



Strategic Planning Overview

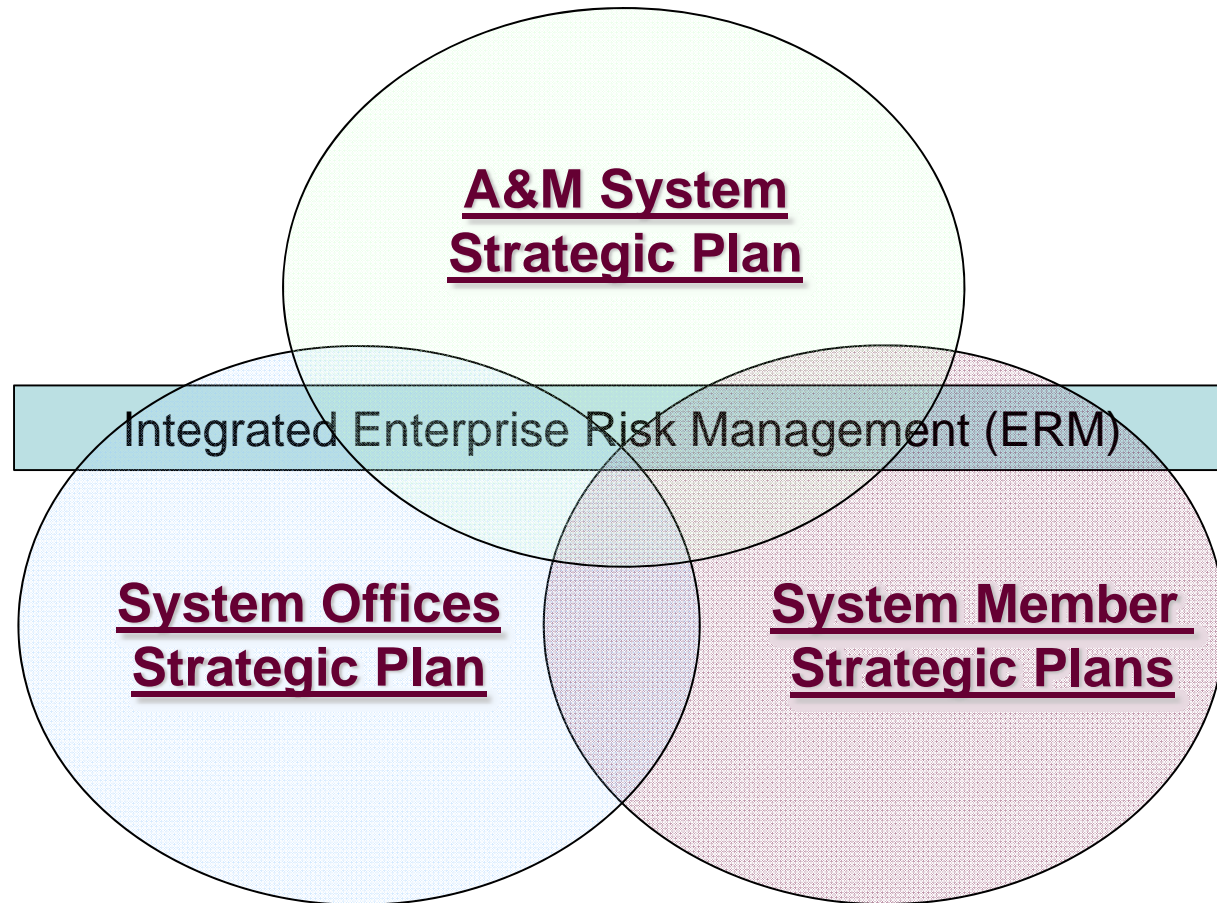


Strategic Planning

- Mission: Coordinate and facilitate aligning the strategic planning framework across The Texas A&M University System to improve synergy and enhance short-term and long-term decision making.
- System Coordinator
 - Shawn Andersson (sandersson@tamu.edu)
- System Members' Strategic Planning Coordinators
 - Selected by system member CEOs as point of contact for institution
 - List of coordinators available on website (<http://tamus.edu/offices/strategicplan>)



Strategic Planning Framework Elements



- Alignment & Synergy
- Accountability & Measured Results
- Communication, Collaboration, & Continuous Feedback
- Compliance with Policies/Regulations/Rules



System Policy 03.01

System Mission, Vision, Core Values & Strategic Planning

Section 4, Policy 03.01

The Strategic Planning Framework includes, but is not limited to, the following elements:

4.1 System Strategic Plan: The System Strategic Plan is the umbrella document that guides and aligns all planning for the system. It is certified by the Board of Regents (board). The chancellor will report annually to the board on the progress made in achieving the goals of the System Strategic Plan.

