

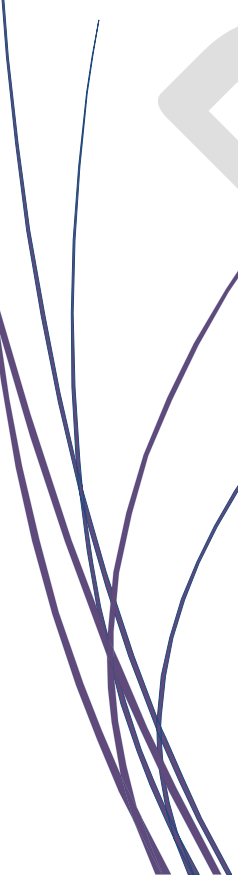


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Refining Strategic Planning at Montgomery College

Proposal for an Integrated Strategic
Planning Approach

DRAFT



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Introduction

Inarguably [strategic] planning is a critical asset of good management and governance; and it is necessary for organizations to be relevant and responsive in meeting the changing needs of the communities its seeks to serve. Universities and colleges are compelled to engage in a strategic planning process by a variety of forces, including fluctuating enrollment concurrent with a decline in government funding, changing student demographics, more stringent accreditation requirements, and increasing pressure toward marketization and competition with the emerging models of higher education while staying true to their core mission (Lerner, 1999; Kuh, et. al., 2015; Levy and Polnariev, 2016; Mahat and Goedegebuure, 2016; Norris, 2017). Strategic planning is one of the major steps a university or college can take to address these challenges and to find its own competitive advantage within the higher education environment.

Planning provides opportunities for systematically creating a shared organizational vision, setting goals for the future, and enabling a governance board to establish policies and goals concomitant with that vision. Although strategic planning can serve as a blueprint for achieving organizational goals, often some organizations implement a strategy without a plan. This approach to institutional planning has been the subject of criticism. Among the criticisms is that “some organizations begin implementing strategies before they clearly articulate mission, goals, or objectives...and in such cases strategy implementation precedes strategy formulation.” Henry Mintzberg often refers to this approach as emergent strategy rather than planning (Barnat, 2017). To demystify the concept of strategy in the planning process, Watkins (2007) offers that

mission is about **what** will be achieved; the value network is about with **whom** value will be created and captured; strategy is about **how** resources should be allocated to accomplish the mission in the context of the value network; and vision and incentives is about **why** people in the organization should feel motivated to perform at a high level. Together, the mission, network, strategy, and vision define the strategic direction for a business. They provide the what, who, how, and why necessary to powerfully align action in complex organizations (p. 3).

The planning literature consistently reiterates that successful planning and execution is not the product of any one tool or methodology—appropriate in every work setting. However, there is agreement that it “requires a new generation of user-friendly metrics and analytics.” This new generation of metrics and analytics is imbedded in planning to plan through well integrated processes and practices. A well designed and implemented strategic planning process can provide an institution with a forum for collegewide conversations about crucial decisions and an organizational framework for making assessment, resource allocation, and accreditation easier.

At Montgomery College, the emerging strategic planning philosophy is rooted in theory, practical perspectives, and best practices about planning that align with the Norris and Poulton (2010) notion, “Planning is a core competency of successful organizations, leaders, and managers,” and planning should be facilitated through an integrated and inclusive process (p.1). The senior leadership and Board of Trustees intentionally espouse this philosophy by being deliberate and purposeful about setting priorities essential to achieving the College’s mission and vision and by being proactively

responsive to its dynamic internal and external environments. Furthermore, this intentionality is demonstrated through their commitment to enabling a structured, data-driven, integrative planning process. Currently, the College is proactively moving forward with refining its strategic planning process. To do so, a review of strategic planning literature and extant research was undertaken to identify some compatible and most ideal best practices for the College to adapt or adopt. Also, there was an analysis of the College’s current strategic planning model, including its strengths and weaknesses. Finally, recommendations are offered to refine the existing college planning processes and to implement an integrated planning model. A summary of the research and analysis follows, as well as suggestions for implementing next steps to move forward.

Montgomery College Current Strategic Planning Picture and Model

Montgomery College’s strategic planning process is built upon the best practices of integration. The College’s current strategic planning model (Figure 1) was first articulated in 2012, as part of the Middle States Periodic Review, and served as the basis for developing the *Montgomery College 2020* strategic plan. This planning model was refined again in 2015 as part of the *Montgomery College 2020* Refresh Project¹ and further refined with input from representatives of the Senior Administrative Leadership Team (SALT) and additional research on planning best practices.

