Disruption is Upon Us: Integrated Planning is Your Superpower

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Learning Outcomes

Join a movement to mature integrated planning as an indispensable norm.

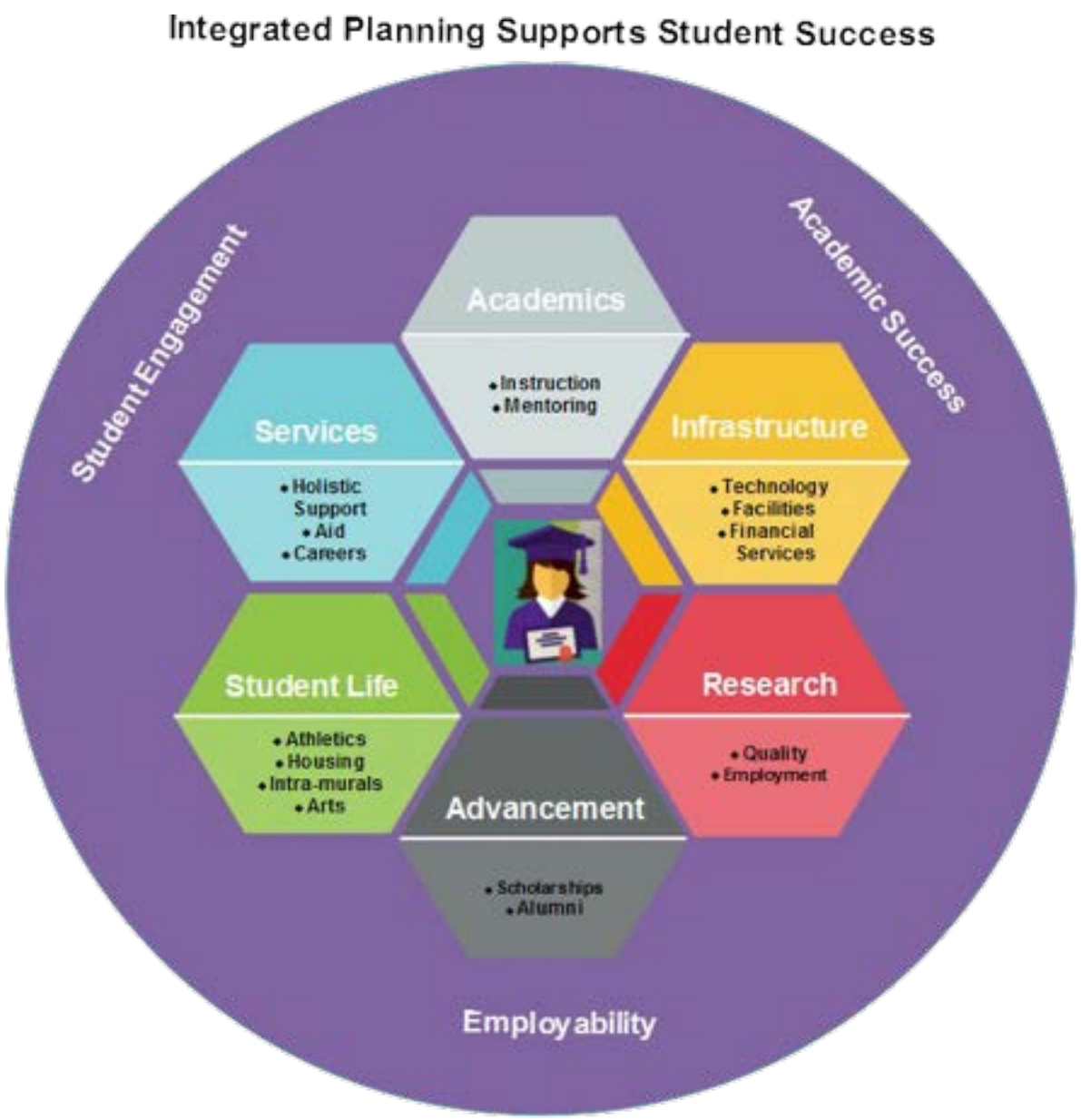
Spark conversations and breed familiarity with the practices and outcomes of integrated planning.

Apply a value proposition for integrated planning to one's institution.

Clearly communicate the need for the evolution of integrated planning.

Today's Activities

- **Opening:** There are enormous challenges, some say disruption, in higher education and there is value for integrating planning. But the **understanding and sustainable practice** of integrated planning is elusive. How can integrated planning drive student success and institutional thriving?
- **Framing:** What are examples of these **challenges and barriers to change**? How might integrated planning be used to address the most serious challenges faced by our sector?
- **Anchoring:** Discuss how we can **evolve the concept of integrated planning** so it becomes something **managed creatively over time** and supports **student success, collaborative governance, institutional effectiveness and accreditation.**
- **Plotting:** Discuss how we can **move integrated planning** from a process to a **cultural norm.**
- **Exploring:** Engage in a **series of exercises** to help demonstrate key aspects of integrated planning.



Integrated Planning

Advances Student Success and Institutional Thriving

Planning in a Time of Disruption

What Does Disruption Look Like in Higher Education?

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On Disruption: Clayton Christensen How to Manage the Disruption of Higher Education

On the next two slides are four observations regarding the context of higher education in the US.

Let's take a few moments to review and discuss his observations.

Summary is based on the author's presentation at the Forum for the Future of Higher Education's 2009 Aspen Symposium

1. American higher education—albeit the envy of the world—is ***mired in an expensive and outdated delivery model***, one that prevents huge swaths of our population from taking advantage of the knowledge and expertise harbored by our nation's colleges and universities.