4.2 System Member Strategic Plans: Each system member will have a System Member Strategic Plan that aligns with the System Strategic Plan and recognizes and supports any unique strategic goals of the system member.

4.3 System Offices Strategic Plan: The System Offices Strategic Plan aligns with the System Strategic Plan and recognizes and supports any unique strategic goals of the System Offices.

4.4 Enterprise Risk Management: Enterprise Risk Management assesses and defines actions to be taken by the system members, the System Offices, and/or the system to identify, monitor, and mitigate risks that threaten the achievement of strategic plan goals and/or continuing operational programs.



System Policy 03.01

System Mission, Vision, Core Values & Strategic Planning

Section 5, Policy 03.1

RESPONSIBILITIES

5.1 The chancellor is responsible for the implementation of this policy and will establish strategic planning processes, procedures, requirements, and standardized terminology to achieve a coordinated, aligned, accountable, and sustainable Strategic Planning Framework. The chancellor will ensure that each element of the Strategic Planning Framework is aligned with the programmatic budget process. The chancellor will approve each strategic planning element defined above.

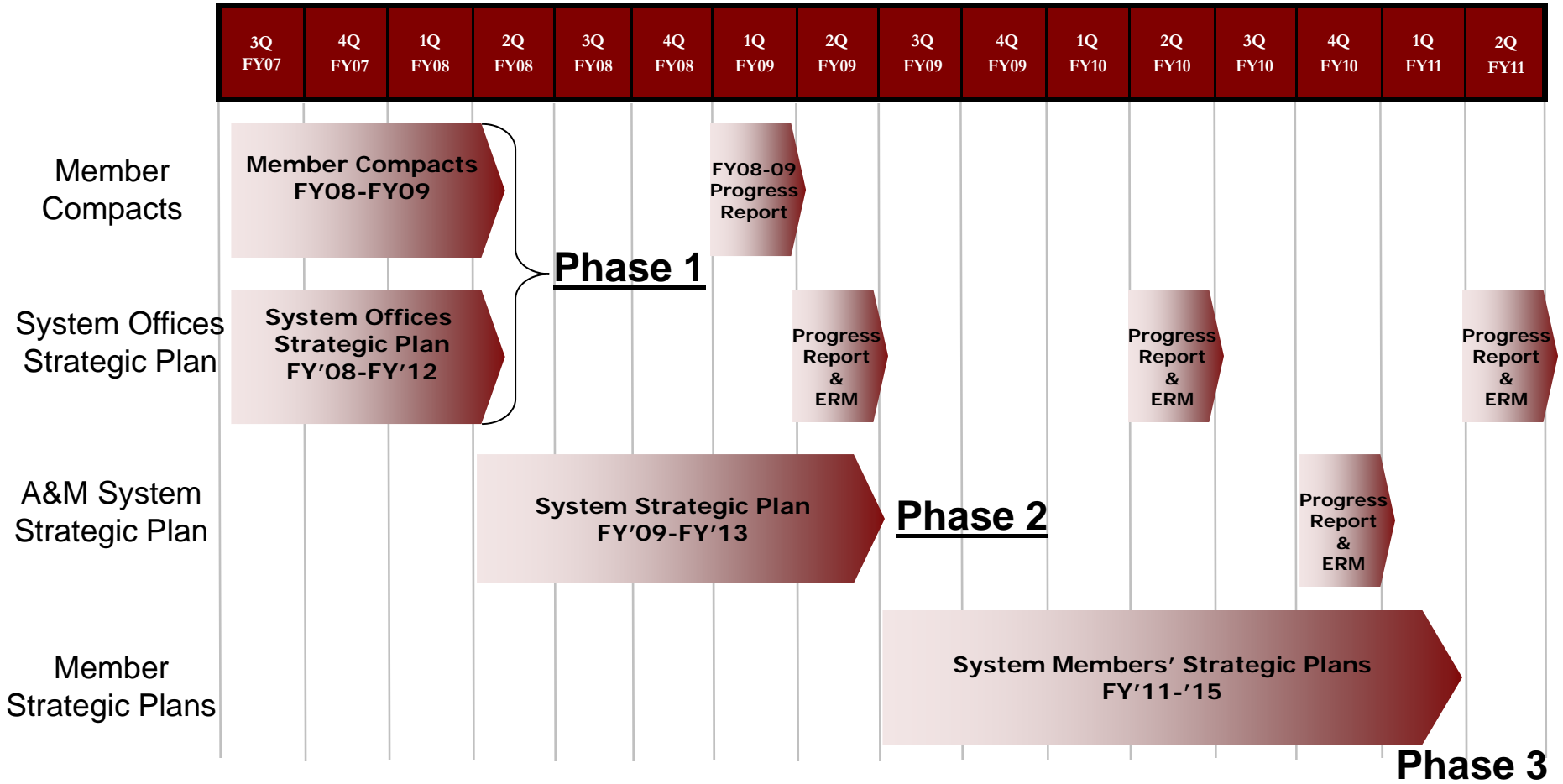
5.2 System member chief executive officers (CEOs) are responsible for implementation and monitoring of all strategic planning elements for their university, agency, or HSC. CEOs will submit their Strategic Plans to the chancellor for approval before they are finalized and published.

