

Strategic Planning: A Model for Collaboration

Valencia Community College
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What is planning?

1. Thinking about the future.
2. Organizing those thoughts.
3. Writing them down.
4. Making mutual commitments to act to **improve results**.

“We must recognize that our efforts to anticipate the future help to shape it.”

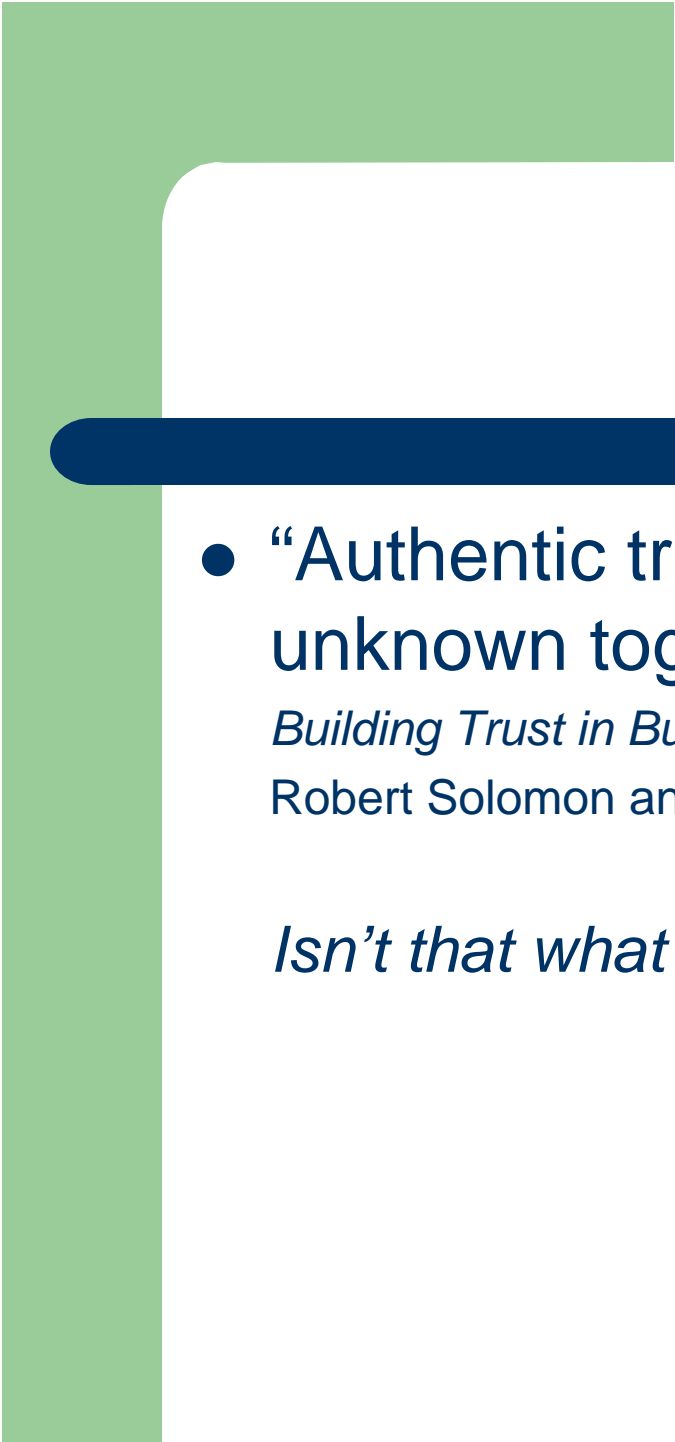

John Sawhill

What can planning do for us?

- **Build trust.** One of the key benefits of strategic planning is its role in building trust, *if structured toward that end.*
- Through communication, sharing of data and information, shared decision making, and shared commitment to make a contribution to society, we build trust within the college.

Trust ...

- Is a matter of making and keeping commitments.
- Involves an awareness of risks and vulnerabilities, and requires a keen assessment of the situation and the stakes.
- Has as its most important features conversation, communication, and negotiation, which are often ignored.

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- “Authentic trust involves going into the unknown together.”