2. Simply put, higher education's prevailing business model is a ***mis-match with the current educational needs*** of our population. It is time to rethink and disrupt that model.

3. Disruptive innovations reduce costs dramatically by ***providing simpler, less expensive products that are good enough*** for the job at hand. The overwhelming concern for costs that prevails during recessions spurs and accelerates disruptive innovation.

4. Despite the explosive growth of online learning, higher education has trapped many disruption-enabling technologies in complex, high-cost institutions that conflate two and sometimes all three business models under one roof. ***Business model innovation*** will help free disruptive technologies and make higher education more affordable, accessible and effective.

Disruption…. or Not?

- Has Christensen accurately captured disruption in higher education?
- What are the forces impacting higher education in your region and beyond?
- How will your institution respond?
- In your opinion, what are two or three of the most compelling problems facing higher education in your region?

Responding to Disruption

The Case for Integrated Planning

Managing Higher Ed Disruption Through Planning

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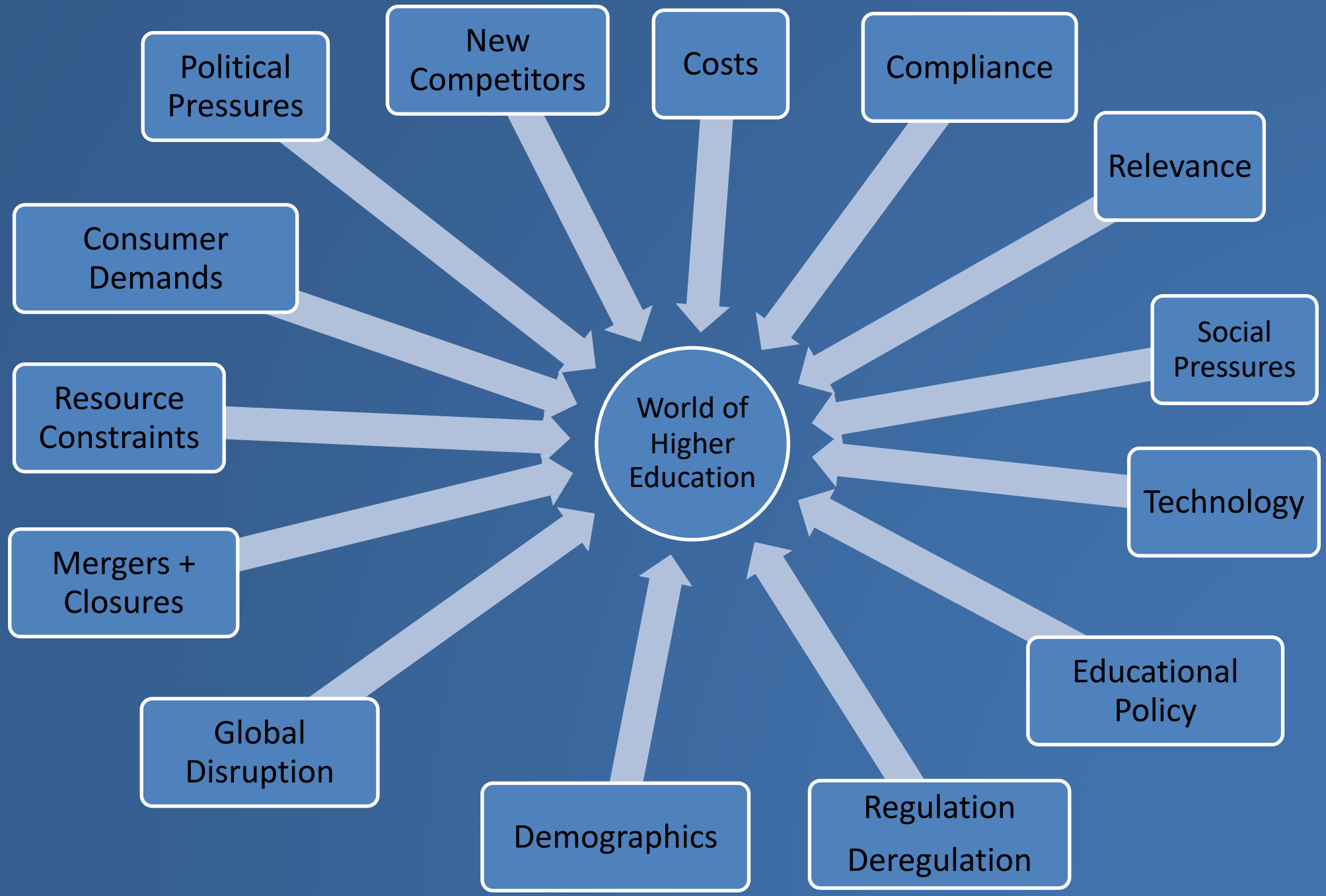
The Case for Integrated Planning

- In our opinion, the launching point for creating long-term capability to manage change starts with building ***durable cross-functional relationships*** across the units of an institution.
- These strong on-campus partnerships ***create a culture*** that embraces the integrated planning requirements for sustaining the execution of the integrated plan, namely from strategic vision to operational tactics for organizational viability.
- Administration, faculty, students, employers and even the institution's local community all have a stake in the success of a campus and must be included in the planning processes that ultimately ***creates a durable culture to manage change***.