5.3 The Office of the Chief of Staff will provide leadership, oversight, guidance, and assistance in all aspects of the Strategic Planning Framework.



Strategic Planning Framework

Development Phases

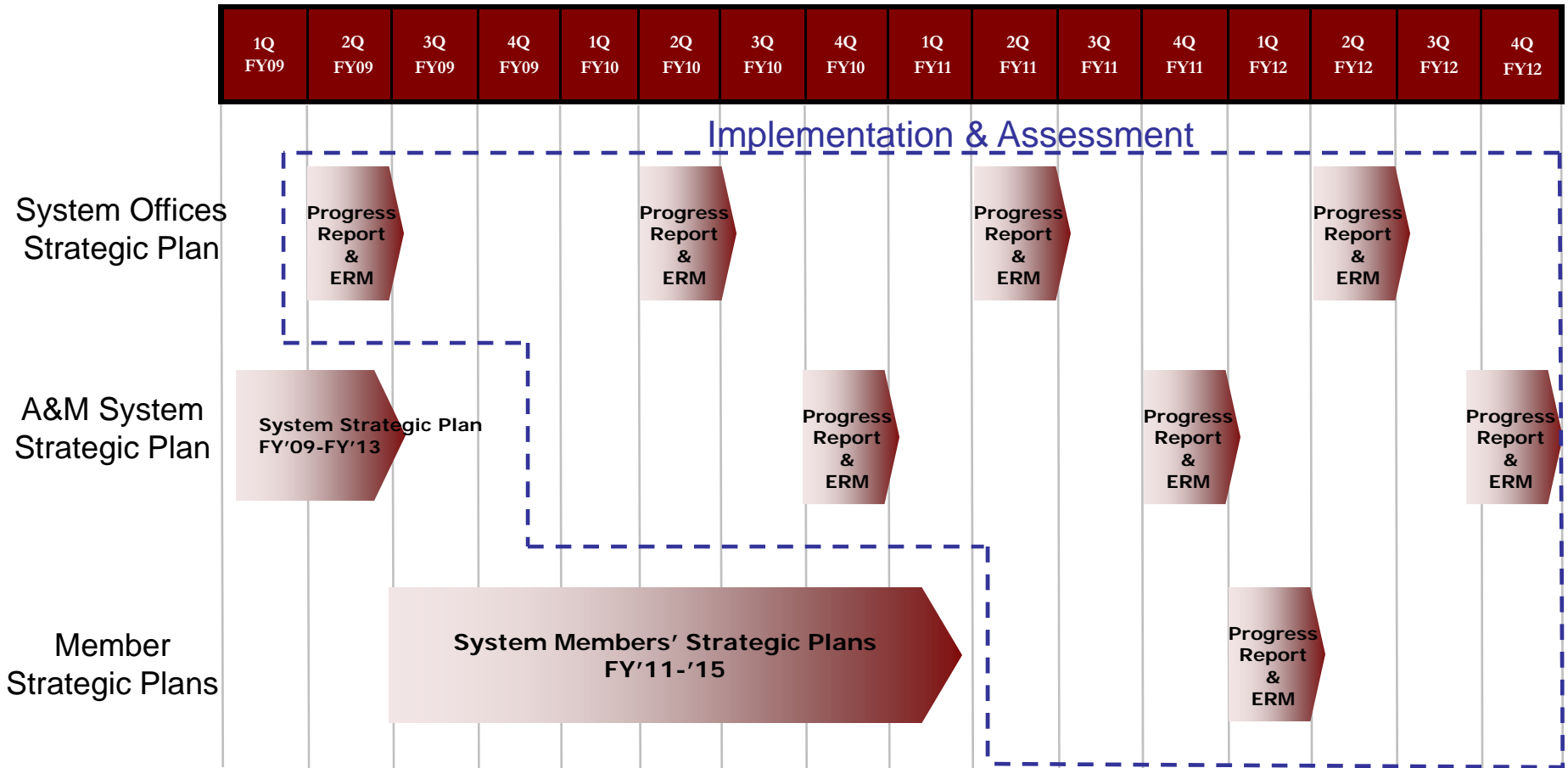




Strategic Planning Framework

Implementation and Assessment Phase

(Annual Progress Reports with integrated Enterprise Risk Management)