Building Trust in Business, Politics, Relationships, and Life

Robert Solomon and Fernando Flores

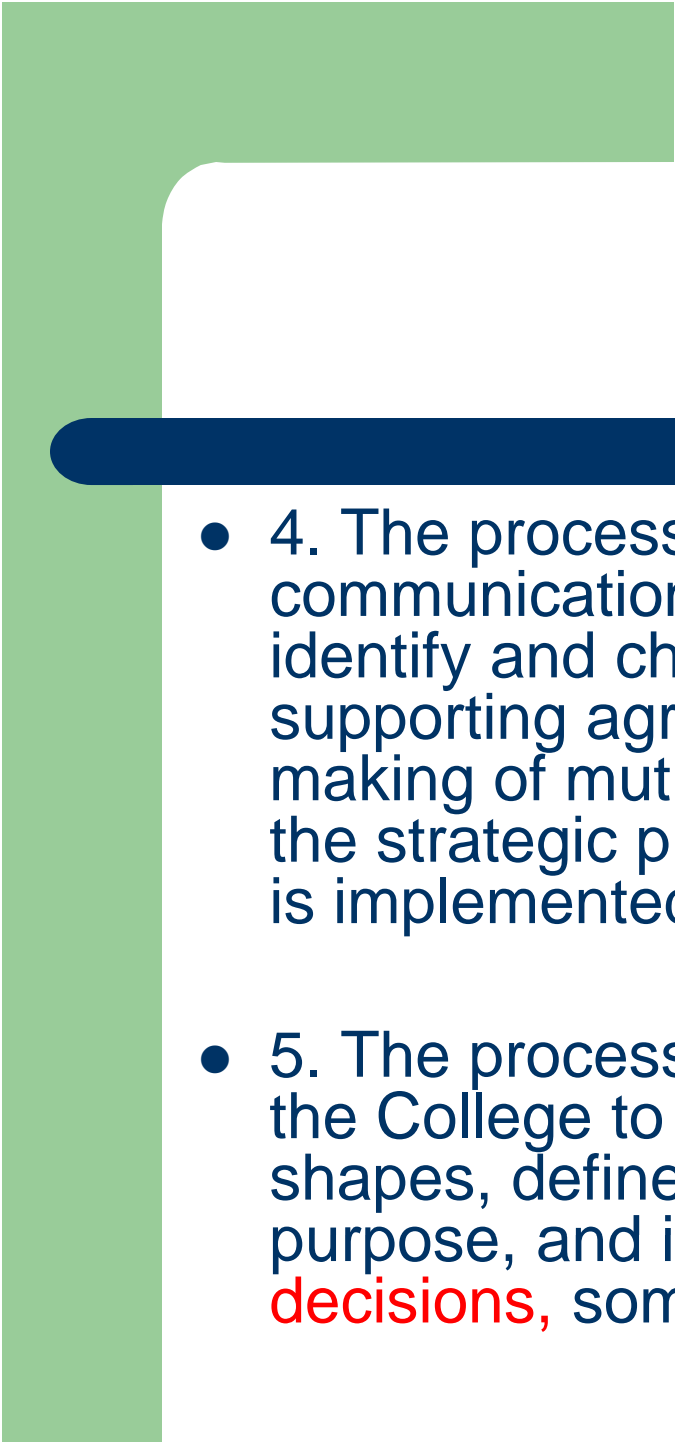

Isn't that what planning is all about?

