Charge to the Planning Committee

A planning committee is a formal group convened to develop a plan. The team should include representatives from stakeholder groups.

The charge to the planning committee includes the following elements at a minimum:
- Scope of responsibility of the committee
- Size and composition of the committee
- Expectations of the committee
- Length of commitment

Guiding Principles

The guiding principles for a strategic planning process describe measures the planning team would follow during the planning process. Examples include transparency, inclusivity, collaboration, and being data informed.

Planning Process Structure

The planning process structure defines the levels of leadership, oversight, and support of the process. An example is as follows:

Leadership
- Vice President of a division or college Dean

Oversight
- Associate/Assistant Vice President or Dean

Guide, Facilitate, and Support

- The chair of the planning team would guide, facilitate, and support the planning process
- The planning team would be diverse and inclusive including representatives from stakeholder groups across appropriate areas from the University community

Planning Activity Overview

Information Gathering Stage

The information gathering stage builds understanding of the current state of affairs and the direction a community feels it should be moving. The information gathered informs the planning process and is useful in a SOAR or SWOT exercise. Activities may vary depending on the level of the unit creating the plan (division, unit, or sub-unit). Suggested information gathering activities include an environmental scan, online survey, open forums, and focused discussions.

Environmental Scan

An environmental scan is the exploration and analysis of internal and external factors affecting an institution. Typically, a scan will focus on five environmental sectors; political, economic, social & demographic, technical, and educational. It provides a framework for analyzing the potential

direction in a market area. The scope of the analysis includes national, state, and local trends, as necessary depending on the sector.

Survey
A survey gathers information to further the planning team's understanding of stakeholders' views of the current state of affairs and strategic areas of focus. Analysis of the survey responses should be incorporated into the SOAR or SWOT analysis.

Open Forums
Forums provide a public meeting place for open discussions to gather information to further the planning team's understanding of stakeholders' views of the current state of affairs and strategic areas of focus. Analysis of the open forum responses should be incorporated into the SOAR or SWOT analysis.

Focused Discussions
Focused discussions are meetings with targeted groups such as standing committees to gather information to further the planning teams understanding of stakeholders' views of the current state of affairs and strategic areas of focus. Analysis of the focused discussion responses should be incorporated into the SOAR or SWOT analysis.

SOAR or SWOT Analysis
A SOAR (Strengths, Opportunities, Aspirations, and Results) or SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis follows the information gathering stage. The analysis guides the creation of strategic directions that lead to plan objectives and actions.

Draft Plan
Drafted strategic plan components include mission and vision statements, core values, strategic directions/goals, objectives, and actions. The draft plan should be shared with stakeholders for review and revisions to the plan should incorporate the feedback as appropriate.

Timeline
Establishing a timeline with short and long targets for activities to be completed keeps the planning process on track. Account for each step in the process and provide sufficient time for analysis of information gathering and analysis.