Strategic Plan Terminology

Strategic Plan: A strategic plan is a disciplined, coordinated, systematic, and sustained effort that enables an organization to fulfill its mission and achieve its vision. A strategic plan covers a five-year rolling timeframe. It links the mission to the vision. Strategic plans are reviewed annually to monitor progress and ensure alignment with other planning cycles. It establishes imperatives, goals, strategies, and performance measures for the organization that can be used as a management and communications tool.

Mission: The mission is a succinct statement of your organization's unique reason for existence. The mission statement defines who you are, what you do, and why you are doing it. The mission is linked to the vision by a strategic plan.

Vision: A vision is a guiding image of what success looks like. It answers the question what do you wish to become. It should be succinct, realistic, credible, well articulated, and easily understood by both internal and external stakeholders. It should orient people's energies, and serve as a guide to action. Because we will never be greater than the vision that guides us, it must stretch our expectations, performance, and aspirations. The vision and mission are linked to each other by a strategic plan. The vision and its strategic plan are not necessarily coterminous. In other words, it may take several iterations of a strategic plan to achieve the vision.



Strategic Plan Structure and Terminology



Imperative: Imperatives are overarching statements that require synchronization of effort. Imperatives are broad statements of intent. They answer the question what must your organization accomplish in support of a strategic plan. Each imperative has one or more goals.

Goal: Goals state the specific outcomes that you expect to accomplish in support of an imperative. Each imperative will have one or more goals. Each goal will have one or more performance measures. Additionally, each goal will have one or more strategies stating how the goal will be accomplished.

Performance Measure: A performance measure is a management tool that measures progress and results achieved. Performance measures are the proof of success or failure. Whether the performance measure is quantitative or qualitative is less important than the fact that it provides demonstrable evidence of progress. They describe what is to be measured and the methods of measurement. Performance measures are linked to a goal in a strategic plan. Each goal will have one or more performance measures.

Strategy: A strategy is the plan of action, method, process, or specific step taken to accomplish a goal in a strategic plan. They indicate how results will be achieved. Each goal will have one or more strategies.



System Member Strategic Plan Considerations

Flexibility

- Different Missions
- Different Visions
- Different Opportunities
- Different Challenges
- Different Stages in Planning
- Different Planning Models