Figure 1: Current Montgomery College Planning Model



The foundation of the College’s planning process is its mission, vision, and values, which establish the broad institutional priorities guiding planning. These aspirations were developed in 2010 as the result of a year-long participatory and collaborative effort. The five themes in *Montgomery College 2020*

¹ The *Montgomery College 2020* Refresh Project was developed to conduct a “mid-point” review of the College’s strategic plan with special attention to the performance canvas and the plan’s initiatives. More information about the project, including all recommendations, can be found at <http://cms.montgomerycollege.edu/president/>.

provide the long-term planning framework for the College. Each theme has a group of specified outcomes and measures, as reflected in the *Montgomery College 2020* Performance Canvas. In addition to the College's long-term strategic plan—*Montgomery College 2020*—there are several existing long-term College “master” plans, including the Facilities Master Plan (FMP), the Information Technology Strategic Plan (ITSP), the Academic Master Plan (AMP), the Affirmative Action Plan, and the Diversity Strategic Plan. Additional master plans that are currently in development or on the horizon include the Student Services Master Plan and the Professional Development Master Plan. Each of these master plans takes their direction from *Montgomery College 2020* and align with its themes. Like *Montgomery College 2020*, these plans provide a long-term strategic direction upon which annual initiatives and strategies are developed to actualize the integrated strategic direction. Within the framework of this model, annual and tactical planning at the College begins with prioritizing broad fiscal year goals, under which the various planning initiatives and strategies are organized. Currently, the practice is to look at initiatives on a three-year basis and develop the annual strategies necessary to move each initiative forward. While some initiatives and strategies can be considered “one-offs” requiring a simple change in practice or structure, many initiatives involve multiple strategies that are sequential and build upon each other, requiring a much more nuanced approach at coordination. The resources necessary to operationalize these initiatives and strategies are carefully considered in building the long-term capital budget and the annual operating budget priorities.

Implementing the plans often requires a readjustment based on final approved budgets, new data, and changes to the overarching priorities. Management of the initiatives occurs at the SALT level, with each SALT member responsible for assigning responsibility to units within their respective division to implement the annual plans and manage the related activities. Each initiative and related strategy is mapped to a *Montgomery College 2020* theme, which, in turn, is associated with specific Performance Canvas Indicators. This broad level of measurement allows for an integrated assessment of annual strategies, three-year initiatives, and the long-term *Montgomery College 2020* themes. Recent changes to the budget document now allow for the tracking of expenditures related to strategies, initiatives, and ultimately, *Montgomery College 2020* themes.

Progress on the Performance Canvas is assessed and reported annually. In addition to the Performance Canvas measures, assessments from the College Area Review efforts (programmatic and administrative) are also used to assess performance. These assessments are used to inform the development of the next annual plan and operating budgets, but, more importantly, these assessments are used to refine the strategic directions in their associated master plans. This allows for a broader assessment of the long-term priorities, which, in turn, inform and necessitate changes in annual planning.

Montgomery College Planning Model Strengths and Weaknesses

While the College has made strides in directly linking the various planning and budgeting processes, there is a need to fully “close the loop” by formally integrating assessment-based planning and budgeting. The College has most, if not all, of the required elements for an integrated planning system—but they currently exist in silos. Planning and assessment is being done and has been formalized within the *Montgomery College 2020* initiatives that directly link to the budget, but many other planning and assessment activities remain disconnected from the core *Montgomery College 2020* process. An integration model exists in the *Montgomery College 2020* Refresh recommendations, the MSCHE 2012 Periodic Report, and the MSCHE 2018 Self-Study. However, the model does not live within the broader college community and has not been institutionalized and formally aligned with other processes.

There is no integrated institutional calendar that details the various cycles and dates for planning, program review, budgeting, facilities planning, capital planning, etc. Planning activities are occurring at multiple levels of the College, resulting in what Hanover Research calls “parallel planning universes” (2013). Often times, the College community may or may not be aware of the variety of activities underway during the various planning processes. Many of these plans may require changes in or impact operations across multiple units of the College. When planning activities are not integrated it can lead to a lack of coordination, duplication of effort, competing budgets, and a flawed implementation of strategy.

