

PALO ALTO COLLEGE COLLEGE PROCEDURES

Procedure Number: A.29.0
Procedure Title: Strategic Planning Process
Relevant Board/SACSCOC Policy:
Originating Unit: Dir. Strategic Initiatives
Maintenance Unit: Dir. Strategic Initiatives

I. Purpose: To outline Palo Alto College's strategic planning processes. This procedure identifies key phases of PAC's strategic planning timeline and discusses the processes in place that will result in the development of a completed 5-year strategic plan that is aligned with the college's mission and is represented throughout all levels of the institution.

II. Procedure statement:

In accordance with SACSCOC standards, PAC engages in ongoing, comprehensive, and integrated, research-based planning and evaluation processes that focus on institutional quality and effectiveness and incorporate a systematic review of institutional goals and outcomes consistent with its mission. In place are processes that cover development and review of a 5-year strategic plan, as well processes for addressing the alignment of the plan to all areas of the college.

A. Strategic Plan Period

1. Each strategic plan for Palo Alto is designed to run for five years beginning on September 1st of the initial year through August 31st of the terminal year of the plan. The plan is developed with clear and concrete strategic directions and goals to guide the institution during this period, while still allowing for adaptability. New plans for the college can be developed when:
 - a. The current plan is in its final year
 - b. A change in CEO for the institution results in the need for a shift in strategic priorities.

B. Mission Review

1. As outlined in Texas Educational Code Title 3, Section 51.359, Palo Alto College will develop a mission statement that reflects the three missions of higher education: teaching, research, and public service. Further, in accordance with

Board Policy A.1.3, regular review of the college's mission statement is an expectation of Palo Alto's Board of Trustees, and any modifications or reaffirmations to the current mission statement of Palo Alto college must be submitted for approval to the Board.

2. In accordance with PAC Procedure A.10, the college will determine the need to revise the mission statement of the college during the annual strategic planning retreat.
3. During the development of a new strategic plan, the college will send the mission statement for reaffirmation to the Board of Trustees, even if no revisions have been made to the mission statement.

C. Executive Research Team and College Leadership Team

1. The charge of the Executive Research Team is:
 - a. To review data related to the college's strategic plan and college action plans
 - b. To monitor progress of the college action plans and ensure their alignment with the mission and strategic plan of the college

The Executive Research Team will meet regularly to monitor all progress related to the college's strategic plan. Should potential issues in the plan be noticed during these reviews, recommendations for addressing them can be presented to the College Leadership Team ahead of the annual strategic planning retreat.

2. The College Leadership Team acts as the body approving any modifications to the strategic plan of the college. Any recommendations emerging from the Executive Research Team or strategic planning retreats are brought to the College Leadership Team for a vote.

D. The Strategic Planning Retreat – Development of a New Plan

1. The Strategic Planning Retreat is held annually and is the forum in which all aspects of the College's strategic plan are reviewed. The following sequence of steps will be followed during the retreat when developing a plan at the start of a five-year cycle:
 - a. A comprehensive environmental scan developed by PAC's Office of Institutional Research and Planning will be reviewed to provide

stakeholders with a landscape of the current trends within the community, among industry partners, and throughout the state and nation.

- b. A Strengths, Weaknesses, Opportunities, and Threats analysis, either conducted during the retreat or through a survey administered prior to the retreat, will be reviewed as part of a level-setting measure for the stakeholders to understand what the college family views as its priorities.
- c. Goals, measures, and targets related to the current strategic plan will be reviewed for applicability and effectiveness
- d. Progress on existing College Action Plans, which act as the implementation arm of the strategic plan, will be reviewed.
- e. The college's mission statement will be reviewed. Recommendations for affirmation of the statement or modifications can be proposed during the retreat.
- f. Based on the reviews of the above, college stakeholders will establish strategic directions for the college's strategic plan. These directions act as the focus areas for the college and should be based on specific elements of the college's mission. That is, the strategic directions should be statements that operationalize the college's mission statement. Strategic directions should be developed with the intent of lasting throughout the five-year cycle of the plan, but can modified if changes to the mission statement occur or another need arises.
- g. Based on the development of the strategic directions, goals for the plan should be developed for each direction in the plan. Goals represent what the college hopes to achieve during the five-year cycle of the plan.
- h. Where possible, measures and targets should be developed for each goal in the strategic plan. These should be developed using a specific metric, a baseline for that metric, and a target outcome that will occur at a specific point in time in the future. Targets should be set based on an annual time frame, and should be updated at each strategic planning retreat

E. The Strategic Planning Retreat – Review of Existing Plan

1. The following sequence of steps will be followed during the retreat when reviewing a plan that is still within its five-year cycle:
 - a. A comprehensive environmental scan developed by PAC's Office of Institutional Research and Planning will be reviewed to provide stakeholders with a landscape of the current trends within the community, among industry partners, and throughout the state and nation.
 - b. A Strengths, Weaknesses, Opportunities, and Threats analysis, either conducted during the retreat or through a survey administered prior to the retreat, will be reviewed as part of a level-setting measure for the stakeholders to understand what the college family views as its priorities.
 - c. Goals, measures, and targets related to the current strategic plan will be reviewed for applicability and effectiveness
 - d. Progress on existing College Action Plans, which act as the implementation arm of the strategic plan, will be reviewed.
 - e. The college's mission statement will be reviewed. Recommendations for affirmation of the statement or modifications can be proposed during the retreat.
 - f. Based on performance for the previous year, targets will be reviewed and a determination for updating the targets of each goal for the coming year will be made.
 - g. Based on the recommendations from the retreat, College Action Plans should be reviewed for relevancy, effectiveness, and need for additional plans.

2. All outcomes and recommendations from the strategic planning retreat will be compiled by the Director of Strategic Initiatives and sent out to the College Leadership Team for review. All modifications to the plan must be approved by the College Leadership Team ahead of the September 1st implementation date.

F. Development of College Action Plans

1. College Action Plans seek to:
 - a. provide a systematic approach to capturing those cross-college initiatives that are having an impact on the college's strategic plan
 - b. create a unified way of capturing the effectiveness of these initiatives, and documents the college's efforts to address the goals laid out in our strategic plan

College Action Plan development begins during the Strategic Planning Retreat and continues throughout the life cycle of the strategic plan. Development, documentation, and evaluation of these action plans should follow the College Action Plan form and presentation template.

Attachments: College Action Plan Implementation Form

Date Created: November 17, 2020

Date Updated/ Approved: December 15, 2020

(signed: Dr. Robert Garza)
President