The Case for Integrated Planning

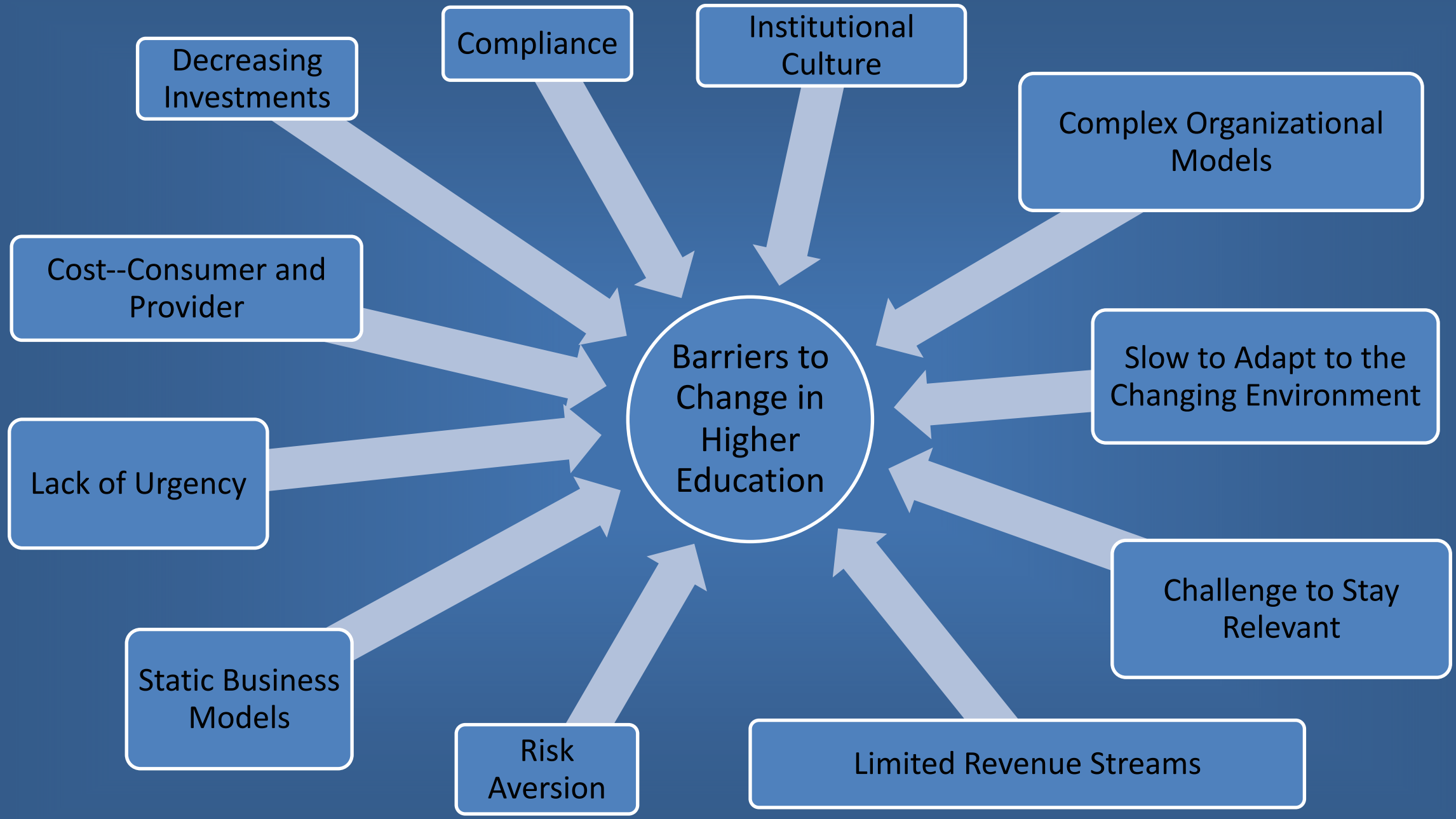
- The ability to address the non-stop emergence of new trends on a campus through a responsive planning process is critical for all institutions, regardless of size or current financial standing.
- In the absence of good planning, even the largest of endowments can suffer quickly if the campus culture is reactive to change.
- Build strong relationships anchored against the desire to support the greater good of an institution, and one will be ready for whatever trends come his or her way.

What Forces Shape the Context of Higher Education?


Political Pressures
New Competitors
Costs
Compliance
Relevance
Consumer Demands
Social Pressures
Resource Constraints
World of Higher Education
Technology
Mergers + Closures
Educational Policy
Global Disruption
Demographics
Regulation
Deregulation

Forces of Change

What Forces Inhibit Change in Higher Education?


Barriers to Change in Higher Education
Decreasing Investments
Compliance
Institutional Culture
Complex Organizational Models
Cost--Consumer and Provider
Slow to Adapt to the Changing Environment
Lack of Urgency
Challenge to Stay Relevant
Static Business Models
Risk Aversion
Limited Revenue Streams

Forces of Change

Why Integrated Planning?

