



INSTITUTIONAL
CONTEXT

1. ONBOARD
STRATEGIC
PLANNING TEAM

3. ANALYZE
STAKEHOLDERS

4.

15. IMPROVE AND
ADAPT THE PLAN

The Arc of Integrated Planning

Assess the
Landscape

Evaluate
Outcomes

Planning
Roadmap

Implement
Plan

Create
Plan

14. MONITOR AND
EVALUATE
PROGRESS

13. IMPLEMENT THE
PLAN

12. PREPARE FOR
IMPLEMENTATION

8. IDENTIFY
GOALS

Integrated Planning

A sustainable approach to planning that **builds relationships, aligns the institution, and emphasizes preparedness for change.**

I can imagine what you are thinking:

“I just started to understand strategic planning and now we have to do integrated planning? What is that? What do we ‘integrate’? How do we align institutional assessments with planning initiatives and resources? How does integrated planning support our mission as institutions of higher learning?”

All of which are worthy questions.

In a nutshell, integrated planning engages all sectors of the academy—academic affairs, student affairs, business and finance, campus planning, IT, communications, development, and more—and involves all stakeholders—faculty, students, staff, alumni, and external partners—to work together toward a common vision.

Integrated planning is not a one-time event but

a durable framework to create the infrastructure for institutional thriving. Integrated planning links resources, processes, and people with an institution’s mission, vision, and core values.

The SCUP Planning Institute provides the tools to help move everyone in the same direction—towards the achievement of your institution’s vision and mission.

Using the SCUP Integrated Planning Model—a strategic and operational planning process tailored for the complexities and challenges of institutions of higher education—in a hands-on, collaborative environment, you will create a solid foundation for planning for both the short- and long-term.

The SCUP Integrated Planning Workshop Series

The workshop series is a progressive learning experience designed to help you: Develop an accurate picture of your planning landscape; Ask hard but necessary questions; Build actionable plans; and Engage campus stakeholders in forming a sustainable campus plan to foster institutional thriving.

There are three sessions in the SCUP Integrated Planning Workshop Series:

- » Planning Institute 1: Foundations
- » Planning Institute 2: Planning as a Cultural Norm
- » Planning Institute 3: Optimizing Culture

Foundations: Laying the Groundwork for Integrated Planning

To succeed at planning, you have to plan for it.

In **Foundations**, you'll learn the planning process that takes place before you write your goals—planning to plan, stakeholder engagement, environmental scanning, and the identification of strategic issues facing institutions as they prepare for a sustainable future.

Participants will gain essential competencies including how to develop a planning process that works with your institution's unique structure, culture, and people. Once participants gain a firm foundation of the planning context participants will then use that process to analyze your institution and the world around it. What makes your institution unique? What opportunities will differentiate it? What strategic issues need to be addressed for it to succeed?

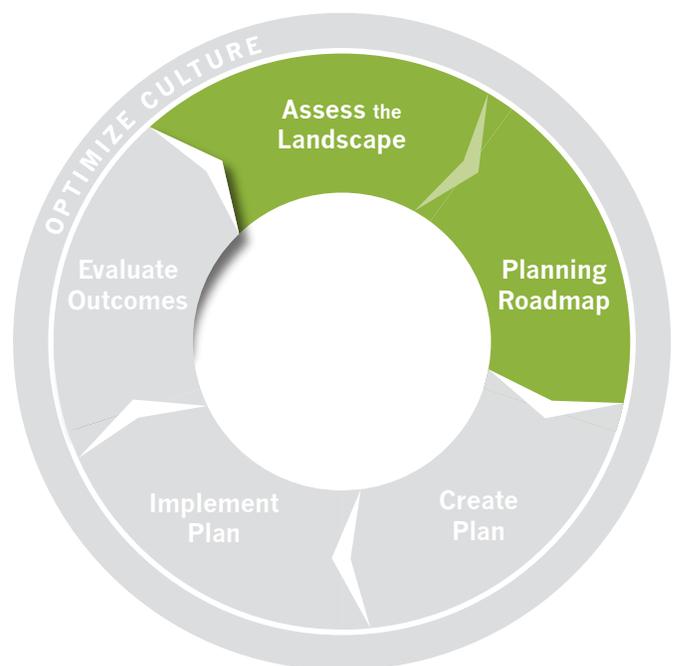
For those who...

- » Are preparing for the next planning cycle and want to do it better
- » Haven't written goals yet
- » Don't have a planning process in place

Learning Outcomes for Foundations

1. Assess your institution's readiness for change so you can remove change inhibitors and pave a pathway to success
2. Identify and analyze stakeholders for your institution, establish a planning team, and create a communication plan that ensures a transparent and inclusive planning process
3. Analyze your institution's internal and external environment, including global forces and trends, internal mandates, and competitors
4. Adapt integrated planning to your institution's unique situation

Learn more at www.scup.org/PIWorkshops



Planning as a Cultural Norm: Developing and Implementing an Integrated Plan

Implementation doesn't start when the written plan is finished; it starts when implementation is begun.