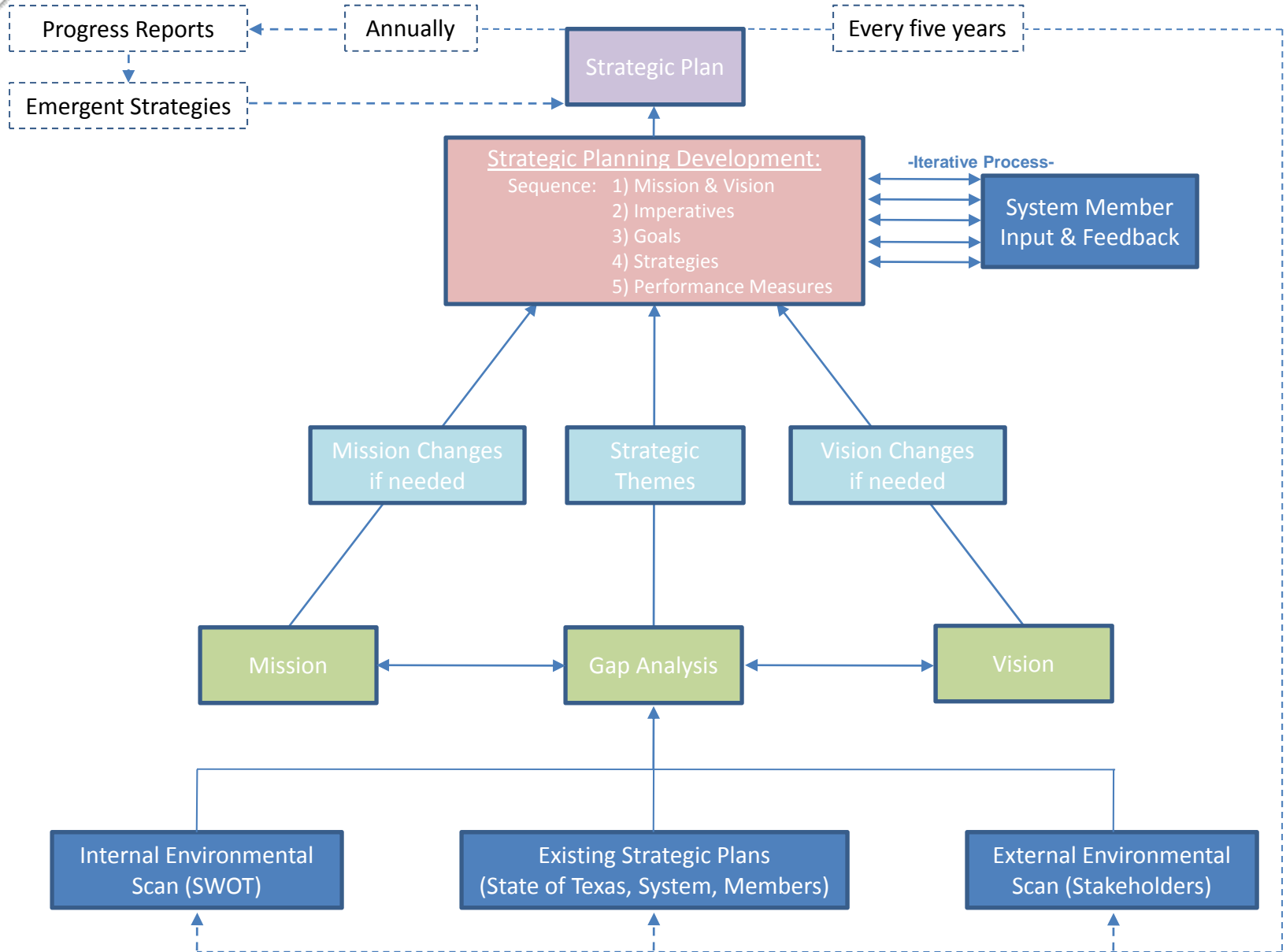
Commonality

- Terminology
- Strategic Plan Horizon
FY'11 – FY'15 (5 Years)
- Crosswalk between the
System Plan and Member
Plan as Applicable



A Strategic Plan Development Model

(A&M System Strategic Plan Example)





Strategic Plan Implementation and Assessment

Progress Report: Once strategic plans are developed, progress reports are to be completed as an annual status update and assessment tool. These annual progress reports should provide the following elements for each goal:

- Accomplishments
- Status of performance measures
- Incremental costs
- Risks associated with accomplishing the goal (see enterprise risk management below)
- New emergent strategies and/or other adjustments needed to the plan.

Guidance and templates will be provided to members annually for their strategic plan progress report.

Enterprise Risk Management (ERM): ERM serves as a management and communications tool that assists in reducing risks and improving the chances of success in the accomplishment of goals found in a strategic plan. In many cases, risks cannot be eliminated, but ERM enables us to manage them more efficiently and effectively.

We have worked closely with the System Internal Audit Department (SIAD) to simplify and standardize ERM information requirements that are integrated into the annual strategic plan annual progress reports:

- Risks - key threats that may prevent accomplishment of the goal.
- Mitigation activities - controls, programs, processes, or procedures in place to reduce the likelihood or severity of the risk.
- Monitoring activities - systems, reports, or executive reviews use to track and analyze the risks associated to the goal.



Strategic Planning Website

<http://www.tamus.edu/offices/strategicplan>

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Mission Statement

Coordinate and facilitate aligning the strategic planning framework across the Texas A&M University System to improve synergy and enhance short-term and long-term decision making. The strategic planning framework includes the System Strategic Plan, System Member Strategic Plans, System Offices Strategic Plan, System Member Compacts, and Enterprise Risk Management.

[Strategic Planning Overview](#) 


System Strategic Plan


[The Texas A&M University System Strategic Plan Fiscal Years 2009-2013](#) 

A&M System Member Strategic Plans

[A&M System Member Strategic Plans](#)

System Office Strategic Plan

[System Office Strategic Plan FY08-FY12](#) 

[System Office Executive Staff Goal Responsibility](#) 

Planning Calendars

[Strategic Planning Framework Timeline](#) 

[Member Strategic Plan Timeline](#) 