The future is more than an extension of the past.
Planning without execution is as useless as execution without planning.
The Challenges of Strategic Planning

❖ It is fixed. But the future isn’t.
❖ It is top-down, analytic, linear, logical. But life isn’t.
❖ It is detached. But work isn’t.
❖ It is not dialogic. But execution is.
❖ It is not iterative. But implementation is.
❖ It does not learn. But we do.

The Challenges of Avoiding Strategic Planning

❖ The future is simply the past, later.
❖ Everything Is important. So nothing is important.
❖ Directionless
❖ Uninspiring
❖ Random
❖ Exhausting
Planning and doing need to be brought more closely together.
For many academic units, strategy *at the top* adds confusion, while strategy *in the doing* achieves results.

Is there a way to have structure align with planning while putting the planning closer to the doing?
The Planning Guide Method

An approach to consider

How Long is a Planning/Doing Cycle?

❖ 10 Years?
❖ I forget...
❖ Not Urgent
❖ Not Realistic
❖ Things Change
How Long is a Planning/Doing Cycle?

❖ 1 Year?
   ❖ Too easy, or
   ❖ Impossible to Achieve
   ❖ Not Bold, or
   ❖ Not Realistic

How Long is a Planning/Doing Cycle?

❖ 3 Years is Goldilocks
   ❖ Stretch but not too far
   ❖ Short enough to remember
   ❖ Long enough for bold accomplishments
Planning Guide Heart

What one thing, if achieved, would fundamentally improve us and move us forward?

Planning Guide Organization

- Introduction/Assumptions
- Initiatives
- Appendix of Responsibilities
Planning Guide Organization

Introduction/Assumptions

- University Enrollment
- Unit Enrollment
- Economic Projections
- Unit Resources

Planning Guide Organization

Initiatives

- Programs, Curriculum and Teaching
- Budget and Finance
- Facilities and Equipment
- Diversity and Inclusion
- Faculty and Staff
- Student Life
- Enrollment Management
- Image Enhancement
- Community and Extension Services
- Evaluation, Assessment and Planning
What one thing, if achieved, would fundamentally improve us and move us forward?
Planning Guide Organization

Initiatives have three sections

❖ Title
❖ Description
❖ Action Plan

Planning Guide Organization

❖ Programs, Curriculum and Teaching

❖ Initiative: Consider New degree in X

❖ Description: X is a rising degree due to the number of emergent tech positions that call upon it. For our unit to remain a leader in our field, we will explore a degree in X.

❖ Action plan: Drs. Y and Z will partner with staff members B and C to explore the X degree. Results will be reported by __ with a recommendation by __ .
So there is a way to have structure align with planning while putting the planning closer to the doing!

But not this.  

This.
Planning Guide Organization

Questions about Initiatives

How Many?
Who?
When?
How?
Planning Guide Organization

Appendix of Responsibilities

- Sorted and Organized by Individual
- Second Appendix could also sort by Initiative
- Becomes quick reference chart

Planning Guide Organization

Appendix of Responsibilities

By Individual

- Professor Jones
  - X degree
  - Graduate Recruitment
  - Course Rotation
  - WV Student Recruitment
  - Ideal Enrollment Distribution
  - Public School Outreach

- Professor Smith
  - Inventory update
  - Lab scheduling
  - Y Degree Sunset
  - VIP cultivation
  - Student Life issue
Planning Guide Organization

Appendix of Responsibilities

By Initiative

- X Degree
  Prof. Jones
  Prof. Plum
  Assoc Dean Pete
  Exec Ass’t James

- Lab Scheduling
  Prof. Smith
  Prof. Apple
  Lab Ass’t Henry
  GA Hooper

A year in the life of planning guide
Planning and Doing

Planning Guide Advantages

❖ Planning is Much Closer to Doing
❖ Structure Aligns to Plan
❖ Network instead of Hierarchy
❖ Weigh-In Increases Buy-In
❖ It is Flexible
❖ It is Iterative

IF “Plan A” Didn’t Work. The alphabet has 25 more letters! Stay Cool.
Instead of PLAN do. It’s PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do PLAN do
Strategic Planning

The future is more than an extension of the past and the best way to predict it is to invent it.