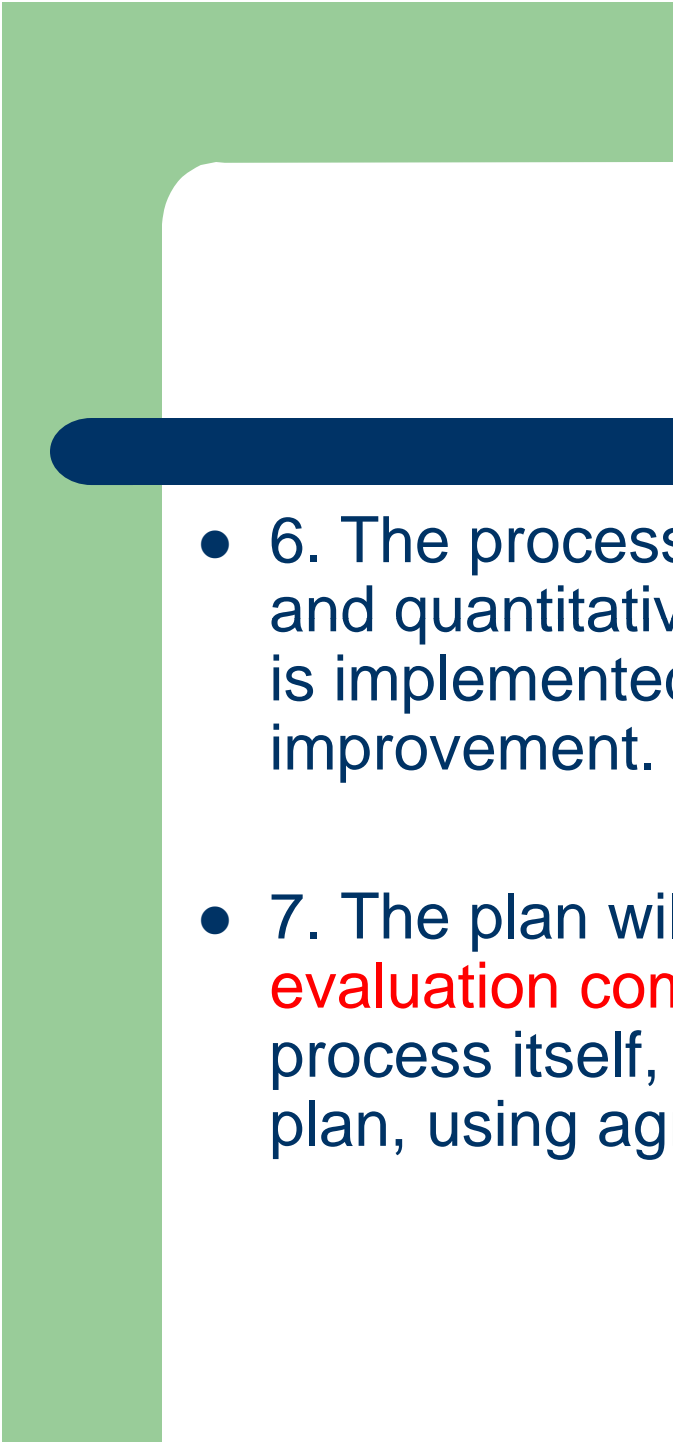

Design Principles

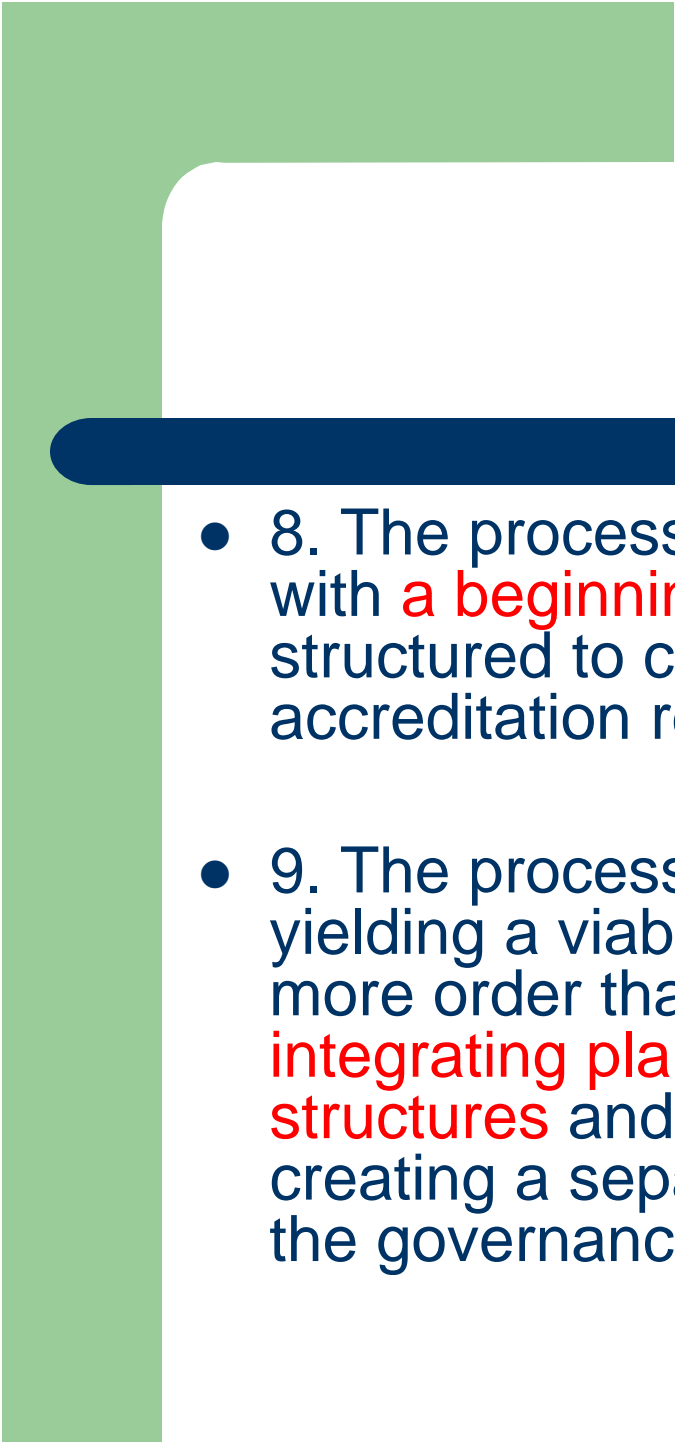

- Valencia established design principles for the strategic planning process against which we can test it, change it as needed, and evaluate it.
- The principles are contained in our “Plan to Plan.”

