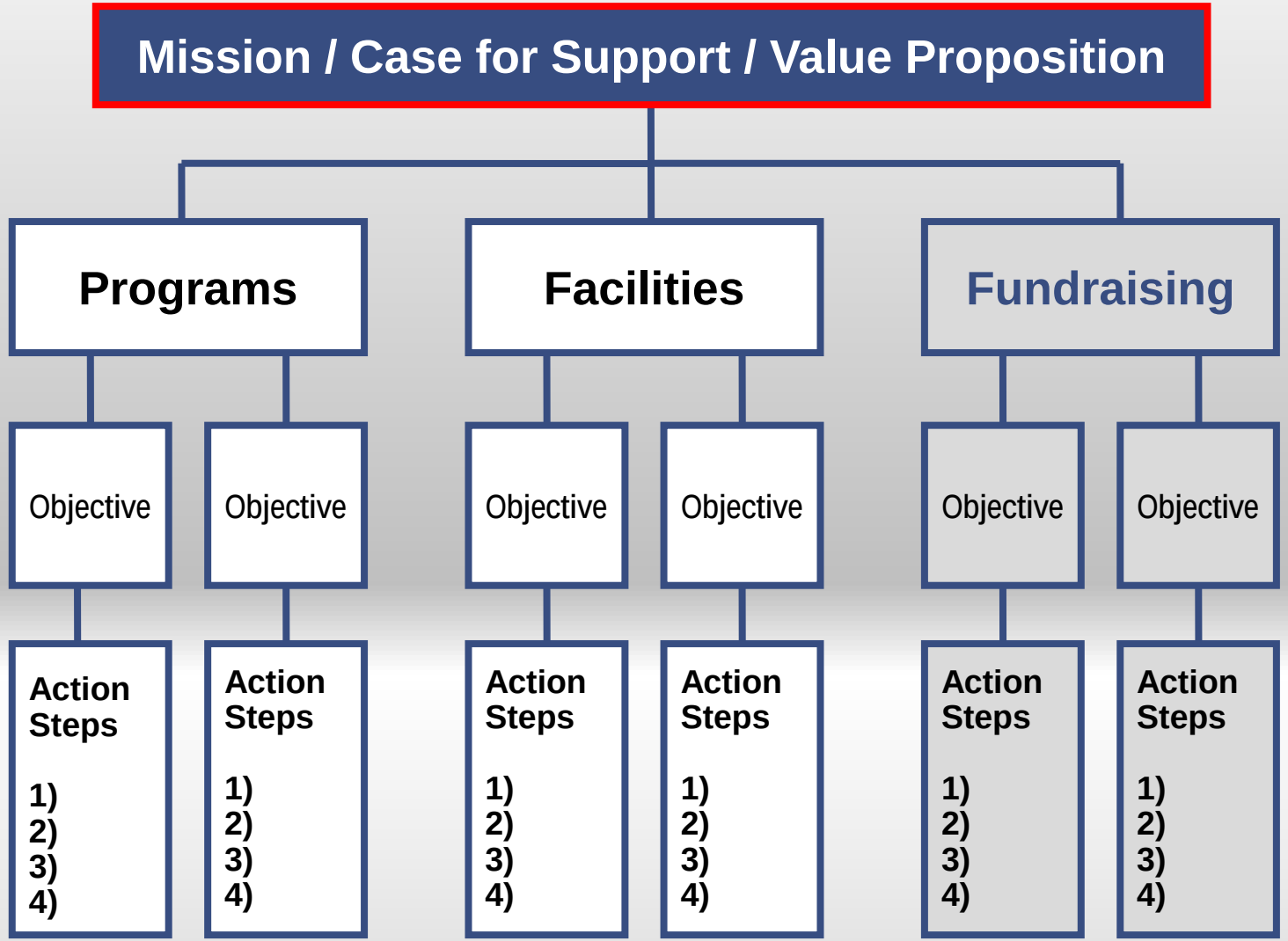
The Structure of Integrated Planning



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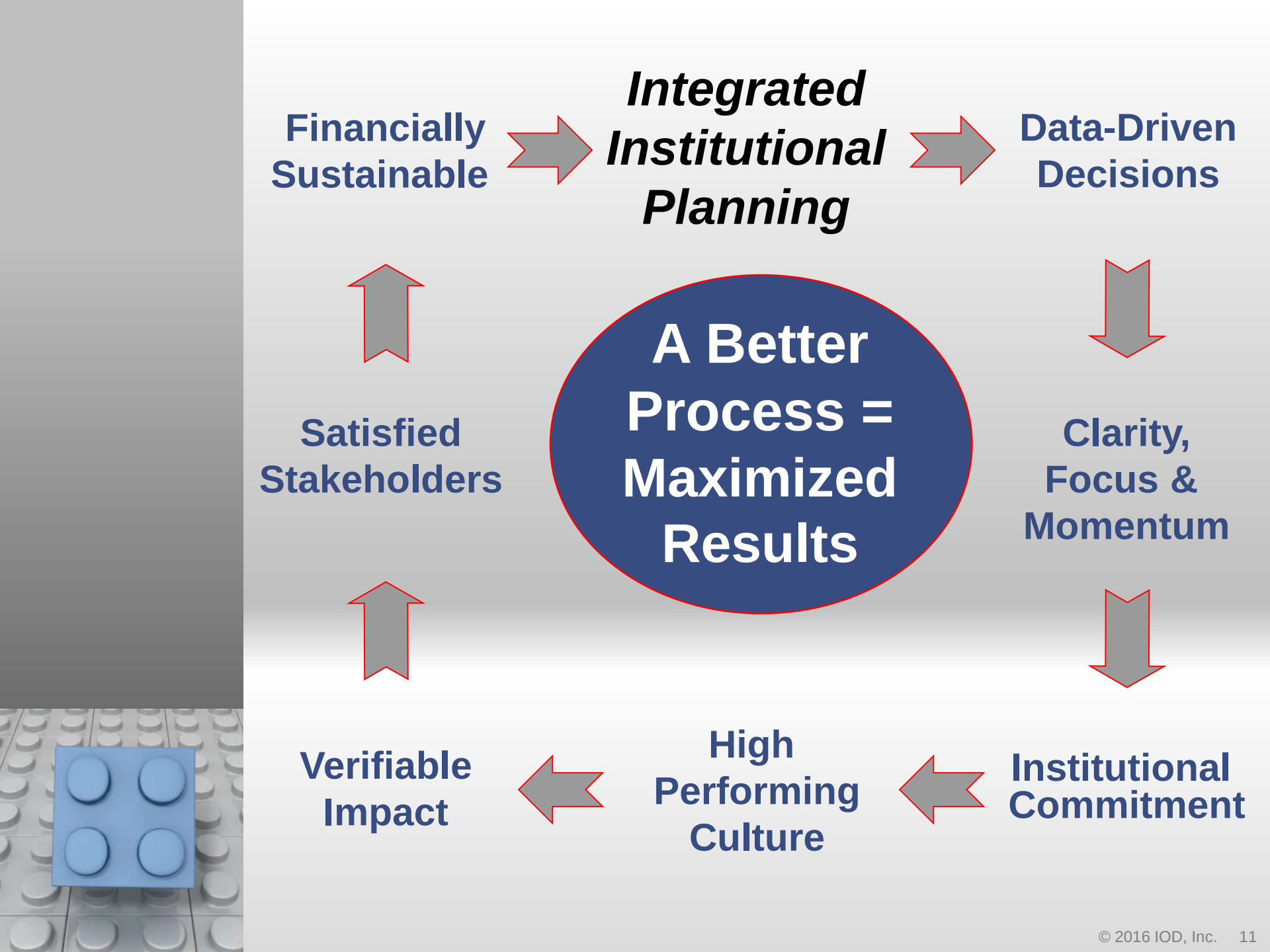
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Q & A

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Thank You!

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