"Integrated" Planning

Definition

The planning process;

- identifies the goals or objectives to be achieved,

- formulates strategies to achieve them,

- arranges or creates the means required, and
- implements, directs, and monitors all steps in their proper sequence

Levels of Planning

Levels of Planning

Vision

Mission Statement

Strategic Goals

Activity Plans

Activity Plans

Deliberately vague
Stable over the long term
No prioritization
No consideration of resources

Primarily aimed at external constituents

Actual workable statements to guide internal planning

Specific activities and objectives that consider the current situation

Explicit statements
Unstable
Defines priorities
Considers resources

Tactical Priorities

Strategic Goals → Dead end planning

Tactical Priorities

Adds the information needed to develop actionable plans

Tactical Priorities consider

- Resource availability
- Medium term priorities
- Staff consultation

Service Area Plans → Undirected planning

Project Management

- Format for Service Area Plans

A discrete piece of work with set boundaries of scope, time, resources and anticipated outcomes.

Monitoring	• Set deadlines • Achievement
Accountability	• Named project managers • Budget information
Evaluation	• Activities grouped under goal • Post implementation evaluation
Standardized	• Apply to different areas • Repeatable, training

Monitoring and Accountability

- Everyone's responsibility to be thorough, accurate and up to date

Resource Allocation

- Budget requests and allocations
- What areas are doing what

Problem Areas

- Projects slipping behind schedule
- Dependency management

Evaluation

- Achieving the mission
- Project evaluation
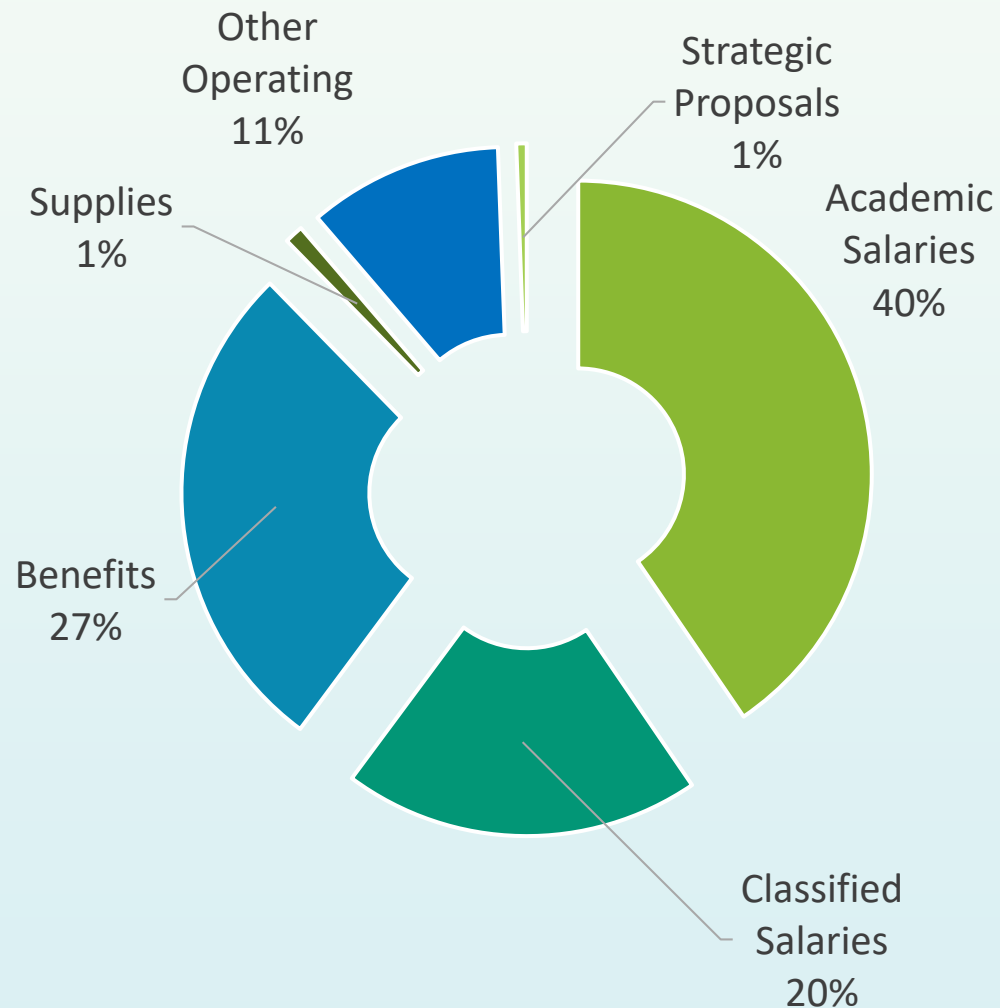
Resource Allocation

Identification

Consultation / Recommendation

Prioritization

Confirmation

Strategic Proposals

Pie chart: Academic Salaries 40%, Classified Salaries 20%, Benefits 27%, Supplies 1%, Other Operating 11%, Strategic Proposals 1%

Intent

Allow for innovation and expansion in face of decreasing budgets

Problems

- 'Hijacked' by IE requests

- Time devoted to decision making/understanding

- How does it relate to categorical funding?

- How to say no

Next Steps

- Develop tactical priorities
- Share with service areas
- Confirm who needs to plan
- Distribute planning database
- Develop service area plans
- Include budget requests (replace strategic proposals?)
- Try and secure project management training