In **Planning as a Cultural Norm**, you'll learn the planning process that happens after you know what your institution needs to do, and figure out the 'how'—goals and tactics, alignment (up, down, and through the institution), resourcing the plan, and implementation with modification along the way.

In sum, you will develop the capacity to:

1. Create a plan that strikes that balance between aspiration and reality
2. Infuse the plan's decisions across your institution (we call this "alignment") so everyone's working towards the same vision
3. Nurture the planning processes in colleges, divisions, and departments.
4. Build buy-in and deal with resistance
5. Adapt your plan to changing circumstances

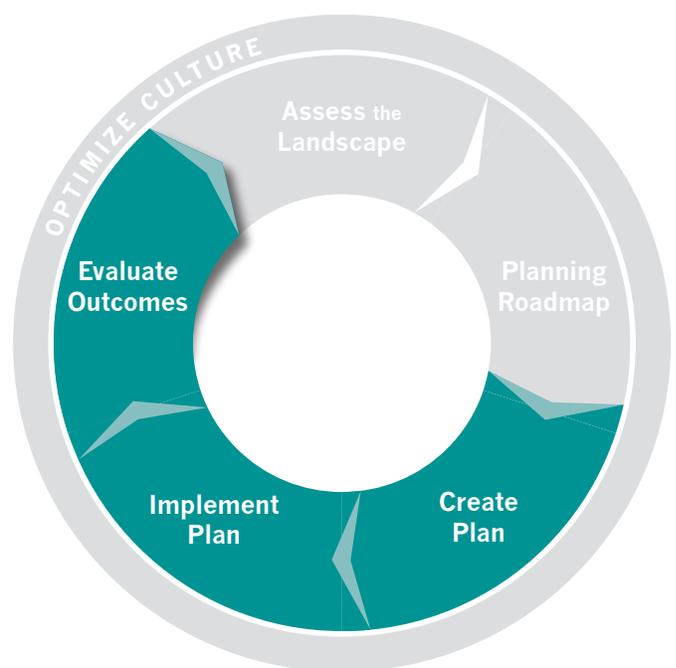
For those who...

- » Have goals determined
- » Have written the plan but don't know how to diffuse it into the rest of the institution
- » Struggle with implementation

Learning Outcomes for Planning as a Cultural Norm

1. Assess your institution's resources and culture so you create a strategic plan that can be implemented
2. Identify strategic issues that must be addressed and map strategies and tactics to address those issues
3. Align plans both vertically with the overall strategic plan and horizontally with other unit plans so the entire institution works together towards goals
4. Implement your plan and prepare for common implementation challenges

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Optimizing Culture: Building and Sustaining an Integrated Planning Culture

The planning process can only do so much to drive change in your institution. What if your institution's culture prevents change and growth?

In **Optimizing Culture**, learn how you can sustain an integrated planning culture—the practices that encourage stakeholders to collaborate, act strategically, and look to the future.

Optimizing Culture will assist you:

- » Clarify decision making at your institution so new ideas can move forward
- » Use boundary-spanning practices to encourage silos to work together
- » Manage difference and conflict
- » Prepare for the future with scenario planning

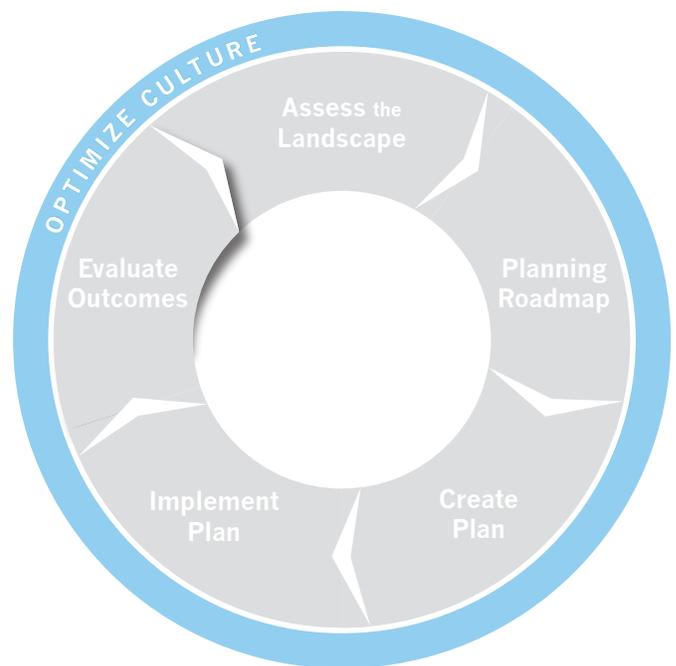
For those who...