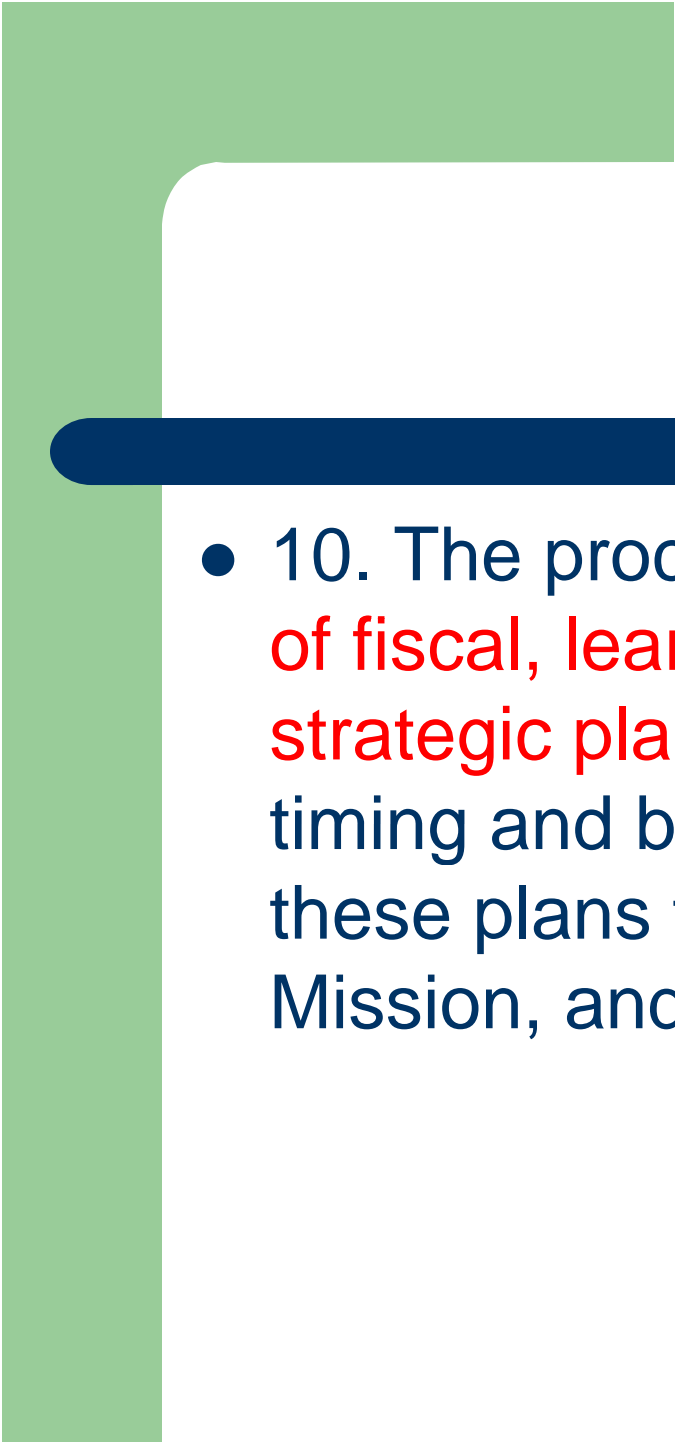

Valencia's design principles:

