



SCUP PLANNING INSTITUTE

STEP I

Notes on the Workshop

Step I, Foundations of Planning within the Context of Higher Education, is considered the overview of planning, the theory and reasoning behind integrating the various disciplines and parties on a campus.

Learning Outcomes

Participants will understand (1) the basic elements of planning; (2) the practice of integrated planning; (3) the social and political context of integrated planning; (4) the value of evidence-based planning; and will form a network of others across the various disciplines.

FOUNDATIONS OF PLANNING WITHIN THE CONTEXT OF HIGHER EDUCATION

| MONTH | | | | | | |
|-------|----|----|----|----|----|----|
| S | M | T | W | T | F | S |
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |
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| Day | Topic | Notes | Location | Time |
|-----|---|---|----------|---------------------|
| 1 | BREAKFAST | | | 7:30 AM - 8:00 AM |
| 1 | INTRODUCTION | Introduction of faculty, overview of the workshop, and learning objectives of the workshop | | 8:00 AM - 8:15 AM |
| 1 | THE CORE COMPETENCIES OF PLANNING | Articulating who we are - Exercise: Mission/Vision/Values Developing a planning vocabulary. Exercise: Berlitz Planning | | 8:15 AM - 9:00 AM |
| 1 | INTEGRATED AND STRATEGIC PLANNING | The elements of integrated and strategic planning. | | 9:00AM - 10:00 AM |
| 1 | BREAK | | | 10:00 AM - 10:15 AM |
| 1 | STRATEGIC PLANNING PROCESSES | Exercise: the opportunity; the mandate for Walnut College Exercise: identifying gaps between vision and reality using Walnut College case study | | 10:15 AM - 11:00 AM |
| 1 | ANALYSIS OF INTERNAL AND EXTERNAL CONTEXT | Analysis of planning and strategy-setting environments: context; the four key questions. Exercise: Decision-making at Walnut College | | 11:00 AM - 12:00 PM |
| 1 | LUNCH | | | 12:00 PM - 1:00 PM |
| 1 | ANALYSIS OF INTERNAL AND EXTERNAL CONTEXT | Analysis of planning and strategy-setting environments: the four key questions. Exercise: Analysis using the four key questions Exercise: SWOT analysis | | 1:00 PM - 2:00 PM |
| 1 | BREAK | | | 2:00 PM - 2:15 PM |
| 1 | DECISIONS AND STRATEGIC STATEMENTS | Framing a strategy in words. Tangibles associated with strategic statements Exercise: Assessment for Walnut College | | 2:15 PM - 3:45 PM |
| 1 | TIMELINES AND WRITTEN PLANS | Pulling the strategy together Exercise: planning committee and planning timeline | | 3:45 PM - 4:45 PM |
| 1 | WRAP-UP | Facilitated Q&A concerning real case problems from participants based on the day's material | | 4:45 PM - 5:00 PM |