

Planning Activities University of the Pacific

Type of Activity	Description and Time Frame	Responsibility
<p>Strategic Planning – University Level</p>	<p>Strategic planning at universities occurs every five years or so. At University of the Pacific, the last strategic planning process concluded in 2007, resulting in Pacific Rising. President Eibeck announced in June, 2011 the need to develop a new strategic plan building on the strong foundation laid in <i>Pacific Rising</i>.</p> <p>The currently launched Strategic Planning Process will conclude with the approval of a Strategic Plan by the Board of Regents in October 2012.</p>	<p>The strategic planning process will be highly participatory and engage the creative thinking of the University community. It will be overseen by a Strategic Planning Committee chaired by Provost Pallavicini that reports to the Cabinet. A variety of Strategic Working Groups will engage around cross-disciplinary future trends and disciplinary trends facing our university and our students. The chairs of working groups will partner with the Strategic Planning Committee in developing strategies for the future.</p>
<p>Strategic Thinking</p>	<p>Strategic thinking occurs regularly within individual units at a university, such as academic departments, support and business units, the Cabinet, advisory boards, Presidential task forces and the Board of Regents. Some of these efforts result in formal plans (as referenced below), but all of the strategic thinking efforts enable the university to continuously improve and thrive.</p> <p>The strategic planning process for developing the new strategic plan will engage a broad set of faculty and staff, the alumni, students, and others over the next year.</p> <p>With a history of engagement in strategic thinking, the Board of Regents will play a key role in the development of institutional strategy. They will assist in the identification of institutional strengths and weaknesses, look to future opportunities that arise from the ideas of the faculty and institutional leadership, and help to make strategic choices as the strategies that will guide the University over the coming years take full shape.</p>	<p>In addition to the Strategic Planning Committee, the following groups will be or have been engaged in strategic thinking that will inform the next University strategic plan:</p> <ul style="list-style-type: none"> • Strategic Planning Working Groups to address the future of disciplinary and cross-disciplinary issues, finances and other areas • Academic leadership • Internationalization Task Force • Task Force for Diversity and Inclusive Excellence • Student Spirit Task Force • Budget Task Force for Examining Alternative Allocation Models • Students • Alumni Foundation Board and Advisory Boards • Cabinet • Board of Regents
<p>Strategic Planning – Unit Level</p>	<p>Units at the university, such as the schools, the Conservatory and the College, Student Life, Technology, Athletics, and other groups develop unit-based strategic plans that are aligned with the institution’s strategic plan. The current strategic plans will be a key part of the conversation in the University-level Strategic Planning process in 2011-2012. The next set of unit-level strategic planning will occur after the completion of the University-level Strategic Plan so that all plans at the university are aligned.</p>	<p>Unit level strategic planning is typically led by the head of the unit (vice president, dean, department or program head) but engages a broad set of faculty and staff in the unit to maximize the collective insights and wisdom of the group.</p>

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Strategic Financial Planning	An institutional strategic plan must not only identify strategic actions that will position the university for strength in the future, but must also adopt plans that are financially viable to implement. A Strategic Financial Plan will be developed in parallel with the Pacific's Strategic Plan, to shape the financial planning and resource allocation priorities that will be necessary to implement the new strategic plan. The principles espoused by Kent Chabotar in his book, Strategic Finance , will guide these efforts.	In Spring and Summer 2012, as part of sharpening the focus of the emerging Strategic Plan, a Working Group chaired by the VP for Business and Finance will craft a Strategic Financial Plan that will accompany the Strategic Plan that will be submitted to the Board in October 2012. Once the new Strategic Plan is adopted, the Pacific community will consider adopting an alternative budget allocation model recommended by the Budgetary Task Force to best empower the academic and support units to achieve our strategic goals.
Peer Institution Analysis	University of the Pacific has been identifying a set of institutional peers, both standard and aspirational, to enable benchmarking of our performance with other national universities similar to us. These will be in place in the Fall of 2011 and reviewed regularly. Peers for each school and the College are being developed, recognizing the distinctive characteristics of the various academic units. College and school peers should be identified when the academic units develop their next strategic plans.	The President's Advisory Committee and the Cabinet have the responsibility to develop the institutional peers. The deans and their faculty governance organizations, in partnership with the Provost, are expected to develop the academic unit peers. The Associate VP for Planning will be responsible for facilitating the peer institution process, providing benchmarked data, and embedding the peers in the Strategic Planning process as appropriate.
Core Identity, Brand and Marketing	In order to build the reputation necessary to attract the students, faculty and resources needed for success, a university must assure that its desired core identity (or brand) is consistent with what it actually offers to its constituents, and that marketing efforts are aligned with the core identity. Market research of external and internal constituent's perceptions of University of the Pacific will be conducted this academic year to inform us about the actual (vs. desired) perceptions of our identity.	The Associate Vice President for Marketing and Communications will conduct the market research on core identity. A task force to study Pacific Spirit this past academic year is providing evidence of current undergraduate students' perceptions of their experiences at Pacific.