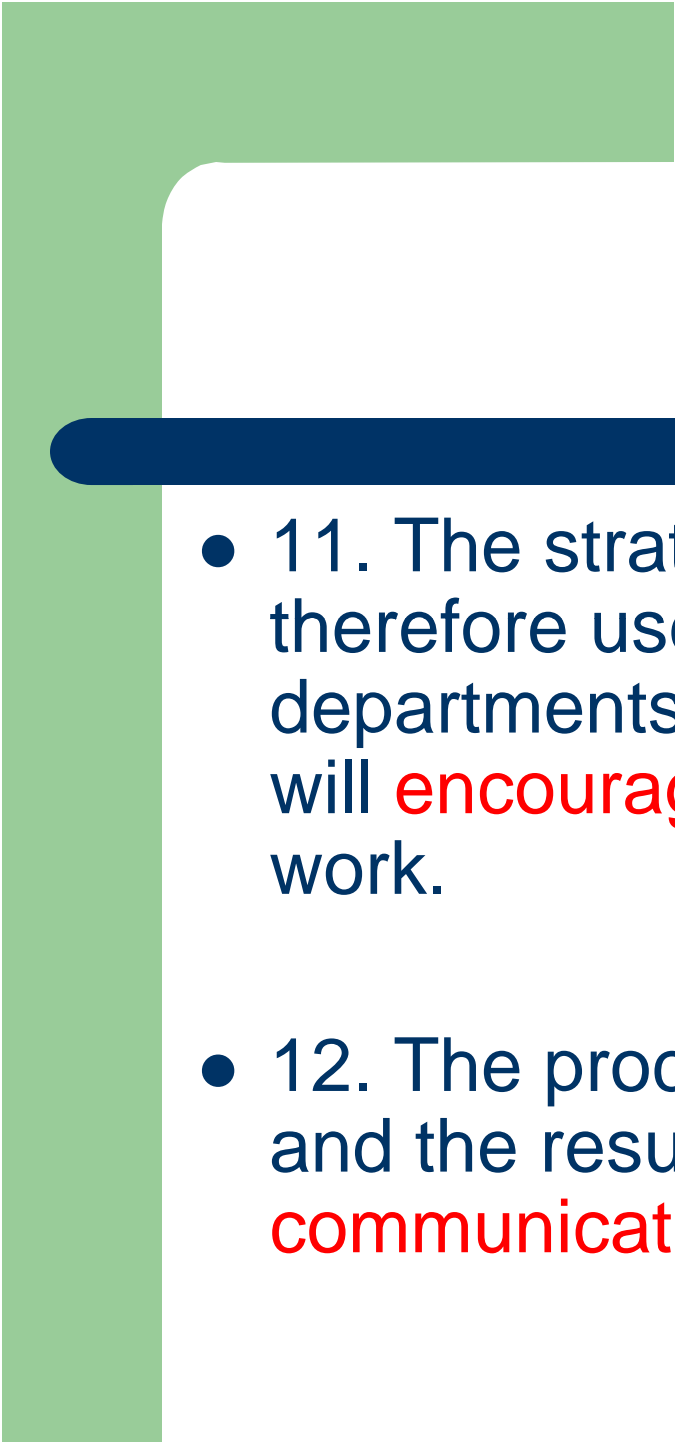

- 1. The planning process and the plan that it yields will be **learning-centered**.
- 2. The process will be **strategic by impacting the results the college aims to provide to society and to students** as they progress in their programs of learning.
- 3. The planning process will be **collaborative** by operating within our shared governance structure that ensures broad-based participation and by providing a means for stakeholder groups to be heard and to influence the plan.

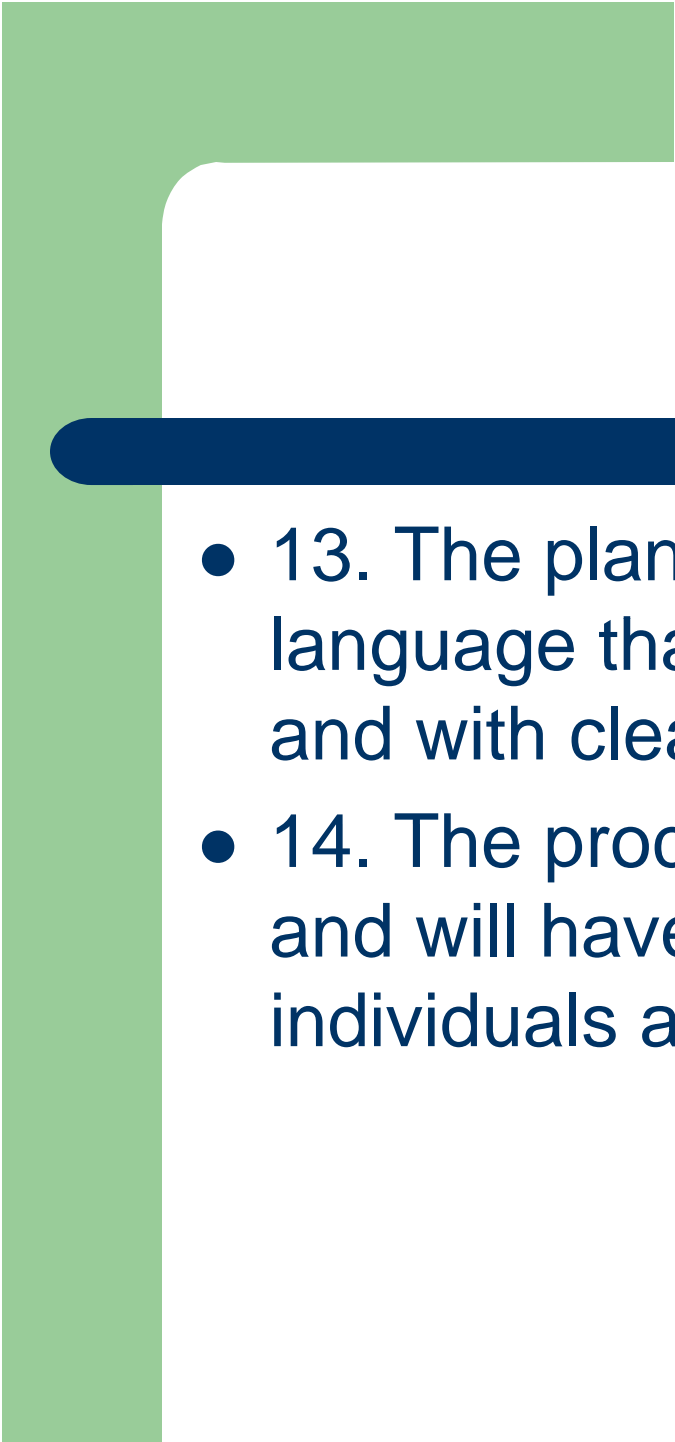

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- 4. The process will **build trust** through effective communication and negotiation, by making it safe to identify and challenge assumptions, and by supporting agreements on shared values and the making of mutual commitments that are the basis for the strategic plan, and that are honored as the plan is implemented.
 - 5. The process will be meaningful in that it will help the College to establish a vision of the future that shapes, defines, and gives meaning to its strategic purpose, and in that it will help to **shape strategic decisions**, some of which are identified in advance.