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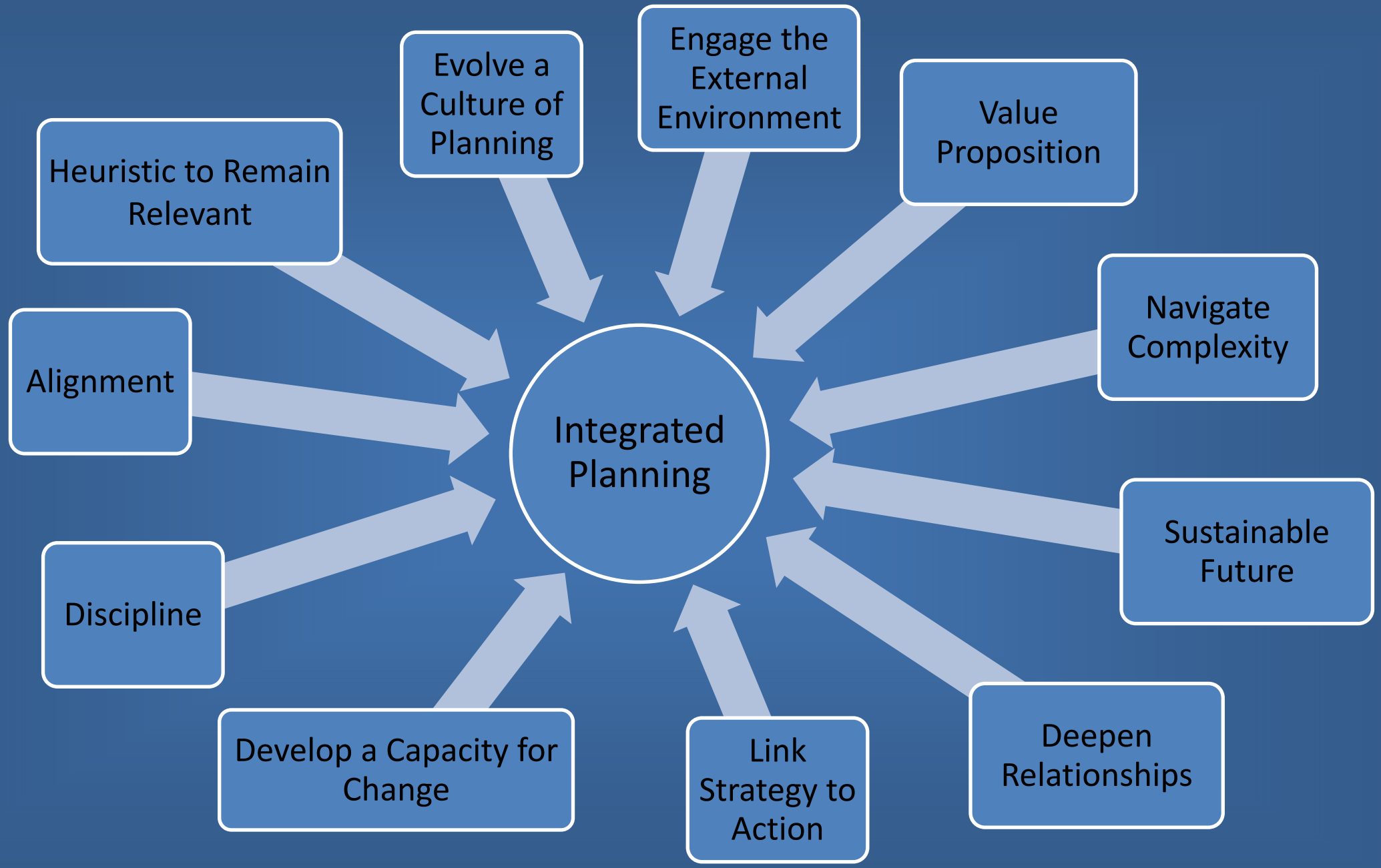
Integrated Planning
Heuristic to Remain Relevant
Evolve a Culture of Planning
Engage the External Environment
Value Proposition
Navigate Complexity
Alignment
Discipline
Develop a Capacity for Change
Link Strategy to Action
Deepen Relationships
Sustainable Future

Responding to Disruption

The Purpose of Integrated Planning

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Why Integrated Planning?

- Customary Organizational Practice in Higher Education
- Driven by Mission
- Informed by Data

Integrated Planning

Definition

Discussion

Distinction

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What Is Integrated Planning?

Integrated planning is a ***sustainable*** approach to planning that builds ***relationships***, ***aligns*** the organization, and emphasizes preparedness for ***change***.

Integrated planning engages all sectors of the academy—academic affairs, student affairs, business and finance, campus planning, human resources, information technology, communications, and advancement. It involves all stakeholders—faculty, students, staff, alumni, and external partners.

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Integrated Planning
Strategic Planning, Operational Planning

- ***Integrated Planning:*** "A sustainable approach to planning that builds relationships, aligns the organization, and emphasizes preparedness for change.
- ***Strategic Planning:*** "A deliberate, disciplined effort to produce fundamental decisions and actions that shape and guide *what an institution is, what it does, and why it does it.* Strategic planning is an approach to dealing with the serious challenges that an institution, its stakeholders, partners, and communities face."
- ***Operational Planning:*** "An instrument for *implementing* a strategic plan on a unit level. Operational planning is often contingent on, and driven by, *annual budget cycles*."

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- Society for College and University Planning

What is Distinctive about Integrated Planning?

Institutions have problems that integrated planning can solve.

- ***Collaborative:*** Engages all stakeholders
- ***Aligned:*** Across the institution
- ***Sustainable:*** Build a culture of planning
- ***Change-ready:*** Poised to respond to a volatile environment

For Discussion

- Integrated planning is highly variable depending on local conditions. Given that there's is no one-size fits all framework for diverse institutional types:
  - How does integrated planning work, or not work, in your estimation?
  - What actions might be common, essential, and/or transferable?

- How do we shift emphasis from 'building plans' to the 'building an integrated planning culture'?
  - What would be required and who would need to be involved?