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Academic Program Planning	Academic program planning is conducted regularly regarding academic programs, learning objectives, curricula, course offerings, research agendas, and other educational opportunities for students. Ideally, these planning efforts are aligned with the academic unit's strategic plan, which is aligned with the institutional strategic plan.	Deans, Department Chairs, Program Heads, and individual faculty are engaged in this process. The Academic Council and Provost review and approve some of these academic planning recommendations, and in the case of new academic programs, the President and Board must approve. The Associate Provost for Research and Graduate Studies is sometimes engaged in assisting with the planning efforts related to research.
Program Review and assessment of learning	Programmatic accreditation and review for individual academic and administrative programs occurs on a rolling basis. Program review provides the opportunity for an academic unit to reflect on its progress toward achieving its educational objectives for students, its progress toward its strategic plans, and ways it can improve its operations. In the case of the supporting units, program reviews allow reflection on their contributions toward institutional learning objectives and their strategic goals and continuous improvement opportunities.	Each Department, School or College, and each support unit are expected to prepare a self study and undergo program review according to a schedule maintained by the Provost Office and accountable to the President. The institutional-level review of the program review and assessment process occurs through the Institutional Effectiveness structure led by the Provost.
Strategic Enrollment Planning and Management	Strategic Enrollment Planning and Management is a continuous, annual function. It shapes operational and budget planning.	This function is led by the Provost, coordinated by the Associate Provost for Enrollment and in partnership with the deans of the academic units and Student Life.
Annual Planning and Budgeting	Each year, the budget process is initiated by a memo from the President that states the institution's annual priorities, which are aligned with the University's strategic plan. Annual budget requests from units are prioritized based on the alignment of their plans with the institution's annual priorities.	The Institutional Priorities Committee (IPC) is the budget and resource allocation advisory body that supports annual budgeting and resource allocation. The IPC is chaired by a faculty member, has the VP for Business and Finance as vice-chair, and is staffed by the Associate Vice President for Planning. The Budget Office oversees the budget allocation process. Ultimately, the budget is recommended by the President to the Board of Regents for their approval.

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Capital Planning	<p>University of the Pacific's Master Plan is updated every 5 to 7 years. Setting the priorities for upcoming capital projects (either constructing new or significantly modifying existing buildings) is guided by the master plan and is aligned with institutional strategies.</p> <p>Once new projects are identified every one or two years, planning occurs to identify the sources of funds for the project (bonding, gifts and/or operational funds) and its function and design.</p>	<p>Capital Planning is conducted by the Cabinet, the Facilities Committee chaired by the Vice President of Business and Finance and by the Board of Regents. Once a project is approved by the Board, then the university constituents impacted by the project work collectively to identify the programming and design of the project.</p>
Fund Raising Campaign Planning and Execution	<p>Fund raising campaigns are launched to raise funds for facilities, scholarships, program support and other uses. The compelling case made by a campaign is determined by the institution's strategic plan and the vision and big ideas associated with the future of the university.</p> <p>University of the Pacific's next comprehensive campaign will be shaped as the institution's strategic plan is completed. On an annual basis prior to (and during) the campaign, University Development is partnering with each of the academic units and programs to create and implement annual business plans that identify each respective program's fundraising goals and leading fundraising priorities.</p>	<p>The strategic plan will be the primary driver for planning and executing the next comprehensive campaign. Input from the deans, Cabinet and Regents will partner with the VP for University Development and the University Development team to create the case statement and raise funds for the campaign.</p>

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Regional Accreditation	<p>Regional accreditation occurs on a ten-year cycle. Accreditation teams often stipulate preferred approaches to strategic planning, resource allocation, institutional effectiveness and continuous improvement. A clear blueprint for aligning the different planning activities (as reflected in this matrix) is important for good governance of a university and is advocated strongly by WASC.</p> <p>University of the Pacific is in the midst of its WASC reaccreditation. WASC will conduct its Educational Effectiveness Review Visit (EER) in April 2012. The strategy, capacity building, alignment and institutional effectiveness elements of the proposed strategic planning process comport with WASC-preferred practices.</p>	<p>The Provost serves as the Accreditation Liaison Officer (ALO). WASC Accreditation committee structures are in place and engage more than 60 faculty and staff in six Inquiry Teams and the Steering Committee. The draft EER report is expected for review in September 2011, with the final report due to WASC in early January.</p>
Institutional Effectiveness (Continuous Improvement, Performance Management)	<p>Institutional effectiveness at University of the Pacific is a system of ongoing review of our effectiveness in both educating our students and in operating effective and efficient services and processes that support the learning environment. An Institutional Effectiveness Committee (IEC) will be formed as a university wide committee with a central role in the process to improve institutional effectiveness. The IEC charge is to evaluate the quality of program reviews and the adequacy of unit responses and action plan, identify challenges and opportunities to break down silos within and across campuses in the University, and review outcomes of program action plan at two year interval following program review.</p>	<p>New institutional effectiveness structures at the University of the Pacific are being developed for piloting in Fall 2011 with full implementation in Fall 2012. The planning activities are being led by the Provost. The members of the pilot IEC will be selected by the President from a slate of nominees put forward by Academic Council, the Council of Deans, ASUOP, Staff Council and administrative leadership. Membership includes 4 non-academic, 5 faculty, and 2 students. All three campuses are represented.</p>
Building of Organizational Capacity	<p>Organizational capacity is being developed continuously, shaped by the University's strategies and budgets. Areas of particular importance in capacity building for University of the Pacific include the effectiveness in operating as a distributed university of multiple campuses, building our fund raising capacity, creating a robust information technology structure to support the teaching and learning enterprise and implementing an enterprise wide risk management system.</p>	<p>Setting the overall environment, priorities, and resources for capacity building is the responsibility of the President and Cabinet and is delegated to the individuals, either within the normal management structure or through ad hoc committee assignments.</p>