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- 6. The process will be **data-driven**, using qualitative and quantitative data, routinely reviewed as the plan is implemented, with the aim of continuous improvement.
 - 7. The plan will include **formative and summative evaluation components** that evaluate the planning process itself, as well as the implementation of the plan, using agreed upon performance indicators.

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- 8. The process will have a clear cycle of activities, with **a beginning and an end**, and timed and structured to coordinate well with SACS accreditation requirements.
 - 9. The process will be **as simple as possible** while yielding a viable plan, avoiding the trap of imposing more order than the College can tolerate, and **integrating planning into permanent governing structures** and collegewide meetings, rather than creating a separate set of activities removed from the governance and life of the College.

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- 10. The process will support the integration of fiscal, learning, and facilities plans with the strategic plan of the college, through careful timing and by clearly connecting each of these plans to the College's revised Vision, Mission, and Values.

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- 11. The strategic plan will be useful to and therefore used by councils, campuses and departments as they prepare their plans, and will **encourage a future orientation** to their work.
 - 12. The process, its language, its products, and the results of the plan will be **communicated to all employees** internally.

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- 13. The plan will be **expressed clearly**, with language that is understood by stakeholders and with clear means of measuring progress.
 - 14. The process will be truly comprehensive, and will have **clearly assigned roles** for individuals and groups, including students.

Collaboration

- We will ask the panel at this point to focus on how we built collaborative processes into the planning process, and why.

First, why collaborate?

- Collaboration supports a higher quality of planning and thus a higher level of results.
- Collaboration leads to a higher level of commitment to implement the plan.
- Collaboration builds trust, which supports us as we face the changes that the future inevitably brings.

How do we collaborate?

- Through careful planning and scheduling of the planning process, guided by an organizational chart and a timeline.
- By modeling collaboration among the planning facilitators, working together and trusting each other.
- By resisting any backward glances toward a paternalistic, top down model, in which we passively wait to be lead by others.
- By ensuring that leaders honor the collaborative work.
- By acting as full citizens of our organization, preparing to participate, and participating fully.

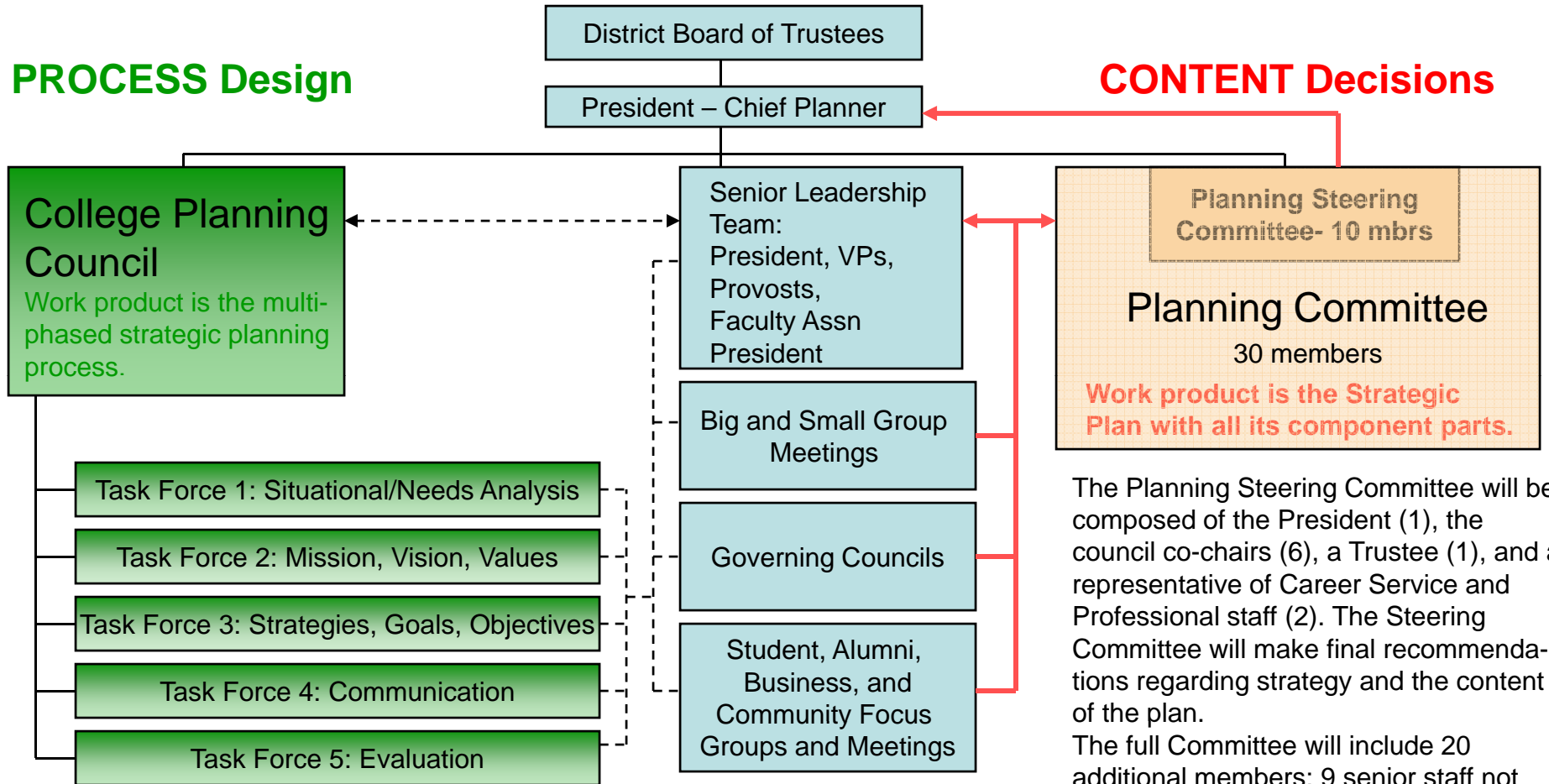
Collaborative planning requires clear assignments and scheduling

