

SCUP PLANNING INSTITUTE

STEP II DAY 1



Notes on the Workshop

Step II, Focused Knowledge for Integrated Planning Processes, picks up where Step I left off. The SCUP Walnut College case study is again the basis for practicing an integrated planning process that results in a plan reflecting the collaboration of all functional areas at Walnut College. In the process of creating the plan, participants will gain a deeper understanding of the needs and issues confronting key functional areas on campus during a planning initiative.

Learning Outcomes

Participants leave Step II having (1) worked in functional and cross-functional teams to identify significant planning priorities for Walnut College; (2) collaborated on the strategies Walnut College should pursue; (3) written a plan for Walnut College, that includes goals, priorities, communication strategies, and benchmarks; and (4) determined actions to incorporate integrated planning practices on the Walnut Campus

FOCUSED KNOWLEDGE FOR INTEGRATED PLANNING PROCESSES

Day	Topic	Notes	Location	Time
1	INTRODUCTION	Introduction of faculty, overview of the workshop, and learning objectives of the workshop		8:00 AM - 8:15 AM
1	THE SIX CORE COMPETENCIES	Review of the six core competencies of planning. Establishing workshop vocabulary and definitions		8:15 AM - 8:30 AM
1	STRATEGIC PLANNING PROCESSES	Review of mission, vision, values Starting where Step I left off: Trending for the future of Walnut College Exercise: Trending		8:30 AM - 10:00 AM
1	BREAK			10:00 AM - 10:15 AM
1	GAP ANALYSIS	Exercise: Gap Analysis		10:15 AM - 10:45AM
1	VISION/STRATEGIC ISSUES	Exercise: Visioning for Walnut by using the gap analysis		10:45 AM - 11:15 AM
1	STRATEGIC ISSUES	Exercise: Identify strategic issues using the gap analysis and vision		11:15 AM - 12:00 PM
1	LUNCH			12:00 PM - 1:00 PM
1	REFLECTION & PLANNING STRATEGIC DECISIONS & STRATEGIES	What role does reflection play in planning? Exercise: TOWS Exercise: Creating strategies for strategic issues defined for Walnut College		1:00 PM - 2:00 PM
1	BREAK			2:00 PM - 2:15 PM
1	ACTION, MEASUREMENT, EVALUATION & REFINEMENT	Aligning actions and reporting to strategies Exercise: Measurement & evaluation at Walnut College		2:15 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



SCUP PLANNING INSTITUTE

STEP II DAY 2



FOCUSED KNOWLEDGE FOR
INTEGRATED PLANNING PROCESSES

Day	Topic	Notes	Location	Time
2	QUESTION SESSION	Facilitated Q&A to clarify questions and issues from the previous day		8:00 AM - 8:10 AM
2	CHARACTERISTICS OF INTEGRATED PLANNING	Presentation of a model of integrated planning. Overview of the taxonomy of higher education planning		8:10 AM - 8:30 AM
2	LINKING STRATEGIC PLANNING WITH ORGANIZATIONAL PLANNING	Presentation of models of strategic and organizational planning		8:30 AM - 10:00 AM
2	BREAK			10:00 AM - 10:15 AM
2	ACADEMICS, FINANCES, FACILITIES INTEGRATED, STRATEGIC, ALIGNED	Alignment of planning processes across an institution. Academic, Financial, and Space planning overview. Exercise: "What should we teach and why?"		10:15 AM - 10:45 AM
2	EXECUTION OF STRATEGY	What does it mean to execute a strategy?		10:45 AM - 11:15 AM
2	BUDGETS	Exercise: creating a process to enable Walnut College to allocate funds based on planning priorities		11:15 AM - 12:00 PM
2	LUNCH			12:00 PM - 1:00 PM
2	STRATEGY TACTICAL PLANNING & EXECUTION	Exercise: setting goals for Walnut College		1:00 PM - 2:00 PM
2	BREAK			2:00 PM - 2:15 PM
2	OPERATIONAL PLANS	Exercise: Implementation steps		2:15 PM - 4:45 PM
2	WRAP-UP	Facilitated Q&A concerning real case problems from participants based on the day's material		4:45 PM - 5:00 PM