How to Support Successful Institutional Planning

Succeeding at integrated planning at colleges and universities is a challenge. Many planning models do not work in higher education because they are not designed for higher education. Planning processes designed for corporations or non-profits do not account for the complex environment of higher education nor its unique challenges.

Many institutions struggle to leverage planning into lasting change because they create plans in a vacuum. They do not grasp the institution’s strategic issues or create a sound value proposition. They are not prepared for good planning.

In June 2015, the society, with assistance from Baker Strategy Group, emailed a survey to more than 94,000 higher education professionals in the United States; 2,285 responses were received. The survey asked about planning practices on the respondent’s campuses and their familiarity with SCUP. Results showed a dissatisfaction with planning processes on campuses. In addition, when asked how to improve planning on campus, results showed seven factors that may improve planning on campus.

Is it time for your and your team to learn more about integrated planning? Contact our Planning Institute team to help get your campus planning together. scup.org/PI planning.institute@scup.org

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Seven Factors that Set a Framework for Effective Planning

1. Develop the value of planning
   Give planning the proper emphasis as an institutional priority.

2. Build planning capacity
   Develop durable planning practices, shared expectations for planning across the institution, and training people to plan.

3. Agree on priorities
   Decide what goals everyone will pursue, link unit work to institutional priorities, stay disciplined about planned priorities.

4. Integrate plans across campus boundaries
   Broad institutional perspective, bridge campus units by developing shared initiatives, leveraging scarce resources, or cultivating informed trade-offs, understanding how one unit affects another.

5. Pursue planning-related professional learning
   Training all planners across campus.

6. Be agile
   As you develop a planning culture, it will be easier for you to be agile.

7. Manage change
   Integrated planning makes it easier for you to anticipate change.

Five Strategies for Developing a Culture of Integrated Planning

1. Balance creativity and discipline via distributed leadership.

2. Connect choices to underlying values.

3. Develop planners across the institution.

4. Celebrate the expert-generalist.

5. Bridge pragmatism and ambition for sound implementation.

Source: Young and Baker, 2016.