Impact of Integrated Planning

- Accreditation
- Collaborative Governance
- Alignment
- Sustainable
- Change-ready

Accreditation

Accreditation

- All of the regional institutional accreditors identify ***integrated planning, by name,*** as a customary institutional practice and an expectation for accreditation.
- Specialty accreditors either directly or indirectly reference ***integrated planning*** as a customary institutional practice necessary for accreditation.

Collaborative Governance

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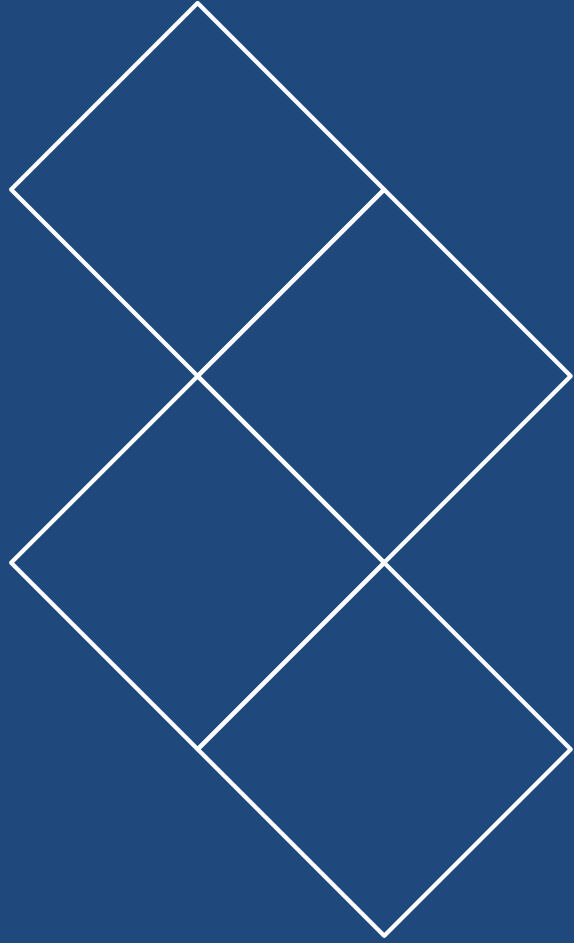
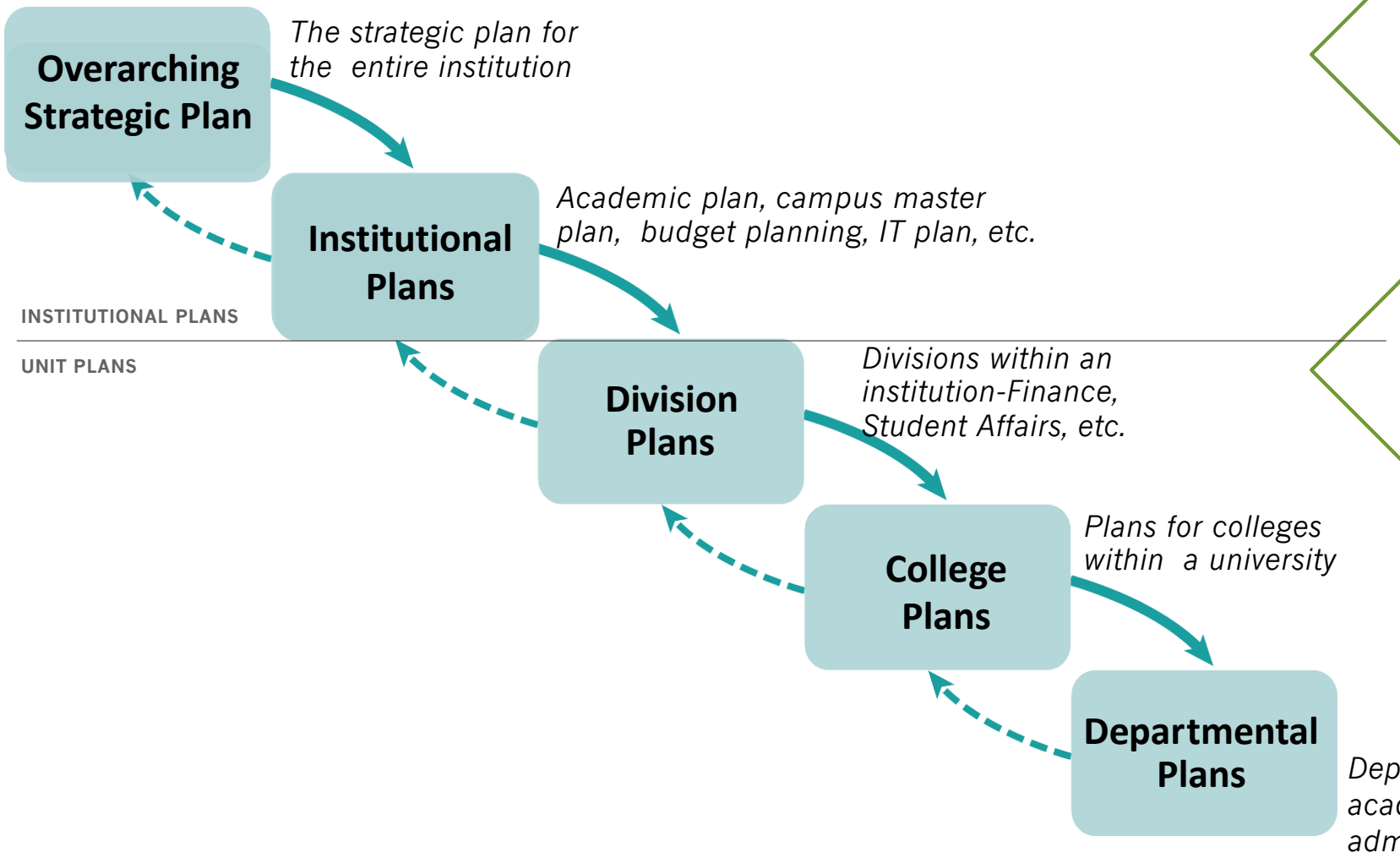
Collaborative Governance A Necessary Prerequisite for Integrated Planning

