

Strategic Planning Process

Institutional Effectiveness
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AVP for IE

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*Oklahoma Baptist
University*

*Continuous Quality
Enhancement*

Table of Contents

Purpose	2
Introduction	2
University Planning Advisory Council	3
UPAC Coordinator	3
Annual Objective Process.....	3
Reports to the Board of Trustees.....	4
Revisions to the UPAC Strategic Initiatives	4
Strategic Planning and a Culture of Assessment.....	4
Sources of Data for Strategic Planning	5
Approval and Revision of this Procedure.....	5

Purpose

The purpose of this document is to provide guidelines for a process for strategic planning at Oklahoma Baptist University. Since OBU has an overarching strategic plan in place, this document will focus on the annual objective development, approval, and monitoring processes.

Introduction

In 2009, when Dr. David Whitlock was inaugurated as the president of Oklahoma Baptist University, he began the process of developing a strategic plan. That project included a robust process of vision casting from representative groups from around the campus. The result was the creation of seven strategic initiatives.

The seven strategic initiatives are listed in full in Appendix A of this document. However, the summary statements are:

1. **Enhance Academic Services, Programs, and Support:** Oklahoma Baptist University will aggressively monitor and address the needs for adapting curriculum to changing environments, studying and proposing missional-appropriate academic programs in the traditional liberal arts, professional areas, and graduate programs. Through establishing Centers of Excellence, OBU will position itself as a leader in targeted areas of expertise and leadership.
2. **Expand Student Scholarships:** OBU will aggressively expand existing scholarship programs and seek additional scholarships to recruit and retain targeted populations.
3. **Advance Student Services:** Oklahoma Baptist University will advance student services as a priority on the campus including new and expanded services in advisement, health and counseling, improved and additional housing options, and additional security improvements.
4. **Strengthen Marketing and Enrollment Management:** Oklahoma Baptist University will strengthen marketing efforts and enrollment management strategies by implementing an integrated marketing plan. A comprehensive enrollment management plan will aggressively increase enrollment and retention.
5. **Enrich Quality of Life for OBU Employees:** OBU will proactively improve institutional quality of life. University quality of life issues will be addressed, including significantly increasing salaries, wages and compensation packages for employees and implementing a strategic faculty compensation system.
6. **Reinforce Faculty Development:** OBU will reinforce faculty development through additional endowment, grants, and a University Press.
7. **Improve University Relations:** OBU will increase and improve external relations with its diverse constituencies including the local community, alumni, donor, and denominational relations. This initiative includes intentional efforts with local schools, community service and learning, and environmental stewardship.

Each of these initiatives is advanced each year by the creation of annual objectives that are assigned to owners. This process has varied through the history of strategic planning at Oklahoma Baptist University. The method presented here represents the current state and intention going forward, rather than to trace back what *has* been done.

University Planning Advisory Council

The University Planning Advisory Council (UPAC) is a standing council comprised of the President's Council, Deans Council, and Faculty Council Officers.

The UPAC will meet as necessary to monitor progress on the strategic initiatives, approve changes to the strategic plan, and to set annual objectives.

UPAC Coordinator

The UPAC coordinator shall be designated by the President and shall report directly to the President with regard to his or her UPAC responsibilities.

The UPAC coordinator is responsible for the following duties:

1. Function as moderator for UPAC meetings.
2. Coordinate regular updates to the Board of Trustees.
3. Facilitate communication of the progress on the strategic initiatives to the University community.
4. Facilitate the progress on the annual objectives selected by the UPAC and approved by the Board of Trustees.

Annual Objective Process

The annual objectives for the UPAC will be identified during the Budget Unit assessment plan development process, proposed by the Executive Leadership Team (ELT), reviewed by the UPAC, and approved by the Board of Trustees.

1. During the process of developing objectives for the Budget Unit assessments each year, budget directors will identify at least ONE of their organization objectives that strongly supports ONE OR MORE of the UPAC Strategic Initiatives. Where possible, these objectives should be supported by evidence from assessment of student learning and/or evaluation of operations. [HLC Core Component 5.C.2]
2. During the budget hearings where the budget unit objectives are discussed, members of the Executive Leadership Team will identify objectives that warrant raising to an institutional level or that can be combined with objectives from other budget units for a strategic emphasis at the university level.
3. The ELT will meet to discuss proposed UPAC Annual Objectives and create a proposed list for the UPAC to review. Typically, this list shall be around 10 objectives to prevent dilution of their strategic impact.
4. The UPAC will meet to discuss, revise, and approve a list of recommended annual objectives to the Board of Trustees. Normally this shall take place in time for the Board of Trustee Meeting in which the corresponding Fiscal Year budget is being considered to help ensure the connection between the strategic plan and budgeting. [HLC Core Component 1.A.3 and 5.C.2]

Reports to the Board of Trustees

The Board of Trustees should receive regular updates on the status of the UPAC Annual Objectives and the overall Strategic Initiatives. This may occur in written form as a part of the regular Board of Trustees information packet or through a presentation.

This is the suggested schedule of reports to the Board of Trustees:

1. A report on the overall status of the Strategic Initiatives may accompany the proposed UPAC Annual Objectives to provide context for the proposed objectives.
2. A focused report on the UPAC Annual Objectives from the previous Fiscal Year should be made available to the Board of Trustees at the Fall BoT meeting.
3. Updates on the progress on UPAC Annual Objectives should be made through the regular reports made to the Board of Trustees on Budget Unit Objectives. This shall normally be in the form of a standard WEAVE report (or similar).

These are all information reports and do not require action by the Board of Trustees.

Revisions to the UPAC Strategic Initiatives

Changes to the OBU 2020 Strategic Vision and the Strategic Initiatives will be managed by the UPAC Coordinator in coordination with the President and the UPAC. The UPAC shall affirm proposed changes and recommend them to the Board of Trustees for approval.

Proposed revisions may be developed through any appropriate means. However, care should be taken to ensure the initiatives are based on valid data and seek input from an appropriately broad set of stake holders, which may include both internal and external communities.

Strategic Planning and a Culture of Assessment

A culture of assessment is essential to effective strategic planning. A culture of assessment is a widespread organizational attitude that values evidence for decision making and planning.

Strategic planning should always be conducted with the University's mission in mind to ensure the priorities identified have a clear connection to the mission, purpose, and core values of the organization.

Strategic planning should be heavily influenced by observations derived from assessment of student learning and evaluation of operations. It should reflect realistic expectations of its current and future capacity, taking into account potential market fluctuations. Strategic planning should help link the budgeting processes to the mission oriented priorities under the influence of data derived from assessment.

Though influenced by data, strategic planning should also anticipate emerging factors, such as technology, demographic shifts, and globalization. Such forward thinking is part of an assessment culture as predicted trends help to interpret existing data.

Sources of Data for Strategic Planning

The following is a partial list of potential sources of Strategic Planning:

1. Assessment of Student Learning
2. Budget Unit Assessment
3. Academic Program Reviews
4. Assessments of the Strategic Plan
5. Benchmarking of peer and aspirational organizations
6. Results of Problem Investigations
7. Recommendations from OBU authorized surveys
8. Recommendations from external audits or assessment of OBU
9. Input from the Board of Trustees
10. Input from an advisory board
11. Feedback from external constituents
12. Recommendations from OBU authorized committees
13. Vendor recommendations
14. Literature and reports related to higher education

Approval and Revision of this Procedure

The Executive Leadership Team (ELT) shall govern the approval and revision of this procedure. The current revision of this procedure was approved by the ELT on 6 April 2017.