

MEMORANDUM FOR: UNG Planning Team Summer Task Force

SUBJECT: Summer Task Force Preparation to Support Strategic Planning

1. GENERAL. Strategic planning has been shifted to the fall semester of 2013. The intent of this shift is to insure significant and broad faculty participation in the planning process. This adjustment also facilitates incorporation of the results of the University System of Georgia strategic plan, which is due for release in August. **The purpose of the summer task force is to insure that faculty and staff can swiftly transition into the planning process following the start of the semester.** The goal is to have the strategic plan in sufficient detail to support budget development in the fall of 2013. The plan need not be in its final form, but must be sufficiently developed to the point where it can be used in resource decisions for fiscal year 2015 (Academic Year 2014-2015).

2. TASK FORCE COMPONENTS. The Summer Task Force (STF) will accomplish its work in teams that are focused on development of process and critical information requirements necessary to support the process. The STF will be composed of three teams; Mission Analysis Team, Process Action Team, and Collection and Analysis Team. Tasks for each team are described in succeeding paragraphs.

- a. **Mission Analysis Team (MAT).** The MAT will conduct preliminary mission analysis in order “unpack” requirements derived from Board of Regents policy and draft planning documents as well as other guidance from organizations that establish constraints, restrictions or operational direction to the institution. **This includes not just an analysis of the university’s new mission statement and draft vision and values, but also an analysis of agency strategic plans and policies that impact university planning.** In addition to the USG strategic plan, these may include plans of the Georgia Department of Education, US Army Cadet Command, the Technical College System of Georgia, and the Georgia Department of Economic Development, among others. Deliverables at end state include a preliminary comprehensive analysis of specified, implied and critical tasks to guide planning along with proposed presidential guidance to the faculty and staff planners.
- b. **Process Action Team (PAT).** **The PAT will develop the detailed planning process for the university to include the planning timeline.** Process must result in a tentative or draft planning document that can inform budgeting no later than the end of October 2013. The PAT will also develop the cyclical annual operational planning process that facilitates assessment, feedback and planning adjustments necessary to achieve systematic data driven decision making. PAT deliverables include the university strategic planning process, the annual university operational planning process and timelines associated with each, and recommended plan format. Process concept will include nested requirements for planning at major unit levels within the university. The planning process must address the requirement for synchronizing major operational

systems of the university (enrollment management, curriculum management, resource management, etc.) in accomplishing the institutional mission.

- c. **Collection and Analysis Team (CAT).** The CAT serves as the “intelligence gathering” component of the task force. It will review the environmental scan report and conduct a more detailed strengths, weaknesses, opportunities, and threats (SWOT) analysis specific to our regional footprint. Partnerships should be included in the opportunities component of this evaluation. The CAT will review and compile data on available assets, both internal and external, that may be employed in accomplishing the institutional mission. It will identify critical information needs to support planning and collect, analyze, and package this information for faculty use during planning. Major deliverables include a tabular SWOT analysis and accompanying narrative, assessment of regional “clients” and their needs, evaluation of regional and national competitors and potential partners including the military mission component.

3. COORDINATING INSTRUCTIONS.

- a. Team composition may be expanded at the discretion of the team leader. The intent is the development of information, process and structure that will facilitate a rapid transition of faculty and staff planners into the process fully equipped with whatever they need to develop an effective plan. Tentative team composition is at enclosure 1.
- b. STF project development will occasionally require participants to travel for a variety of purposes. Travel for team and task force meetings will be resourced through Executive Affairs. Point of contact for routing of reimbursement requests will be through Melissa Grizzle, Center for Global Engagement.
- c. Throughout summer session, Thursday mornings 0900-1200 will be reserved for team and task force meetings. STF meetings will not occur every Thursday. Tentative schedule for STF meetings is at enclosure 2. These meetings will be used to share information and for task force discussion of team research and deliverables as they are developed.
- d. Task force members are encouraged to consider this an opportunity for professional development. Numerous webinars and professional development materials are available to support STF work. With prior approval, Executive Affairs will fund webinar participation at the request of team leaders.
- e. Enclosure 3 provides a list of recommended articles and books related to strategic planning. Most of the articles are free. Team leaders are encouraged to develop their own list of informative readings as they deem necessary. They may select from among the books listed or from other works they are familiar with that support our work.
- f. Executive Affairs will provide limited funding for purchase of books to support team member preparation and professional development. The strategic planning web site will serve as a repository of strategic planning resource materials.

4. POINT OF CONTACT. Point of contact for this memorandum is Billy Wells, Vice President for Executive Affairs. Phone 706.864.1630. Email billy.wells@ung.edu .

Enclosure 1: Team Composition

MISSION ANALYSIS TEAM	PROCESS ACTION TEAM	COLLECTION & ANALYSIS TEAM
Mary Carney	Donna Gessell	Betsy Cantrell
Eric Skipper	Margaret Venable	Leo Downing
Mark Spraker	Benny Wyrick	Jason Pruitt
Billy Wells*	Denise Young*	Mary Transue*
* Team Leader Teams are free to add members if necessary to support their work. Task force level deliberations will involve only the core planning team above.		

Enclosure 2: Tentative Summer Task Force Meeting Schedule.