The *Montgomery College 2020* themes have served as an effective framework, however several planning, unit budgeting, program review activities, decisions, and assessments are disconnected from *Montgomery College 2020*. Although a unit may document goals that align with *Montgomery College 2020*, in practice that unit may end up implementing and assessing activities that are not adequately documented or connected to *Montgomery College 2020*. Linking to *Montgomery College 2020* becomes more of a checklist activity—something that has to be done—rather than a deliberate and intentional organizing principle.

Data assessment and review in connection to planning and budgeting is fragmented. Although it does occur, it is not formalized, deliberately integrated, or systematically communicated. College Area Review, Outcomes Assessment, the Student Success Score Card, and the *Montgomery College 2020* Performance Canvas all reference and make surface connections to each other. Nonetheless currently these connections are not fully articulated in a way that makes the connections and assessments explicit.

Related to the fragmented data collection, response to data needs to support these processes and the collection and communication of data are mostly reactive instead of proactive and formalized. Data requests are, for the most part, ad hoc, occurring only when an issue arises or when there is a need for specific data. The College collects and communicates a wealth of data at various times for various stakeholders, both internal and external. However, the data can differ depending on the requirements (i.e., 3-year graduation rate v. 4-year graduation rate, all students v. first-time, full-time students), the time of year (i.e., Fall Enrollment v. annual enrollment), and the specific need or

question being addressed. To better anticipate data needs when they arise, more work needs to be done to inventory the various data collection points, times, content, and purpose.

Best Practice Strategic Planning Models

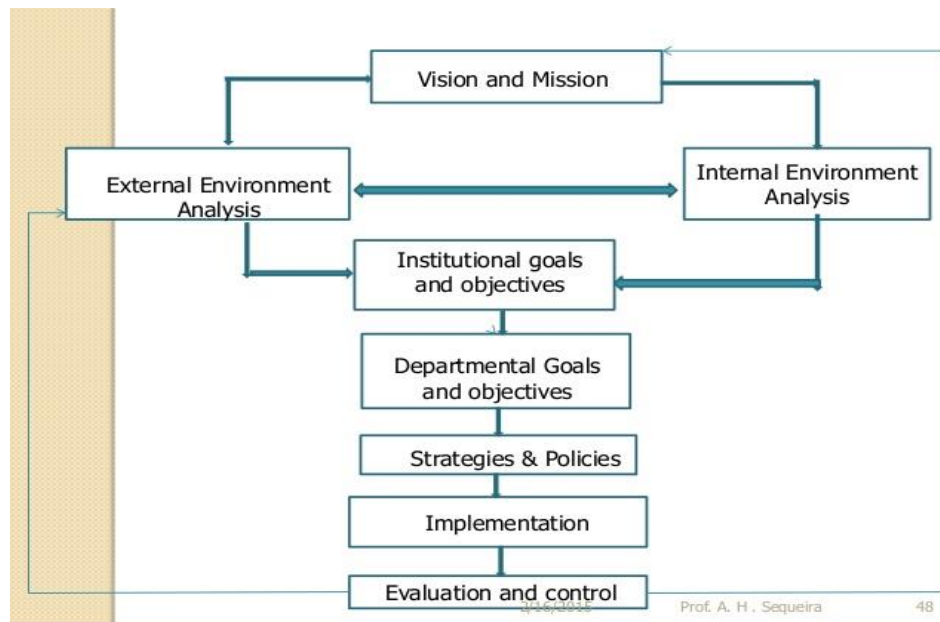
The practice of strategic planning has been imported from the business world (which had adapted it from the original military model). But it is essential to take the specific nature and modes of operation of higher education into consideration if strategic planning is to be accepted and embraced both as a concept and a system that can provide direction and facilitate progress. Overall, strategic planning at universities and colleges have been only moderately successful, as only a few have been able to achieve significantly successful results (Barber, Donnelly, & Rizvi, 2013; Norris, 2017). Others have been able to make important changes in parts of their operations, but many institutions have stumbled, dissolved into controversy, or lost their nerve (Rowley, Lujan, & Dolence, 1997; Norris, 2017). On the other hand, some have remained too timid, cautious, or anxious about the pace of change to adequately respond (Barber, Donnelly, & Rizvi, 2013). Pisapia (2009) argues that strategic leaders must have the capacity to evaluate and assess the organizational situation and determine whether and what type of change is necessary. This requires new strategies and models to manage change in order to develop and maintain high organizational performance.