- An organizational chart depicts the assignments made to various groups, and a timeline projects completion, providing for broad-based participation.
- A schedule for each step of the process enables all to know where the college is in the process and when they have opportunities to participate
- A schedule for two projected planning cycles beyond the current cycle is helpful so that planning is expected and routine.

Organizational Chart for Strategic Planning

PROCESS Design

CONTENT Decisions



The College Planning Council will work closely with and consult the Senior Leadership Team as it designs and conducts the planning process. The CPC will charge Task Forces with designing and carrying out the phases of the process, ensuring that decisions are made in a collaborative fashion, using Big and Small Group meetings, consulting with key constituencies, and working through the governing councils and the Senior Leadership Team.

The Planning Steering Committee will be composed of the President (1), the council co-chairs (6), a Trustee (1), and a representative of Career Service and Professional staff (2). The Steering Committee will make final recommendations regarding strategy and the content of the plan.

The full Committee will include 20 additional members: 9 senior staff not serving as co-chairs, 2 deans, 3 additional faculty, 3 additional professional staff, and 3 additional career service staff. This group of 30 will review work products, note any additional information or consultation needed, and make needed adjustments to ensure a clear, consistent, and logical document.

College Planning Council

- Provides perspective of constituents regarding process and the information that should be used to inform the planning process
- Organizes and operates the process through which the stakeholders inform the decisions that will be made
- Instructs the college about the process

College Planning Committee

- Reviews/approves processes, participants, and schedules
- Prepares and/or reviews and approves the components of the plan and the final plan
- Identifies specific decisions to be informed by the plan
- Teaches the completed plan to stakeholders

Task Forces and Teams

- Address specific phases and work products of the process
- Provide opportunities for broader, representative involvement
- Can include community members
- Bring expertise to the develop of the components of the plan

Opportunities to participate

- Service on planning groups
- Attending small and large group discussions of planning documents
- Participating in a “Big Meeting”
- Submitting individual comments via a web site and/or anonymously on paper
- Review of multiple iterations of documents
- Make clear when and who considered comments received, noting the collaboration that yielded each document.

Valencia's Task Forces

- Valencia used five planning task forces during 2006-08, and those involved in leading these groups will briefly share their charge, membership, and work products.
- The members were volunteers, with faculty, staff and administrators participating on all task forces.

Data and Situational/Needs Analysis Task Force – Susan Kelley

- Developed a taxonomy for data analysis
- Collaborated in the review of over 60 sets of data
- Named key points derived from the data review
- Wrote a situational/needs analysis on which the strategic plan was subsequently based.
- Invited collaborative review by the college and community stakeholders.

Vision, Values, and Mission Task Force – David Rogers

- Reviewed existing statements of vision, values, and mission, and of the process of creating them in 2000
- Designed collegewide opportunity to comment on these statements on Learning Day
- Developed revised statements based on input from Learning Day, circulated them for comment, and presented a final recommendation, which was subsequently adopted by the Trustees in 2007.

Communications Task Force – Karen Blondeau

- Identified stakeholder groups
- Developed methods of communicating with the members of these groups
- Assisted other task forces in soliciting feedback on their work products
- Ensured that everyone was aware of the opportunities to be involved.
- Continuing through Fall 2008 to share the new plan with the College and our community.

