



THE UNIVERSITY *of* MONTANA WESTERN

STRATEGIC PLANNING PROCESS

September, 2019



STRATEGIC PLANNING STEERING COMMITTEE



THE UNIVERSITY *of* MONTANA WESTERN

Goal

Facilitate process that builds from areas of **strength, promise & opportunity** to create a Strategic Plan that will guide the future of UMW for the next 7 years.

STRATEGIC PLANNING STEERING COMMITTEE

CHARACTERISTICS OF SUCCESSFUL PLANNING AND IMPLEMENTATION

- **VISION AND MISSION DRIVEN**
- **POSITIVE AND OPTIMISTIC**
- **BUILDS ON PAST**
- **DEVELOPED BY CAMPUS**
- **OPEN AND COLLABORATIVE**
- **FOCUSED AND IMPLEMENTABLE**
- **CONVERSATIONAL**
- **CREATIVE**
- **REALISTIC**
- **MEASURABLE**

ELEMENTS OF A STRATEGIC PLAN

What are the fundamental beliefs?

Looking into a crystal ball,

What is our ideal future?

Who are we?

What do we do?

Whom do we serve?

How are we different?

What do we have to do
to achieve Mission
and move forward?

How will we know when
we have arrived?

Desired Outcomes

What are we going to do to
achieve our Desired
Outcomes?

Why? What? Examples

Core Values



Core Values



Inside ⇌ Outside

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STEP 2 (SEPTEMBER, 2019)

Initial Meetings:



Town hall

Small Group Discussions



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Step 3 (September/October, 2019)

SPSC has Refined Vision. Mission. Strategic Priorities/Goals

- Core Values, Vision, Mission
- Strengths
- Needs/Opportunities
- Major Forces
- Planning Assumptions
- Top Strategic Priorities/Goals



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STEP 4 (OCTOBER, 2019)

Feedback from University Community ON

Core Values, Vision; Mission; Strengths, Needs; Major Forces; Planning Assumptions; Strategic Priorities/Goals



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STEP 5 (NOVEMBER, 2019)

1. SPSC refines values, mission, vision, strengths and needs, planning assumptions, strategic priorities/goals
2. SPSC creates a cross-departmental Working Group for each Strategic Priority/Goal
3. Estimate revenues from traditional sources based on historical trends and planning assumptions: enrollment, etc.



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STEP 6 (NOVEMBER/DECEMBER, 2019)

Formulate Desired Outcomes – “*Charting the Course*”

- Working Groups identify the Desired Outcomes, for example:
 - *Increase head count by 200 students*
 - *Increase first-year retention to 80 percent*

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STEP 7 (JANUARY, 2020)

Second Town Hall

- Feedback on Desired Outcomes
- Begin Strategy Development



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STEP 8 (FEBRUARY/MARCH 2020)

Determine the Strategies

- SPSC to assess priorities among current plan initiatives and select those that are most important to achieve desired outcomes
- The strategies selected will be:
 - Organized around goals
 - Work across organizational and campus lines
 - Emphasis on “big ideas”
 - Strategies are elaborated expressions of an idea
 - Intro and Background
 - Basic Elements and Description
 - Models

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STEP 9 (APRIL, 2020)

Complete Plan and Seek Endorsements

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CELEBRATION!