Most strategic planning in higher education is informed by and organized around models adapted from the business world. Among these models are the *Basic Strategic Planning Model* and the *Issue-Based or Goal-Based Planning Model*. A third model, the *Integrated Strategic Planning Model*, was developed within the context of higher education through dialogue among various college and university planners.

Basic Strategic Planning Model

The “Basic Strategic Planning Model” is often effective for organizations that do not have much prior experience doing strategic planning or those that don’t have much time to spend on the strategic planning process.

Figure 2: Basic Strategic Planning Model

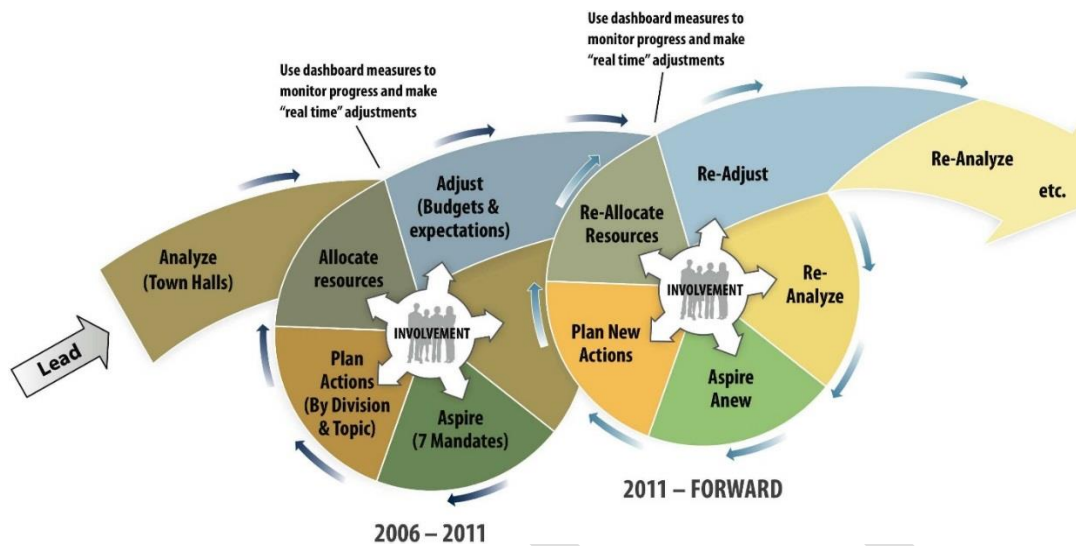


This basic model places the vision and mission at the foundation of the planning process and includes deliberate internal and external environmental scanning to inform institutional goals and objectives. The broad goals and objectives then inform departmental goals and objectives, as well as strategies and policies needed to implement the goals. Assessment is simplified and relies mostly on measuring responses to external demands (the business influence) and achieving the mission. This model can often perpetuate and exacerbate parallel planning silos because it makes no explicit assumptions about, nor does it take into account, other planning processes outside of the core strategic plan. Prior to the creation of *Montgomery College 2020*, this was the primary model used by Montgomery College.

Issue-Based or Goal-Based Planning Model

The “Issue-Based or Goal-Based Planning Model” is an enhancement of the basic model and is often used by organizations that are more established and want to go deeper into the strategic planning process.