DATE	EVENT	NOTES
30 MAY	TEAM MEETINGS	
6 JUNE	TEAM MEETINGS	
13 JUNE	TEAM MEETINGS	
20 JUNE	TASK FORCE MEETING	CROSS TEAM INFO BRIEFS
27 JUNE	TEAM MEETINGS	
4 JULY	HOLIDAY	NO SCHEDULED ACTIVITY
11 JULY	TEAM MEETINGS	
18 JULY	TASK FORCE MEETING	CROSS TEAM INFO BRIEFS
25 JULY	TEAM MEETINGS	
1 AUGUST	TEAM MEETINGS	
8 AUGUST	TEAM MEETINGS	
15 AUGUST	TASK FORCE MEETING	FINALIZE DELIVERABLES
19 AUGUST	FALL CLASSES BEGIN	MISSION COMPLETE

Enclosure 3: References and Resources

BOOKS

Birnbaum, R. (1988). *How Colleges Work: The Cybernetics of Academic Organization and Leadership*. San Francisco CA. Jossey-Bass.

Christensen, C. M., Eyring, H. J. (2011). *The Innovative University; Changing the DNA of Higher Education from the Inside Out*. San Francisco, CA. Jossey-Bass.

Clark, B. (1992). *The Distinctive College*. Transaction Publishers. New Brunswick, NJ.

Department of the Army (DA) (2012). ADP 5-0, The Operations Process. Washington, DC. Department of the Army. http://armypubs.army.mil/doctrine/DR_pubs/dr_a/pdf/adp5_0.pdf

Department of the Army (DA) (2011). ATP 5-0.1. Commander and Staff Officer Guide. Washington, DC. Department of the Army. http://armypubs.army.mil/doctrine/DR_pubs/dr_a/pdf/atp5_0x1.pdf

Hinton, K. (2012). *A practical Guide to Strategic Planning in Higher Education*. Society for College and University Planning. <http://oira.cortland.edu/webpage/planningandassessmentresources/planningresources/SCPGuideonPlanning.pdf>

Keller, G. (1983). *Academic strategy: The management revolution in American higher education*. Baltimore, MD: Johns Hopkins University Press.

Middaugh, M. (2010). *Planning and Assessment in Higher Education*. San Francisco, CA. Jossey-Bass.

Lattuca, L., Stark, J. (2009). *Shaping the College Curriculum: Academic Plans in Context* (2nd Ed.). San Francisco CA. Jossey-Bass.

Toma, J. (2010). *Building Organizational Capacity: Strategic Management in Higher Education*. Baltimore MD, Johns Hopkins University Press.

NOTES: Of the above, Hinton's (2012) work is the most concise and usable guide. Keller's (1983) book is considered a classic in higher education strategic planning. Clark's (1992) and Birnbaum's (1988) books are also considered classics, but they are not focused on strategic planning necessarily. They do provide quite a bit of context for planning. Certain chapters of the military manuals can be helpful in developing the process as they are well laid out and procedurally rational. However, higher education's planning environment is not as straightforward, and this context must be taken into consideration.

ARTICLES AND DOCUMENTS

- Allen, D. K. (2003). Organizational Climate and Strategic Change in Higher Education: Organizational Insecurity. *Higher Education*, 46 (1), 61-92.
<http://www.jstor.org/stable/3447562>.
- Buchbinder, H. (1993). The Market Oriented University and the Changing Role of Knowledge. *Higher Education*. 26 (3) 331-347. <http://www.jstor.org/stable/3447596> .
- Chaffee, E. (1984). Successful Strategic Management in Small Private Colleges. *The Journal of Higher Education*. 55 (2), 212-241. <http://www.jstor.org/stable/1981186>.
- Cunningham, R., Eddy, M., Pagano, M, Ncube, L. (2011). Purdue Extended Campus: Transparency, Accountability, and Assessment in Strategic Planning. *Continuing Higher Education Review*. 75, 153-163. <http://www.eric.ed.gov/PDFS/EJ967816.pdf>
- Dooris, M. (2003) Two Decades of Strategic Planning. *Planning for Higher Education*. 31 (2), 26-32. http://www.psu.edu/president/pia/planning_research/reports/twodecades.pdf
- Dooris, M., Kelley, J. Trainer, J. (Eds.) (2004). Special Issue: Successful Strategic Planning. *New Directions for Institutional Research*. 123. Pp. 1-138.
<http://onlinelibrary.wiley.com/doi/10.1002/ir.v2004:123/issuetoc>
- Kezar, A. and Eckel P. (2002). The Effect of Institutional Culture on Change Strategies in Higher Education: Universal Principles or Culturally Responsive Concepts? *The Journal of Higher Education*. 73 (4), 435-460. <http://www.jstor.org/stable/1558422>.
- Kotler, P., Murphy, P. (1981). Strategic Planning for Higher Education. *The Journal for Higher Education*. 52 (5), 470-489. <http://www.jstor.org/stable/1981836> .
- Munck, R., McConnell, G. (2009). University Strategic Planning and the Foresight/Futures Approach, an Irish Case Study. *Planning for Higher Education*. 38 (1), 31-40.
<http://www.dcu.ie/community/Planning.pdf>
- Paris, K. A. (2003). Strategic Planning in the University. University of Wisconsin System Board of Regents.
<http://oqi.wisc.edu/resourcelibrary/uploads/resources/Strategic%20Planning%20in%20the%20University.pdf>
- Simsek, H., Louis, K. (1994). Organizational Change as Paradigm Shift: Analysis of the Change Process in a Large, Public University. *The Journal of Higher Education*. 65 (6) 670-695.
<http://www.jstor.org/stable/2943824> .

NOTES: No specific recommendations from this list. However, the 2004 special issue of New Directions for Institutional Research contains a wealth of planning articles of value.

WEB SITES

Society for College and University Planning. <http://www.scup.org/page/index> .

Association for Institutional Research. <http://www.airweb.org/pages/default.aspx> .

NOTES: SCUP is an organization is totally dedicated to university planning and provides significant resources. Similarly AIR has a number of resources that support strategic planning.