Goals, Strategies, and Objectives Task Force – Suzette Dohany

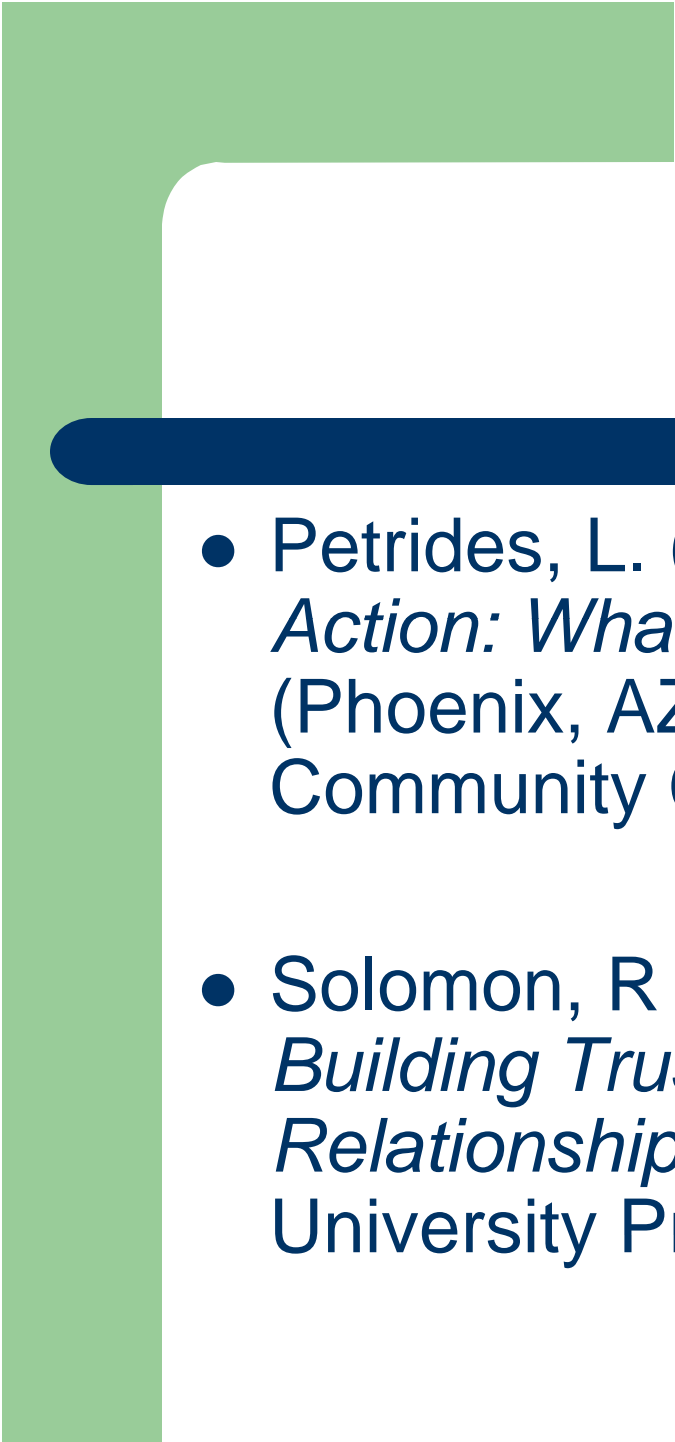

- Based on input from the Big Meeting, drafted strategic goals and named strategic issues that must be resolved if we are to achieve our goals
- Coordinated the work of four Goal Teams in Fall 2007, which developed measurable objectives for each of the goals
- Coordinated work to reduce overlap and address any missing pieces

Evaluation Task Force – Susan Kelley

- Designed an evaluation plan for the planning process itself, including a means of assessing the extent to which it was collaborative and aligned with the principles.
- Documented the process to share with future planning groups, so that we can learn from the activities that yielded the plan.
- Designed an evaluation plan for the plan as it is implemented during 2008-13, which was included as a key component in the strategic planning document.

Collaboration grows through the shared understanding and communication that arise through group learning activities.

- Collins, J. (2005). *Good to Great and the Social Sectors*. Boulder, CO: Jim Collins.
- Kaufman, R. (2005). Defining and Delivering Measurable Value: A Mega Thinking and Planning Primer. *Performance Improvement Quarterly*, 18(3), 6-16.
- Kaufman, R., Oakley-Browne, H., Watkins, R. & Leigh, D. (2003). *Strategic Planning for Success: Aligning People, Performance, and Payoffs*. San Francisco, CA: Jossey-Bass/Pfeiffer

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- Petrides, L. (2004). *Turning Knowledge into Action: What's Data Got to Do With It?* (Phoenix, AZ: League for Innovation in the Community College)
 - Solomon, R and Fernando Flores (2001). *Building Trust in Business, Politics, Relationships, and Life* (New York: Oxford University Press)

Selected web sites

- <http://www.scup.org/>
Web site of the Society for College and University Planning
- <http://www.jimcollins.com/>
Jim Collins' web site with excerpts from *Good to Great and the Social Sectors* and a useful diagnostic tool
- <http://www.nacubo.org/x3466.xml>
Tips on Integrating Planning and Decision-Making on the web site of National Association of College and University Business Officers

Final Thoughts & Questions

- *“Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice, and discipline.”* Jim Collins
- Collaboration requires discipline, and at times, “slowing down so we can speed up!”



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and/or see
<http://www.valenciacc.edu/strategicplan/>