What is planning?

Planning is the way a program, unit, and area coordinate its resources and energies to accomplish its mission. It is also the process that enables a unit to determine where it is now, identify where it wants to be in the future, and create goals and objectives to move the unit, program, and area from where it is to where it wants to be. Planning is also how the activities of all programs, units, and areas of the college are coordinated so the college as a whole functions more efficiently. This section provides step-by-step instructions on how to develop the plan and complete the planning.

What are the basic steps to follow in the planning process?

The planning process consists of five steps:
1. Create a Planning Team
2. Things to do Before the Planning Team Develops a Plan
3. Develop a Plan and Complete the Planning Content
4. Communicate the Results of the Plan
5. Submit the Plan

Step 1: Create a Planning Team

The manager of the unit, program, and area initiates the planning process by creating a Planning Team, which collectively develops the plan. The Planning Team needs to be representative of the entire unit, program, and area. The team may also include individuals who are not part of the program, unit, and area, but whose input would help evaluate the program, unit, and area. Planning is a collaborative process. Therefore, this plan should not be developed solely by the manager. The members of the Planning Team have the following responsibilities:

- Active engagement in the process, including meetings, training, gathering information, soliciting input as appropriate, and preparing drafts.
- Collective recommendations about goals, objectives, and allocation priorities for existing resources at their level.
- Collective recommendations on issues and allocation priorities, which require review at higher planning levels.
- Seek input from appropriate sources that impact their operations and decision-making such as advisory committees, transfer institutions, and other planning committees through meetings, open forums, email messages, and/or other means.
- Gather information on the status of the implementation of the previous cycle’s plan.
- Communicate the planning process and its progress and the results to colleagues and constituents.
Step 2: Things to do Before the Planning Team Develops a Plan

Call the planning team together for an organizational meeting. At the meeting, do the following:
1. Review the college’s mission statement.
2. Review the college institutional goals, objectives, and key performance indicators
3. Review the program, unit, and area’s mission statement.
4. Review copies of the specialized plans (Technology, Facilities, and Academic Plans).
5. Distribute copies of all the plans submitted by the programs and evaluate the progress of the program, unit, and area as a whole over the past year.

Step 3: Develop a Plan and Complete the Planning Content

Below are recommended steps to follow when developing an annual program, unit, and area plan. Each section provides a short description of the topic and a series of questions. The questions do not have to be specifically answered, but rather are provided as a way to stimulate the thinking of the planning team and as means to help the team identify possible content for each section.