Alignment of Planning Detailed Process Flow

**Assumptions**
- Problems found in executing plans will be dealt with as close to the source as possible and elevated only if necessary.
- “Coordinated” Operational Plans means departments will work across the organization to communicate and develop plans in concert with one another.
- Functional Plans are not A3’s but rather take form within the Leadership Communications Tool.
- The current year A3 is used for the planning phase for next fiscal year.
- There are two significant checks each year. One in December ensures input to the next fiscal year budget. One in April/May extracts insights from the prior year that is fed back into the next strategic planning cycle.

**Key**
- Volatile, Uncertain, Complex, Ambiguous Factors
- Strategy Direction – Focus & Choices
- Strategy Integration – Resource & Systems
- Strategy Execution – Action & Impact

**Plan**
- Annual Strategic Planning Retreat: Review Grasp the “Situation” Synthesis
- Review IE Criteria
- Review Current Strategic Priorities
- Review Assumptions
- Review Develop Future Scenarios
- Solicit Board input during September Board Retreat
- Strategic Planning Development
- Draft Strategic Plan: Directions, Goals, Metrics, Targets, Resources
- Identify Prof. Dev. Needs & Priorities
- Employee Input on Draft Strategic Plan through “Leadership Team” Representative
- Do we have an ability to get the Resources Needed?
- Refined Draft 3-Yr Strategic Plan
- VP Master A3
- Department Leaders facilitate Development of Dept. and Individual A3’s
- Feedback from Strategic Leadership to Operational Leadership
- Strategic Leadership Reviews Leadership Tool
- Department Leadership work with Department to Revise Operational A3’s based on Top Down Feedback
- Revised Operational Plans (A3’s)
- Budget Discussions with BoT
- Draft Budget is Developed
- Budget is Approved
- Approved Budget Mattress Requested
- Budget

**Do**
- Execute Current Year Plan
- Regular Report on Metrics in Dept Meetings (Managing to A3’s)
- Plan Working?
- Yes
- No
- Resolve Issue Inter- or Intra- Department?
- Yes
- No
- Review & Determine Resolution with Appropriate Group
- Yes
- No
- Revisions to Strategic Plan Needed?
- Yes
- No
- Track Lessons Learned from Do, Check & Adjust in A3
- Updates
- Post A3’s to Central Repository
- Leadership Communications Tool (Organizational Level Planning “Year” of Goals to Strategic Directions)
- Annual Performance Review of Prior Year and Agree on Next Fiscal Year Goals

**Check & Adjust**
- Adjust Plan (A3)
- Yes
- No
- Quarterly Strategic Plan Review & Refinement
- Input to Grasp the “Situation” - Listen to Employees
- Portfolio Assessment