- » Already have an integrated planning process down
- » Face persistent challenges or resistance that the planning process can't address
- » Want their institution to be ready for an unclear future

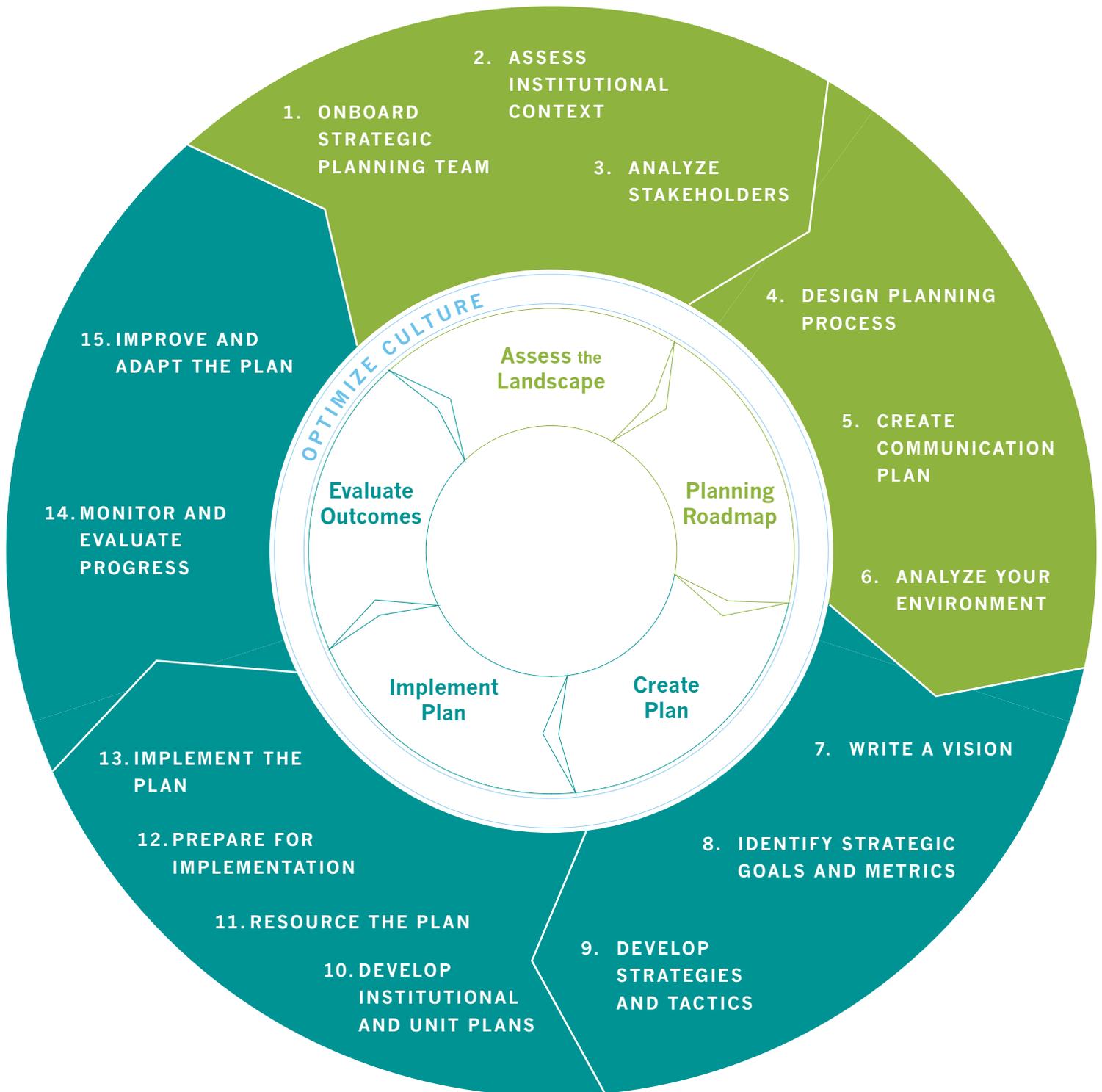
Learning Outcomes for Optimizing Culture

1. Identify and adopt tools, methods, and actions that build an integrated planning culture
2. Anticipate challenges and opportunities in a dynamic and unpredictable world so your institution acts more than it reacts
3. Examine and improve power and decision-making structures within your institution
4. Help stakeholders set-aside differences and work together across boundaries to achieve your institution's goals

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The Arc of Integrated Planning



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