- Fundamentally a human activity
- Supports cross-functional relationships
- Institutional culture matters
- Leverage existing governance structures
- Fosters a culture of shared purpose

Alignment




Overarching Strategic Plan
The strategic plan for the entire institution
Institutional Plans
Academic plan, campus master plan, budget planning, IT plan, etc.
INSTITUTIONAL PLANS
UNIT PLANS
Division Plans
Divisions within an institution-Finance, Student Affairs, etc.
College Plans
Plans for colleges within a university
Departmental Plans
Departments, academic areas, administrative units

Aligning the Institution Up, Down, and Sideways

- Alignment Assessment---A snapshot across the institution
- Academic Planning Alignment---How does the academic plan set a vision for institutional progress?

- Handouts + Discussion

Sustaining Integrated Planning

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Organizing for Integrated Planning

- A Culture of Planning
- Readiness for Change
- Planning Maturity
- Are you Aligned?

Integrated Planning Culture

- Build a Plan/Integrated Planning Culture
- Integrated Planning as a Cultural Norm
- Handout + Discussion

Leading Change + Shifting Our Focus

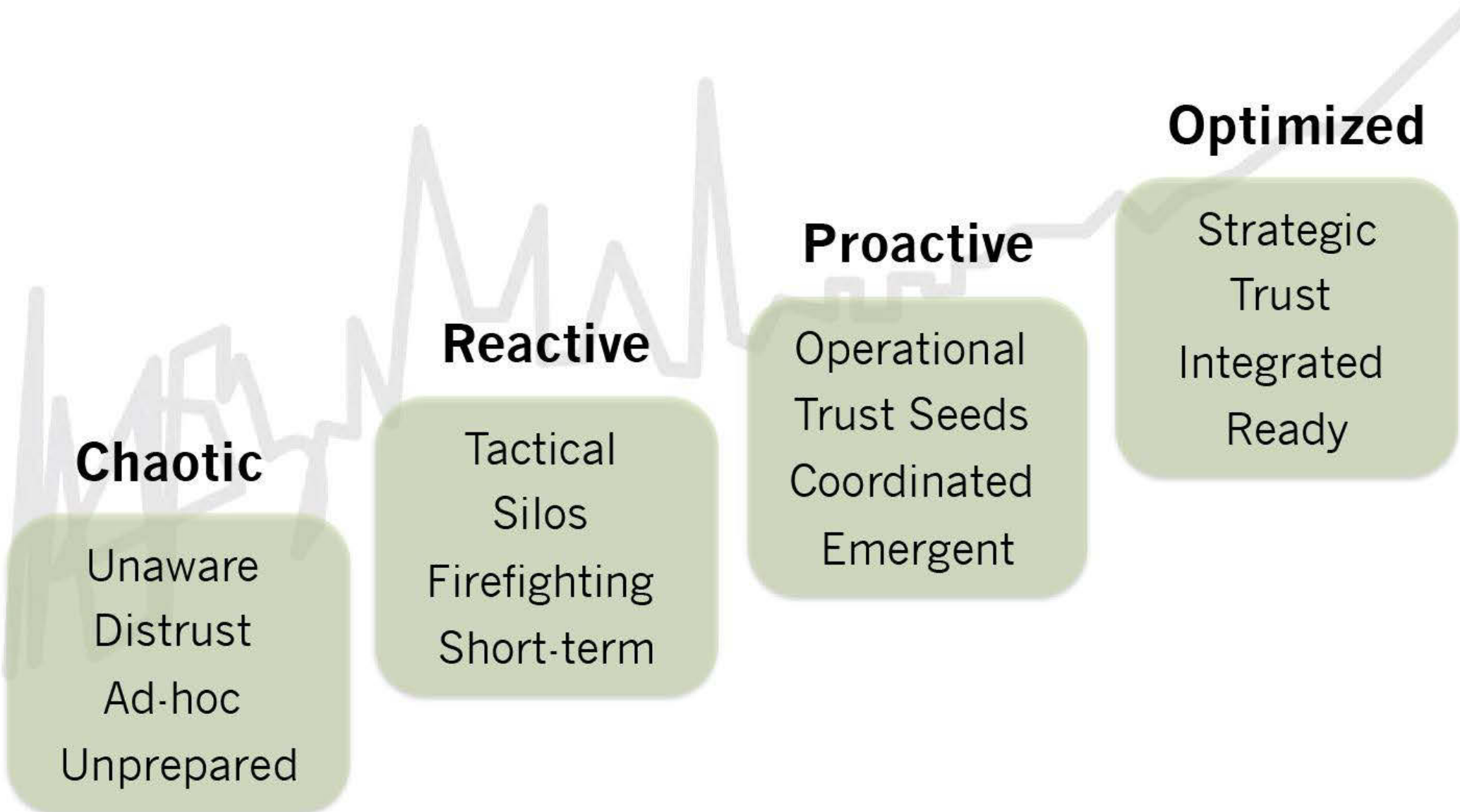
Build-a-plan culture		Integrated planning culture
Produce	→	Execute
Episodic	→	Sustained
Insular	→	Relational
Process	→	Cultural Norm