I AM HERE TO HELP

mark.mccoy2@mail.wvu.edu
A Planning Guide for the [academic unit]

West Virginia University
2021-2024

"The future must be more than an extension of the past..."
INTRODUCTION

A. PROGRAMS, CURRICULUM AND TEACHING
B. ENROLLMENT MANAGEMENT
C. DIVERSITY AND INCLUSION
D. BUDGET AND FINANCES
E. FACILITIES AND EQUIPMENT
F. FACULTY AND STAFF
G. STUDENT LIFE
H. COMMUNITY AND EXTENSION SERVICES
I. EVALUATION, ASSESSMENT AND PLANNING
J. IMAGE ENHANCEMENT AND FUND RAISING

APPENDIX A SUMMARY OF RESPONSIBILITIES BY FACULTY/STAFF

APPENDIX B SUMMARY OF RESPONSIBILITIES BY INITIATIVE
Introduction

This is the first in a recurring series of major planning efforts for the [academic unit]. These are done at three-year intervals. Year one includes creation and adoption of the three-year plan; year three includes assessment and evaluation.

Consideration of various forces anticipated during the next three years has lead to the following assumptions.

- **University Enrollment.** Considering current demographics, enrollment is expected to ___________ in the next three years.
- **Unit Enrollment.** Ideal enrollment of ____ undergraduates and ___ graduate students is expected to continue during this cycle.
- **Economic Projections.** Institutional financial fortunes are linked to external forces. Though impossible to predict, given the current state of the economy, budgets are likely to tighten.
- **Institutional Resources.** West Virginia University has always run on a very “tight” budget. Large sums of additional monies are considered unlikely.
- **[academic unit] Resources.** Significant gains in resources could be [improved/diminished] in the period [by doing this] [because of this].

An intermediate set of goals of the [academic unit] is set forth below.

- To maintain the highest possible standards of quality instruction;
- to seek the greatest possible diversity of faculty, students and experiences;
- to foster inclusion in every undertaking;
- to create a positive atmosphere of collegiality and goals-based management;
- to foster the qualitative and quantitative growth of the [academic unit] and its students;
- 
- 
- 
- 

The members of the [academic unit] construct the plan that follows. A status report on the previous planning guide will be given. X topics follow, each with a description and action plan.

**A. Programs, Curriculum and Teaching**

**Review of the Previous Plan**

1. This is the first planning effort. Future planning guides will include this review.
A. Programs, Curriculum and Teaching
Agenda for current planning period

1. Revise curriculum for X.
The X Degree has too many requirements, resulting in burnout and high attrition. The goal of the revision is to drop hours from X to Y or lower and to lessen other requirements as necessary.

Action Plan: Faculty refine the plan for a degree with X-credits in subject area. Dr. X will work with subject area; Drs. Y, and Z will work with General Studies. The goal is a 120-hour curriculum.

2. Explore the possibility of a degree in X.
1. X is a rising degree due to the number of emergent tech positions that call upon it. For our unit to remain a leader in our field, we will explore a degree in X.

Action Plan: Dr. X will examine several degree curricula from other institutions and report to the faculty. Dr. Y will begin to explore the possibility with administration. Dr. Z will work with other committees.
B. Enrollment Management

Review of the Previous Plan

1. This is the first planning effort. Future planning guides will include this review.

B. Enrollment Management

Agenda for current planning period

1. Initiative
   Description
   Action Plan
C. Diversity and Inclusion
Review of the Previous Plan

1. This is the first planning effort. Future planning guides will include this review.

C. Diversity and Inclusion
Agenda for current planning period

1. Initiative
   Description
   Action Plan
D. Budget, Finances and Fund Raising

Review of the Previous Plan

1. This is the first planning effort. Future planning guides will include this review.

D. Budget, Finances and Fund Raising

Agenda for current planning period

1. Initiative
   Description
   Action Plan
E. Facilities and Equipment

Review of the Previous Plan

1. This is the first planning effort. Future planning guides will include this review.

E. Facilities and Equipment

Agenda for the Current Period

1. Initiative
   Description
   Action Plan
F. Faculty and Staff

Review of the Previous Plan

1. This is the first planning effort. Future planning guides will include this review.

F. Faculty and Staff

Agenda for the current period

1. Initiative
   Description
   Action Plan
G. Student Life

Review of the Previous Plan

1. This is the first planning effort. Future planning guides will include this review.

G. Student Life

Agenda for current planning period

1. Initiative
   Description
   Action Plan
H. Community and Extension Services
Review of the Previous Plan

1. This is the first planning effort. Future planning guides will include this review.

H. Community and Extension Services
Agenda for the Current Period

1. Initiative
   Description
   Action Plan
I. Evaluation, Assessment and Planning

Review of the previous plan

1. This is the first planning effort. Future planning guides will include this review.

I. Evaluation, Assessment and Planning

Agenda for the Current Period

1. Initiative
   Description
   Action Plan
J. Image Enhancement and Fund Raising

Review of the previous plan

1. This is the first planning effort. Future planning guides will include this review.

J. Image Enhancement

Agenda for the Current Period

1. Initiative
   Description
   Action Plan
# Appendix A Summary of Responsibilities by Faculty

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