



December 2006

GUIDE FOR STRATEGIC PLANNING TASK FORCES

This document serves to guide strategic planning task forces in their work by:

- A. Outlining activities that each task force may undertake to accomplish their charge.
- B. Providing a report template that may be helpful in developing the task force report.

A. TASK FORCE ACTIVITIES:

- Develop goal statements for your assigned topic/issue based on discussion and brainstorming within the task force, as well as interactions with division employees and others as appropriate and consideration of their feedback.
- Draft an explanation/rationale for the goal.
- Present your draft strategic goals to the Strategic Planning Steering Committee and Senior Managers Group. The purpose of this step is to ensure that there is agreement as to the scope and nature of each task force charge and strategic goals before additional activities commence. Adjust or modify your strategic goals based on the feedback received.
- Once your strategic goals have been finalized, develop up to 5 draft objectives that will accomplish your strategic goals.
- Present your draft objectives to the Strategic Planning Steering Committee and Senior Managers Group. The purpose of this step is to ensure that there is agreement as to the scope and nature of the objectives before additional activities commence. Adjust or modify your objectives based on the feedback received.
- Once your objectives have been finalized, develop an action plan for each objective consisting of 6-8 prioritized items that need to be implemented in order to accomplish the objective. Include related costs if possible and the type of cooperation (internal and external) that will be necessary to accomplish the action.
- Compile all information into a draft task force report using the format provided in section B of this document and submit it to Business Planning and Improvement for compilation into a division report.

Here are two examples of goal statements, rationales/explanations, related objectives and action plans that may assist you in accomplishing the work of your task force.

	Goal Statement	Rationale/Explanation	Objectives	Action Plans
Example #1 (for Communication Task Force)	Create and implement effective, consistent and regular divisional communications for internal and external distribution	The division must engage in effective communications, both externally with campus constituencies, as well as internally among division staff to provide operational information and keep the campus apprised about the division's activities and services in support of the University's mission.	<ol style="list-style-type: none"> 1. Provide information to campus constituents regarding divisional activities and policies 2. Offer opportunities for campus constituents to communicate with the Vice President and senior managers 	<p>For objective #1:</p> <ol style="list-style-type: none"> 1. Publish a quarterly status report on divisional activities 2. Develop and implement a consistent policy creation process <p>For objective #2:</p> <ol style="list-style-type: none"> 1. Hold an open forum with the Vice President once each semester 2. Conduct annual customer satisfaction surveys
Example #2	Streamline administrative functions	If the University is to attract and retain outstanding students, faculty and staff, and provide excellent service, it must place the needs of the people it serves above internal considerations. As many organizations have found, an orientation toward those serviced is a vital link in building a caring, responsive organization. Our goals of building a community and student orientation are dependent on a user-friendly approach	<ol style="list-style-type: none"> 1. Organize service functions to focus on the needs of the user 2. Reorganize administrative structure 	See action items listed below

B. TASK FORCE REPORT TEMPLATE

Although task force reports might vary significantly based on the topic, some consistency might be helpful. Attached is a suggested template for submission of task force reports:

TASK FORCE REPORT

GOAL STATEMENT #1:

(Each task force may have up to 5 goals. Develop a goal statement for each goal. Number your goals 1.0, 2.0, 3.0 etc.)

Example: Streamline Administrative Functions

EXPLANATION/RATIONALE:

(Provide an explanation/rationale for each goal statement)

Example: If the University is to attract and retain outstanding students, faculty and staff, and provide excellent service, it must place the needs of the people it serves above internal considerations. As many organizations have found, an orientation toward those serviced is a vital link in building a caring, responsive organization. Our goals of building a community and student orientation are dependent on a user-friendly approach

OBJECTIVES AND ACTION ITEMS:

(For each goal statement, provide up to 5 objectives that must be accomplished to meet the goal. For each objective, develop up to 6-8 prioritized action items that must be accomplished to achieve the objective. Each action item should be coded with three codes that denote its priority, the type of cooperation needed to accomplish it, and anticipated funding.)

The following key provides the codes for the Priority, Action and Funding columns:

KEY

Priority: This code indicates the action's priority.

- 1 The task force feels that this action item should be addressed first
- 2 This item should be addressed as soon as possible

Action: The second code indicates the type of cooperation necessary to accomplish the action.

- I Can be accomplished internally
- E Implementation depends on external groups
- I, E Requires internal and external action

Funding: The third code provides a very rough estimate of cost. It is understood that full cost estimates will be completed during the implementation phase.

- (\$) Will save money
- 0 Can be accomplished using existing resources
- \$ Will cost less than \$100,000 to implement and maintain
- \$\$ Will cost more than \$100,000 to implement and maintain

The following are provided as examples only.

Objective 1.1 – e.g. Organize service functions to focus on the needs of the user.

Action Item	Priority	Action	Funding
1.1a Consider a consolidated service unit to coordinate and perform facilities construction and major renovation services. Conduct analysis to determine the specific units to include or exclude from this Consolidation.	1	I	0
1.1b Establish a student service center	1	IE	\$\$
1.1c With union representatives, explore the possibility of developing a calendar of holidays that coincides with the needs of the university's clients	1	IE	0
1.1d Define a process for measuring all service providers, with accountability tied to performance	1	I	0
1.1e			
1.1f			

Objective 1.2 – e.g. Reorganize administrative structure.

Action Item	Priority	Action	Funding
1.2a Closely coordinate all functions relating to the educational experience of students including academics, research and student life	1	I	(\$)
1.2b Establish clear lines of responsibility and Authority, linked to financial decision making	1	I	(\$)
1.2c Achieve accountability for performance, based on clearly defined goals	1	I	(\$)
1.2d Streamline the organizational structure of each division and build cross-division coordination to improve productivity, responsiveness and cost effectiveness	1	I	(\$)
1.2e Foster a working relationship based on teamwork recognition for achievement and a shared vision of the University's educational mission	1	I	(\$)
1.2f			

Objective 1.3 – _____

Action Item	Priority	Action	Funding
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1.3a

1.3b

1.3c

1.3d

1.3e

1.3f

Objective 1.4 – _____

Action Item	Priority	Action	Funding
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1.4a

1.4b

1.4c

1.4d

1.4e

1.4f

Objective 1.5 – _____

Action Item	Priority	Action	Funding
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1.5a

1.5b

1.5c

1.5d

1.5e

1.5f

Note: *Examples used above were adapted from the University of Connecticut's Implementation Plan for the Strategic Plan Beyond 2000: Change, 1995*

If you have questions or need assistance, please contact Cheryl Perreira, Director, Business Planning & Improvement at cperreira@fullerton.edu or extension 7295.