Integrated Planning Maturity

Stages of Planning Maturity

Handout + Discussion

Integrated Planning Maturity Model

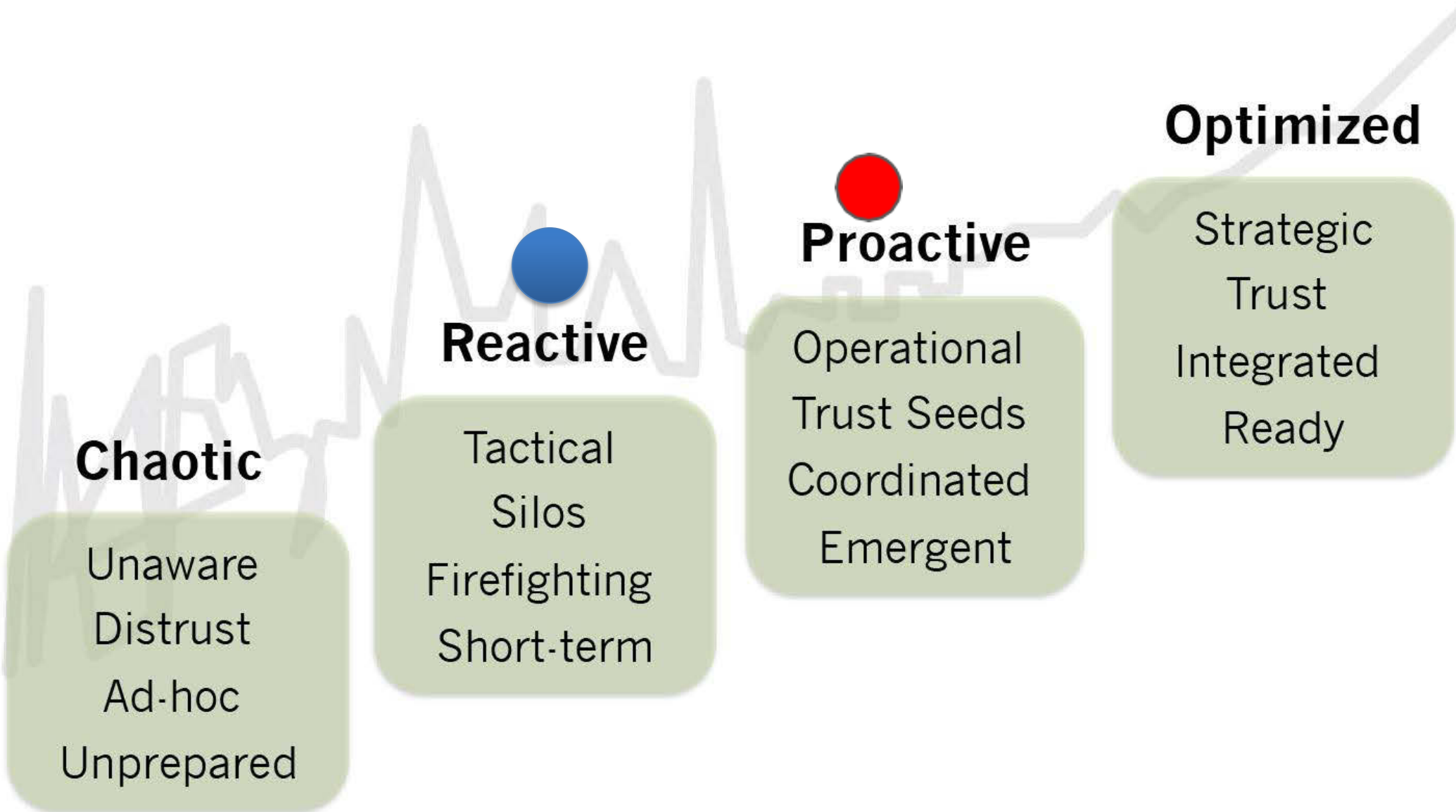


Where is Your Institution on the Planning Spectrum?

Take a moment and consider your planning experience at your institution.

What stage would you assign for your institution?

Integrated Planning Maturity Model



Is Your Institution Change Ready?

Change Readiness Survey + Discussion

Toward a Culture of Planning

What is the state of planning at your institution?

