

OINOS - STRATEGIC PLANNING PROCESS SCOPE AND SEQUENCE

- The following chart outlines the general Strategic Planning Process (ADVNC).
- The proposed methodology is comprised of 5 facilitated Subcommittee Meetings each with their respective objectives and interrelated tasks.
- Subcommittees will be appointed to analyze Critical Focus Areas identified by the institution’s leadership.
- Subcommittees will work independently before and after each facilitated meeting.

Meeting 1	Meeting 2	Meeting 3	Meeting 4	Meeting 5	Approval Process
Objective: Analyze	Objective: Design	Objective: Validate		Goal: Narrate	Goal: Communicate
Primary Tasks	Primary Tasks	Primary Tasks	Primary Tasks	Primary Tasks	Primary Tasks
<ol style="list-style-type: none"> Subcommittees will review organization’s Mission and initial Vision Statement goals in relation to their assigned Focus Area(s). Pertinent constituency comments will be discussed. Subcommittees will conduct a Strengths, Weakness, Opportunities, and Threats (SWOT) exercise pertaining to the current status of the Focus Area(s). Subcommittees will analyze the current status of its respective Critical Focus Area(s) and identify “gaps” between current and optimum conditions. 	<ol style="list-style-type: none"> Subcommittees will design initiatives that may be pursued to decrease the suggested Focus Area(s) “gaps” identified in Meeting 1. Subcommittee will review compiled initiatives and criteria and provide input to other subcommittees. They will review input from other subcommittees 	<ol style="list-style-type: none"> Subcommittees will develop and assess impact of each proposed Initiative according to following five Elements: <ul style="list-style-type: none"> • Mission • Constituency • Physical Plant • Operations • Funding Subcommittee will develop a chart of Expense/Revenue projections for each Initiative. 	<ol style="list-style-type: none"> Subcommittees will validate the 3-5 most vital Focus Area(s) Initiatives designed in Meeting 3 and develop the following metrics that will be required to evaluate and monitor their implementation. <ul style="list-style-type: none"> • Measurement Metrics • Performance Metrics • Operating Metrics Identify ownership of initiatives. Create an opportunities chart. Identify additional data that may be needed. 	<ol style="list-style-type: none"> Subcommittees will approximate the financial impact of each of the top 3-5 initiatives. Subcommittees will develop an Action Plan Narrative that describes the (a) rationale, (b) general steps, and (c) budget required to implement each of the 3-5 Focus Area(s) Initiatives. Subcommittees will develop an appropriate Narrative that describes how their Initiatives effectively advance the institution’s Mission and Vision. 	<ol style="list-style-type: none"> OINOS will integrate the Action Plans of each Subcommittee into an initial Strategic Plan draft document. Institution/department will review initial draft of the Strategic Plan OINOS will refine and prepare Final version of Strategic Plan. Institutional Leadership will review, approve, and vote on the formal adoption of Strategic Plan.

Proprietary and Confidential - for Discussion Only

Meeting Process

Meeting 1	Analyze Situation and Identify Gaps	Materials, Tasks, and Tools	Outcomes
Goal	Subcommittee will analyze the current status of their respective focus area(s) and identify the “gaps” between current and optimum (preferred Future) conditions.	<p>The following materials are required to achieve the objective of this Step:</p> <ol style="list-style-type: none"> 1. School Mission Statement 2. The “<i>Vision Statement</i>” document 3. Background information/data of Subcommittee’s primary focus 4. Working Group Flow Chart 5. Five-Element <i>SWOT Template</i> 	
Step 1	Subcommittee members will be invited to review the <i>Vision Statement</i> document and what is required for its goals/objectives to fully align with the College’s Mission Statement aspirations.	<ol style="list-style-type: none"> 1. Facilitator will distribute the College’s <i>Mission Statement</i> and the “<i>Vision Statement</i>” document to each participant. 2. Subcommittee will discuss the status of the documents’ current alignment. 3. Participants will use Working Group Flow Chart Tool 	<ul style="list-style-type: none"> • Discussion • Complete Flow Chart • Identify Gaps
Step 2	Subcommittee members will be invited to review and discuss data, resources, and information regarding the College and their assigned Focus Area(s).	<p>Subcommittee will examine and discuss pertinent data, resources and information regarding:</p> <ul style="list-style-type: none"> • College Operations and Trends, • Assigned Focus Area(s). 	<ul style="list-style-type: none"> • Discussion • Identify Gaps
Step 3	Subcommittee will conduct a SWOT exercise pertaining to the current status of the Focus Area(s) followed by a review and discussion of results.	<ol style="list-style-type: none"> 1. Each subcommittee member will complete a <i>SWOT Template</i> that includes the following list of 5 Elements: (a) Mission, (b) Funding, (c) Operations, (d) Constituency, and (e) Physical Plant for each SWOT quadrant. 2. Facilitator, or Subcommittee reporter will whiteboard the compiled results. 3. Subcommittee will be divided into 2-4 small working groups, each responsible for analyzing and clustering SWOT observations. 4. A general discussion will follow presentations from each quadrant group. 	<ul style="list-style-type: none"> • Completed <i>SWOT Analysis Template</i> • Discussion
Homework	<ol style="list-style-type: none"> 1. Subcommittee will complete SWOT Template including the Five-Element Analysis. 2. Subcommittee will identify gaps that exist between current and optimum (preferred future) conditions pertaining to their respective Focus Area(s). 3. Each of the Subcommittee’s Working Groups will use the conclusions of Meeting One’s discussions, and the Focus Area SWOT analysis to develop a list of Potential Initiatives that may be advanced to close “gaps” between the College’s Mission, current condition, and the <i>Vision Statement</i> aspirations. 		

