

Next Steps in the Strategic Planning Process

Remainder of Phase Three: Strategic Research – “Discovering the Dots” (February, 2011)

Following the Town Hall Meeting, First Stakeholder Representative Group Meeting, Open Forums and conversations/meetings with faculty, staff, students and the community the Consultants will summarize the findings of the interviews for use by the Planning and Resource Council in the next phase of the planning process.

With the assistance of the Office of Institutional Research, a Research Subcommittee of the Planning and Resource Council will:

- a. hold discussions about information SWOSU has in hand (e.g., IPEDS data; NSSE results; HERI Faculty Survey results; recent HLC recommendations; local/regional economic and workforce development reports)
- b. conduct additional studies and data gathering, as needed
- c. analyze data on selected peers and competitors for information that might be helpful to the planning process
- d. summarize the most important findings

The Consultants will provide advice as needed on this.

Phase Four: Draft Statements on Values, Vision, Mission and Goals – “Connecting the Dots” (March, 2012)

A Guiding Documents Subcommittee of the Planning and Resource Council will review and reaffirm/refine the Core Values, Vision and Mission statements and make adjustments as necessary. The Consultants will provide advice as needed on this.

Day One of Consultants’ Visit #2 (Wednesday, April 4, 2012)

Morning

1. In the morning on the first day, the Guiding Statements Subcommittee and the Research Subcommittee will meet separately. Dr. Cohen will meet with the former and Dr. Rinella the latter.
 - a. The purpose of the Guiding Statements Subcommittee meetings is to further refine the Core Values, Vision and Mission statements and ready them for presentation to the full Planning and Resource Council meeting in the afternoon.
2. The purpose of the Research Subcommittee meeting is to review the findings of the meetings and forums completed by the Consultants in the February 13 – 17; review the findings of the research outlined in items a. – d. above; and draw implications for the following:
 - a. Points of distinction
 - b. Areas of greatest strength and promise
 - c. Forces, threats, issues that will affect the future of the University: population, HS graduates, demographics, etc.
 - d. Greatest needs and opportunities
 - e. Other factors that will drive strategic plan

Afternoon

There will a half-day workshop of the Planning and Resource Council to:

1. Review/endorse the work of the Guiding Statements Subcommittee so the Core Values, Vision and Mission statements can be presented to the Stakeholder Representative on Thursday, April 5, 2012 as working drafts.

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2. Draft the planning assumptions so they can be presented at the Stakeholder Representative Meeting on Thursday, April 5, 2012 as working drafts.
 - a. Enrollment growth, including gender; racial/ethnic distribution
 - b. Distribution of enrollment: UG versus Graduate,
 - c. Distribution of enrollment by instructional delivery: on-campus; online; hybrid
 - d. Likely trends in State funding: Up? Flat? Down?
 - Following this visit by the Consultants, the Budget Officer and Controller will develop more precise estimates of State and tuition and fee revenues using the planning assumptions. At this point the projections won't take into consideration any assumptions about revenue-enhancements resulting from goals and initiatives in the new strategic plan.
3. If there is sufficient time, the Planning and Resource Council will address the question, "Given all of the above, what do we have to do over the next five years to:
 - a. Further fulfill our Vision and Mission;
 - b. Leverage our points of distinction and areas of strength and promise;
 - c. Address the forces, threats and issues that will affect the University; and,
 - d. Address/realize our planning assumptions?

For Example:

We're going to have to:

- *Increase enrollment*
- *Increase retention and graduation rates*
- *Develop/expand academic offerings (e.g., courses, majors, minors) that link to emerging areas*
- *Enrich the classroom experience with applied and experiential learning*
- *Increase the level and opportunities for faculty scholarship and creative activity*
- *Enhance the quality of life for faculty and staff*
- *Increase and diversify revenues*

Day Two of Consultants' Visit #2 (Thursday, April 5, 2012)

Morning

A second meeting of the Stakeholder Representative Group will be held to provide an opportunity for the Planning and Resource Council to present the findings of the planning process thus far, particularly the:

- Working drafts of the Core Value, Vision, and Mission statements
- Findings and implications of the meetings and forums completed by the Consultants in the February 13 – 17 meetings and the research that followed
- Planning Assumptions
- If there was sufficient time for the Planning and Research Council to develop them, preliminary statements on what the University will need to do over the next five years

While the Consultants will coordinate the proceedings, members of the Planning and Resource Council will do most of the presentation. Following the presentation, those in attendance will be able to comment and ask questions.

Immediately following the meeting of the Stakeholder Representative Group, the Consultants and the Planning and Resource Council will meet to take stock and discuss the next phase of the planning process.

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