Figure 3: California State East Bay Issue-Based or Goal-Based Planning Model



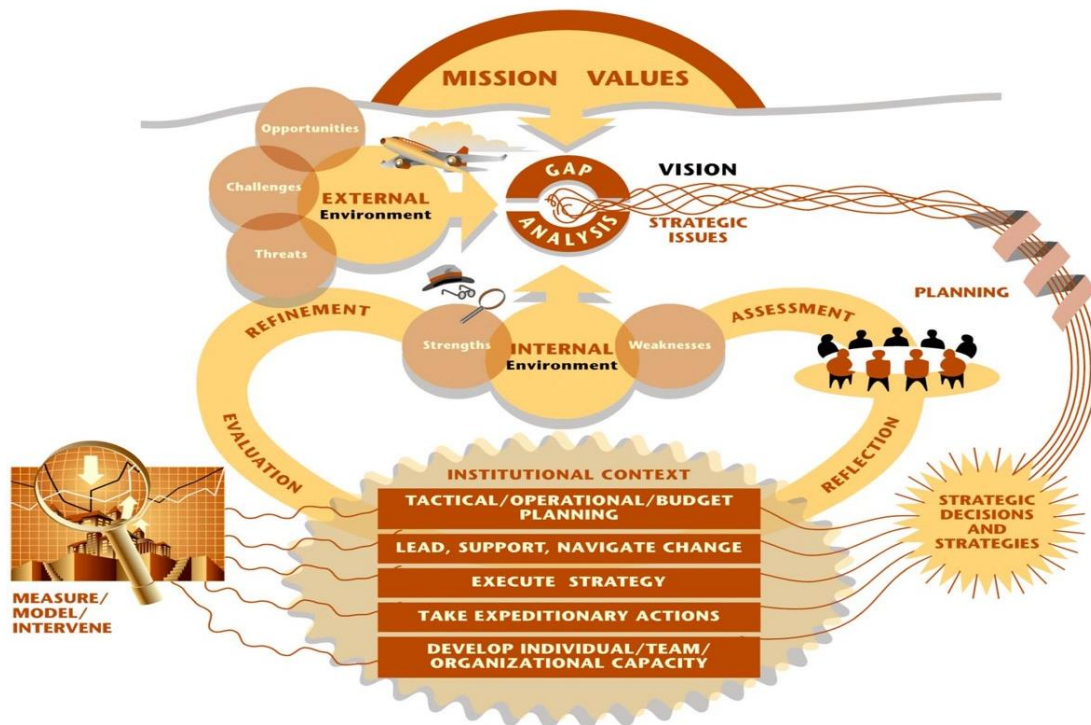
This model (currently used by several higher education institutions, including the diagram above from California State East Bay) starts off with an analysis of the external environment and key stakeholder issues or goals on which the organization will focus, prioritize, and align with their institutional goals (i.e., the Seven Mandates). Action plans are developed for the goals and issues that detail the steps necessary to implement the goal. Budgets are developed or adjusted based on these action plans and resources are allocated to implement the goals. This model explicitly utilizes dashboard measures to monitor and make real-time adjustments. For strategic plans that look at more than one year in the future, the development of a yearly operating plan is useful to keep the plan manageable and on-track. Often organizations develop strategic plans for three to five years and then conduct annual reviews and updates of the larger plan. Regular evaluation, monitoring, and updating of the strategic plan is critical to its effectiveness; and it is helpful if these reviews are written into the actual plan to ensure all stakeholders keep on track. This model improves on the Basic Model with a systematized process of continuous evaluation, but, like the Basic Model, it does not take into account or attempt to incorporate other planning processes that exist apart from the core identified issues.

Integrated Strategic Planning Model

The “Integrated Strategic Planning Model” developed by the Society for College and University Planners (SCUP) takes the elements of the Basic Model and Issue-Based Model and molds them into a global process that explicitly takes all areas of the institution into account. What is gained through the use of this model is an institutional understanding of the role of a strategic plan and what key elements are necessary for the plan to function.

Figure 4: Integrated Strategic Planning Model

Model for Strategic Planning and Executing Strategy

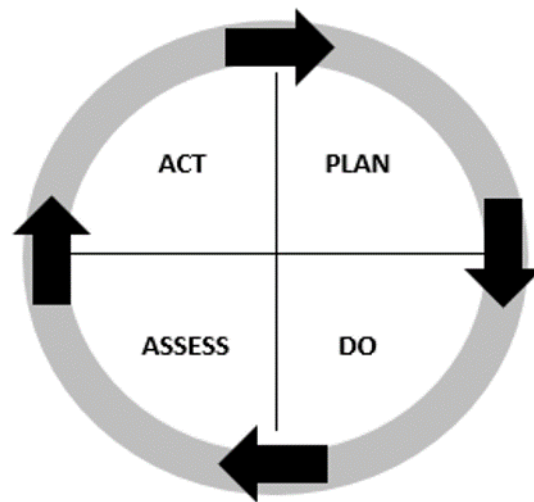


Source: Adapted from the Society for College and University Planning (SCUP) Strategic Planning Model created by Bruce Flye 2006.

The integrated model includes the basic planning model idea of the process as “mission-centered” and incorporates both internal and external environmental scanning. The integrated model also incorporates elements of the Issue-Based model in the form of a gap analysis that specifically looks at stakeholder issues, along with structured assessment. What distinguishes the Integrated Model from the Basic and the Issue-Based models is its explicit consideration of the institutional context—which includes the institution as a whole, including all functional aspects as well as organizational capacity—and not just the goals and strategies developed to address specific concerns.