Meeting Process

Meeting 2	Design Initiatives	Materials, Tasks, and Tools	Outcomes
Goal	Subcommittee to develop a list of proposed Initiatives that the College may choose to advance for the purpose of closing the gaps identified by the Focus Area SWOT analysis.	The following materials are required to achieve the objective of this Step: <ol style="list-style-type: none"> 1. SWOT Results 2. <i>Proposed Initiatives Template</i> 3. <i>Initiative Assessment Template</i> 4. <i>Subcommittee Action Plan Template</i> 	
Step 1	Presentation of SWOT Results.	Subcommittee members will discuss their collective GAP & SWOT quadrant Five-Element Results.	Presentation of SWOT Results
Step 2	Presentation of Focus Area(s) potential initiatives designed by Subcommittee Working Group(s) in Step 1.	Working Group will design and present their List of Potential Focus Area Initiatives.	Presentation of proposed Initiatives
Step 3	Subcommittee will review and assess each list of potential initiatives.	Subcommittee members will begin the evaluation of proposed Initiatives using the Initiative Assessment Template.	Initiatives may be added, refined, and/or removed from consideration.
Homework	<ul style="list-style-type: none"> • Subcommittee will complete any uncompleted Meeting Two tasks. • Individual members and/or Working Groups will design specific details for each of their respective lists of proposed initiative using the <i>Subcommittee Action Plan Draft Template</i>. 		

Meeting Process

Meeting 3	Validate Highest Ranking Initiatives	Materials, Tasks, and Tools	Outcomes
Goal	Each Subcommittee will identify the top ranking 3-5 Initiatives designed in Meeting 2 based on a review and evaluation of their overall impact.	<p>The following tools are required to achieve the objective of this Step:</p> <ul style="list-style-type: none"> • <i>Proposed Initiatives Template</i> • <i>Initiative Evaluation Template</i> • <i>SMART Action Steps Template</i> • <i>Action Plan Template</i> 	
Step 1	The Subcommittee will review and discuss the Initiative Assessment Template results from Meeting 2.	<ol style="list-style-type: none"> 1. Review <i>Initiative Assessment (Step 1) Template</i> result totals 2. Consensus should be reached on the highest ranked potential Initiatives in terms of (a) strategic alignment, and (b) urgency. 	Initiatives with the highest Alignment/Urgency Scores
Step 2	Compilation of financial, and feasibility impact scores for each proposed initiative.	<ol style="list-style-type: none"> 1. Subcommittee will score and discuss the (a) financial, and (b) feasibility impact scores of each proposed initiative. 2. Subcommittee will add Financial/Feasibility Scores to previous Alignment/Urgency Assessment Scores for each initiative. 	Initiatives with the highest Total (Alignment/Urgency + Financial/Feasibility) Assessment Scores
Step 3	Consensus of Meeting Outcomes	<ol style="list-style-type: none"> 1. Grouping & identification of most vital (highest scores) initiatives. 2. Consensus on the most vital initiative should be reached through simple hand vote. 	Consensus concerning the 3-5 Initiatives that will be included in the Subcommittee's Final Action Plan Report.
Step 4	Introduction to SMART Methodology.	<ol style="list-style-type: none"> 1. Facilitator will introduce and instruct participants to the SMART Action Planning Method. 2. Committee will begin to develop SMART Action Steps for each of (3-5) the highest ranked Initiatives. 	Understanding of SMART Action Planning Method.
Homework	<ul style="list-style-type: none"> • Subcommittee Working Groups <u>will be assigned</u> to begin the development of Action Plans for the 3-5 highest-ranking Initiatives. • Each Action Plan will include appropriate SMART Action Steps. • Subcommittee Leader(s) will oversee the development of SMART Action Steps for each Initiative. 		

Meeting Process

Meeting 4	Action Plan Development	Materials, Tasks, and Tools	Outcomes
Goal	Each Subcommittee will begin to develop a comprehensive Action Plan that includes the Rationale, SMART Action Steps, and Capital required to implement the 3-5 Initiatives developed by their respective Working Groups.	<p>The following materials are required to achieve the objective of this Step:</p> <ol style="list-style-type: none"> 1. <i>SMART Action Steps developed by Initiative Working Groups</i> 2. <i>Subcommittee Action Plan Template</i> 	
Step 1	Working Groups will present the SMART Action Steps for their respective Initiative assignment.	Subcommittee will review, refine, and reach consensus concerning Working Group presentations.	Subcommittee Consensus
Step 2	Facilitator will familiarize Subcommittee with each component of the Action Plan Template	Action Plan Template	Subcommittee Understanding
Step 3	Subcommittee will begin to integrate Working Group Initiatives into one comprehensive Action Plan that includes the Rationale, Action Steps, and Capital required for implementation.	Subcommittee will use the Action Plan Template to integrate the SMART Action Steps of each Working Group Initiative by assigning working groups to author specific components.	Action Plan Component Authoring Assignments
Homework	<ul style="list-style-type: none"> • Working groups will continue the development of their assigned component of the Action Plan. • Working groups will submit the draft of their <u>completed component</u> to the Subcommittee Chair(s) and Facilitators <u>prior to Meeting 5</u>. • With the assistance of their respective Facilitators, each Subcommittee Chair(s) will review and <u>integrate components into the Final Action Plan Draft that will be presented at Meeting 5</u>. 		

SMART Action Plan Components

Initiative <i>Description of Goal(s)</i>	Specific <i>Description of Objective(s)</i>	Measurable <i>Metrics for Evaluation</i>	Attainable <i>Process for Achievement</i>	Relevant <i>Strategic Mission/Vision Statement</i>	Timely <i>Tracking/Deadlines</i>
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