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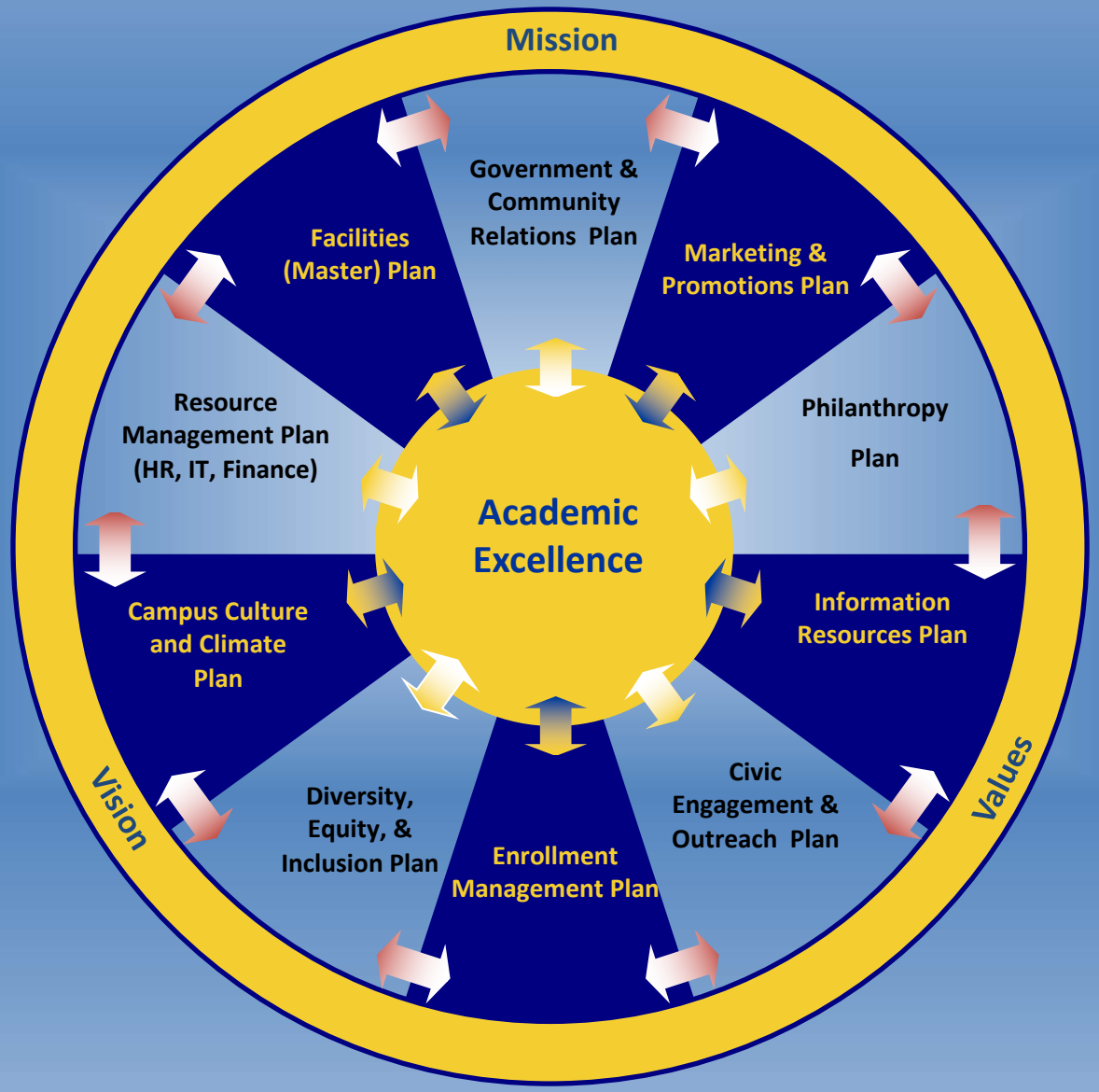
Integrated Planning and Institutional Alignment

- The Challenge of Integrated Planning
- Vertical Alignment + Horizontal Alignment

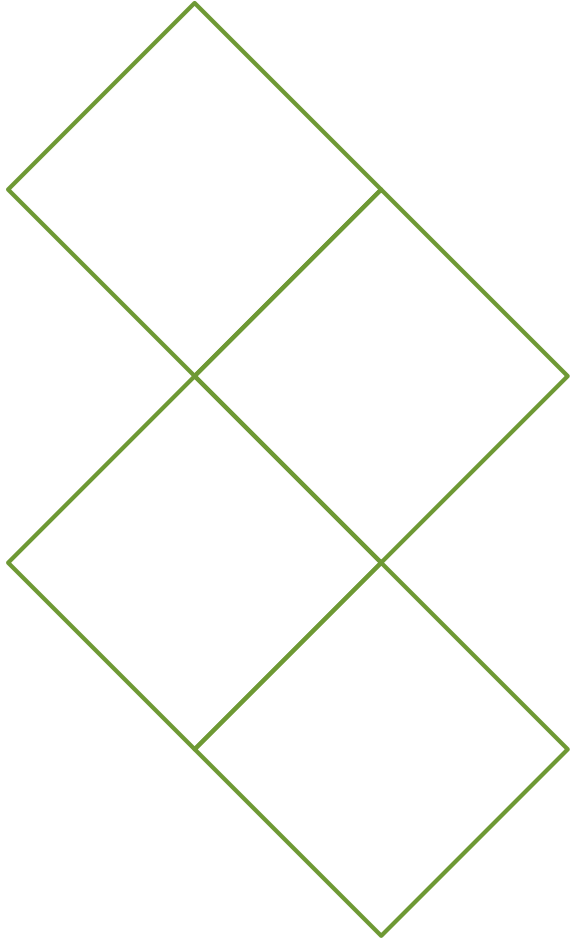
Handouts + Discussion

Integrated Strategic Planning



Are you "Implementation Ready?"

Implementation Readiness Survey



Report: Successful Planning

Report on Features of Successful Planning

Features of Successful Integrated Planning Efforts

- Visible leadership at the presidential and executive levels;
- Linked to budgets with budget flexibility for change;
- Local champions, but broadly based involvement;
- Ongoing evaluation/changes to the plan;
- Empowerment of stakeholders;
- Reaches across silos; strategic and institutional;
- Communication -- creates the conditions for success (talked about); regular reporting on progress; strategic and linked to ‘brand’, and;
- Adapted to the university, not imported.

Things you can do.

- Balance creativity and discipline via distributed leadership
- Connect choices to underlying values
- Develop planning competence across the institution
- Identify and celebrate the expert-generalist
- Bridge pragmatism and ambition for sound implementation

A Final Thought
Remember our Purpose

- **Act with compassion**
- **Lead with integrity**
- **Live for justice**