Integrated planning is a *sustainable approach* to planning that *builds relationships, aligns the organization, and emphasizes preparedness for change*. There are well documented advantages to an integrated and inclusive strategic planning process, as well as documented disadvantages to implementing contrarian processes. As a best practice, integrated planning is the linking of vision, priorities, people, and the physical institution in a flexible system of evaluation, decision-making, and action. It shapes and guides the entire organization as it evolves over time and within its community (SCUP definition). Integrated planning is built around a simple four-part continuous loop (Kahn, 2011).

Figure 5: Kahn Integrated Planning Loop



Kahn's four-part loop to planning is essential to continuous improvement and should be used when starting any new project, developing a new process design, defining a repetitive work process, prioritizing problems, and implementing change. Just as a circle has no end, the integrated four-part model is ideal for designing a planning and budgeting process where steps are routinized and each one provides data for assessing the next step or in setting priorities. A continuous cycle such as this is critical in higher education, particularly an institution like Montgomery College where parallel processes of planning, assessment, and program review are deeply intertwined. Deliberately integrating program assessment (both academic and administrative) and measuring key performance indicators, such as retention, cost, student success internally, and benchmarking against peer and aspirant institutions, provide valuable evidence to the College, board, external funders, and accreditors that planning priorities are moving the College forward in a meaningful and fiscally responsible way.

An integrated planning process that matches organizational capacity with internal and external needs must also demonstrate flexibility and agility in seizing opportunities as they arise. Planning processes that match organizational capacity with environmental needs also must demonstrate organizational agility. Seizing opportunities quickly reduces the risk of start-up expenses and accelerates the return on investment; moving quickly helps the College and its partners fill voids and market needs. Montgomery County and the College's local business partners need a properly trained workforce and they do not have the time to wait for College responses mired down in process or budgetary conflict.

Support of strategic priorities underpinned by a shared understanding of how they affect financial performance requires a unity of effort. The president and senior leaders, vice presidents, deans and department chairs, directors and managers need a familiarity with the data, both performance and fiscal, to understand the direct and indirect costs of initiatives. This knowledge is crucial for aligning the College's human, physical, technological, and financial resources with strategic priorities and emerging opportunities. Community is fostered and empowered by a shared investment in decision

making and understanding the relationship among the resources. Moreover, this knowledge is optimized when our college community of strategic planners interdependently link academic, resource, and facilities planning and understand their work within the taxonomy of higher education planning, as illustrated in Figure 6. This taxonomy provides a model to categorize and classify higher education components and functional areas in an organized framework for planning.

Figure 6: Categorical Taxonomy of Higher Education Planning

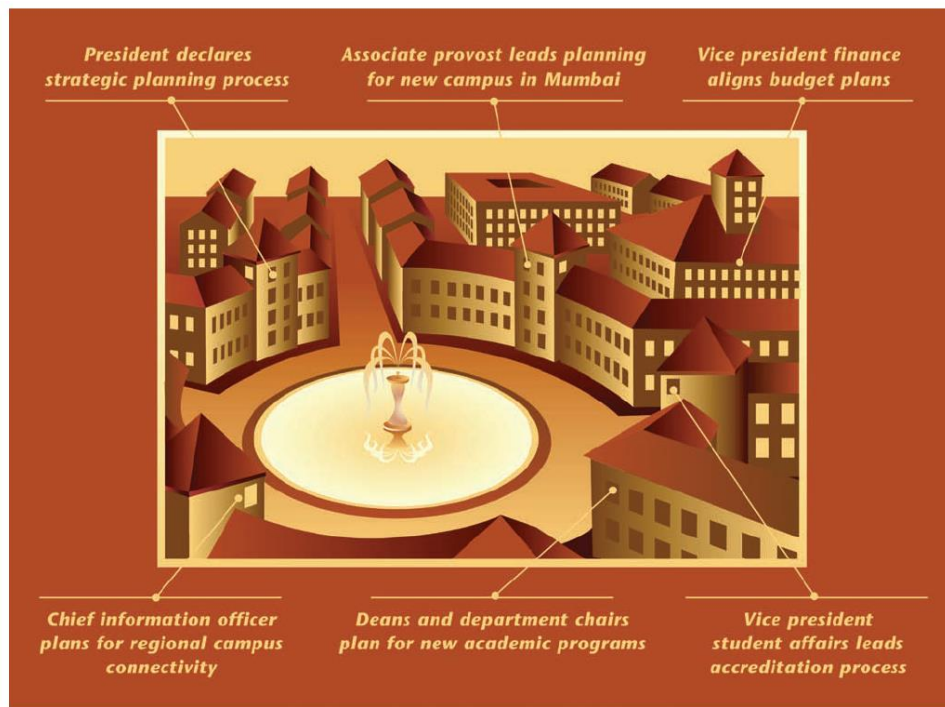
A Categorical Taxonomy of Higher Education Planning

Academic Planning	Resource Planning	Facilities Planning
• Instructional curriculum	• Human resources	• New construction
• Academic support services	• Budget planning	• Facilities renewal and renovation
• Student support services	• Investment strategies	• Technology
• Residential life	• Fund-raising/development	• Campus infrastructure

Source: Hollowell, Middaugh, and Sibolski 2006.

At the other end of the planning spectrum, Norris and Poulton (2010) provide a snapshot of the roles, responsibilities, and perspectives of college and university planners in contemporary higher education environments (Figure 7). The snapshot characterizes a planning process wherein the president shares planning frameworks and seeks an evaluation of the institution’s readiness to collaborate on planning within a preferred framing process—albeit a disintegrated and non-interconnected process supported by distinct silos and roles. Also, the snapshot infers the dysfunctions and challenges that can result from disintegration, dissection, and disconnection in an organizational planning process. Although there is no empirical evidence that one tool or methodology for planning fits every organizational environment, the consensus and preference among planning experts is an integrated and inter-connected process.

Figure 7: Norris and Poulton's snapshot of the many roles, responsibilities, and perspectives of college and university planners in today's higher education environment



Why Integrated Planning Is the Preferred MC Process and the Benefits of Integrated Planning

Montgomery College has been implementing various elements of the integrated approach over the last several years, particularly with the creation of *Montgomery College 2020*. The revisions to the College's organizational structure during this time have moved the institution closer to the ability to integrate the multitude of planning, assessment, and program review activities; however, silos and parallel processes still exist. In many instances, the structures exist for an integrated approach and the College is proceeding as an integrated institution, but a formalized, organizing framework for full alignment has not been widely articulated and implemented.

Fully embracing the integrated planning model will bring clarity to planning, assessment, and program review activities by integrating the various goals and objectives of these processes into the overall strategic direction of the College. Establishing and articulating an integrated approach will allow the College to more deliberately align existing and "on the horizon" master plans and create a more focused approach to anticipatory long-term resource allocation, rather than a reactive year-to-year budgeting approach.

A fully realized integrated strategic planning model not only builds upon and leverages the College's current strengths and structures moving forward, but it also satisfies our Middle States Commission for Higher Education (MSCHE) expectations related to Standard I: Mission and Goals and Standard VI: Planning, Resources and Institutional Improvement. The organizing framework provided by

Montgomery College 2020 has allowed the College to clearly demonstrate to our accreditors that our goals are linked to the mission and drive priorities compliance with Standard I. An integrated planning model within Standard IV requires that the College's

...planning processes, resources, and structures are aligned with each other and are sufficient to fulfill its mission and goals, to continuously assess and improve its programs and services, and to respond effectively to opportunities and challenges.

The integrated planning model proposed here will allow the College to fully demonstrate to MSCHE that we are proactively systematizing these critical institutional processes in a deliberate and integrated way. Furthermore, an integrated planning model that takes into account the uniqueness and stakeholder demands of each process and incorporates these characteristics in a holistic approach will respect the work currently being performed and link the strengths of each one to an approach where each is more properly aligned with the broad strategic direction and mission of the College. The integrated planning model will provide a clearer framework for harmonizing priorities and sustaining the alignment of processes to allow the College to be more agile and flexible in responding to internal and external opportunities with minimal disruption of the various cycles.

Recommendations and Next Steps

Sequentially, strategic thinking and strategic planning will provide intentional opportunities for the College to consider its long-term objectives within its internal and external environments and to plan measurable tactical goals to achieve sustainable success. As a pragmatic organizational and operational practice, a precursor to a viable institutional strategic planning process and strategic plan will be *planning to plan*. *Planning to plan* will serve as the preparatory work for setting the context of the College's strategic planning process. This preparatory work will include:

- designing the process;
- understanding organizational culture;
- developing and gathering resources;
- determining the constituents to be engaged in the process (e.g., existing committee or a new strategic planning committee, decision makers, strategic thinkers, action thinkers);
- establishing a timeline;
- identifying required staff and staff time;
- determining the primary writers of the plan;
- communicating with key stakeholders during the planning process; and
- approving the plan.

As a tactical strategy, *planning to plan* will create space to explore vulnerabilities and the politics of the process, anticipate resistance, identify its source, and perhaps even manage it. Strategic thinking will be a critical element of *planning to plan*, with the ultimate goal of identifying strategies that articulate the College's "intent for the future through clear vision, considered decisions, and purposeful initiatives" (Norris and Poulton, 2010, p.2).

With *planning to plan* in mind, a recommendation for the first proposed step in refining the Montgomery College strategic planning model is to conduct an inventory of all institutional planning processes. To accomplish this task, we propose organizing a formal Integrated Institutional Planning Affinity Group (IIPAG) as a means of gathering together all institutional planners face-to-face on a periodic and routine basis to discuss issues and challenges related to integrated planning and assessment at Montgomery College. Therefore, we propose the key affinity group should include representatives from:

- Academic Affairs
- Administrative and Fiscal Services
- Advancement and Community Engagement
- Budget and Finance
- Facilities
- Human Resources and Strategic Talent Management
- Information Technology
- Institutional Assessment
- Institutional Research and Effectiveness
- Program Review
- Student Affairs
- WD&CE

The Integrated Institutional Planning Affinity Group should be charged with creating a master planning, review, assessment, and budgeting calendar that takes into account data needs and external deadlines. This calendar would then form the foundation of a newly created Integrated Planning Manual for Montgomery College that would be widely disseminated and include specific dates with key processes, which stakeholders are involved, and by whom. A full inventory and integrated planning calendar would allow better data collection planning. Knowing dates for specific data availability and dates for data review documented in the process would result in less ad hoc reporting and increased knowledge of what data are available and when. This would also allow the Office of Institutional Research and Effectiveness (OIRE) and others to plan their data production schedules accordingly.

The creation of a master calendar and an Integrated Planning Manual would be a huge leap forward for the College. To complement this effort, we also recommends identifying practical technology solutions, such as Tk20². This kind of technology solution can provide the College with a centralized repository of all planning, program review, and assessment activities, which could be tied directly to *Montgomery College 2020* themes, as well as capturing activities that relate to our core functions. A technology solution would allow easy, convenient, integrated reporting and better tracking.

² Tk20 is an online platform that streamlines data collection and allows for cross-process (planning, assessment, program review) integration of reporting and mapping. Tk20 is currently being used successfully for the MSCHE Self-Study and Outcomes Assessment. The capabilities exist to fully integrate all planning, assessment, and program review activities.

Finally, we propose to formalize the collection and review of data into the planning and budgeting calendar, using existing metrics (e.g., Performance Canvas, Score Card, Financial Ratios, etc.) as the starting point. Tk20 could allow the integration of all of these metrics and allow program and administrative unit review assessment to be more accurately mapped.

Summary and Conclusions

As previously mentioned, Montgomery College has developed effective systems for planning, resource allocation, and continuous improvement. Silos of excellence exist across the College. While collaboration and dialogue among the various systems of planning, assessment, and program review take place, there is no formalized process or means by which alignment can be systematically assured. The College has the elements in place or are in the process of developing those elements and processes that can form a fully integrated strategic planning model. This proposal seeks to bridge the gap, align the various processes we have, and articulate an integrated approach to planning that will enable the College to be responsive to students and the community and be good stewards of public resources.

As the introduction to *Montgomery College 2020* states:

For the county, success at Montgomery College directly contributes to the economic and social well-being of the county. For the state, success at Montgomery College positions the surrounding community to reach new heights in education and workforce development. Success means that the College offers students relevant academic programs, comprehensive student services, and cutting-edge infrastructure to empower students to fulfill their educational dreams, create a better life for themselves and their families, and become informed, contributing members of society.

The College has made great strides in achieving this vision utilizing its loosely coupled systems of planning and excellence. In planning for the conclusion of *Montgomery College 2020* and in looking ahead to the future, articulating a new framework for strategic planning at Montgomery College is both necessary and critical if the College is to remain relevant, responsive, and responsible to ourselves, our community, and our future.

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