

# BOARD PERSPECTIVES

## Strategic Thinking and Strategic Planning

Prepared By Montgomery College Board of Trustees • June 2011



# Montgomery College Board of Trustees

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## Introduction

A constant priority of the Board of Trustees is ensuring a stable and sustainable future for Montgomery College. During the past twelve months, strategic thinking and strategic planning for the College's future have been the cornerstones of the Board's goals and objectives. Beginning with the presidential transition and culminating with the presidential search for and inauguration of the College's ninth president — Dr. DeRionne Pollard, the Board has demonstrated its commitment to strategic planning. Moreover, the Board established strategic planning as one of the presidential goals and objectives and a focus of their ongoing conversations with Dr. Pollard, senior leadership and internal and external College constituents, which included faculty, staff, students, alumni, the Foundation Board and elected officials.

Upon concluding an introspective process to identify effective governance practices and promote engaged stewardship, the Board also took actions to restructure its monthly meetings, participate in trustee development, and develop its retreat agendas to be deliberative, to better define their role in the strategic planning process, and to authentically discuss institutional strategic priorities and planning. Collectively these actions coupled with Dr. Pollard's presidential priorities and activities have been critical for the Board gaining perspective to provide the president with a global view and context to engage in institutional planning. One outcome of these actions was the review and revision of the College mission statement, which now includes a vision and core values statement. A current and relevant mission, vision, and core values statement is the foundation for successful strategic planning.

The Board recognizes that a well developed process for planning is essential to documenting the College's view of its strengths, providing indicators of weaknesses and challenges, and addressing opportunities. It is the responsibility of the Board to charge the chief executive of the College with the task of leading the strategic planning process at the College. The role of the Board is to monitor progress of the plan development, approve the final Strategic Plan prepared by the President, and to ensure Plan updates as appropriate.

This report identifies the Board's role in institutional strategic planning and provides a set of broad goals for developing the College strategic plan.

### **Board of Trustees' Role and Responsibility in Strategic Planning**

The Board of Trustees determined that its primary role in the strategic planning process is to establish the broad goals for the process of developing the College plan. As a trustee governance practice, this entails:

- Articulating a conceptual framework for strategic planning that defines and shapes the institution's future course;

- Charging the president with the responsibility for leading the strategic planning process;
- Engaging in the development, review, and approval of the College mission, vision and core values;
- Monitoring the strategic plan development process;
- Reviewing and approving the strategic plan;
- Adopting policies to set parameters for effective planning;
- Aligning policy decisions with the strategic plan; and
- Ensuring and adopting a budget that supports the plan.

As directed by the Board, institutional planning should be led by the president and facilitated through an appropriately collaborative and inclusive process. As such, the Board has administratively and operationally delegated authority and responsibility to the president and other College staff to facilitate the process for developing the plan. These responsibilities encompass:

- Anticipating, identifying, and articulating future trends, challenges, and opportunities;
- Leading a visionary strategic planning process;
- Ensuring that the plan responds to the current and future educational needs of the community;
- Developing an innovative, entrepreneurial, and future-focused plan;
- Ensuring that College operations, priorities, and budgets are aligned with the plan; and
- Keeping the Board informed, through discussions at critical junctures, about institutional progress toward accomplishing the goals and objectives of the plan.

### **Board of Trustees’ Goals for Developing the Strategic Plan**

The Board of Trustees identified four broad goals for the College to accomplish in developing the strategic plan. These goals provide philosophical and practical criteria for the President to engage in long-range institutional planning. Principally the intent of the goals are to (a) establish essential parameters for the plan and (b) ensure that strategic planning is informed by environmental scanning and data on the social, economic, and political impacts and implications the College must consider in proactively preparing for the future.

The ultimate purpose of the strategic plan is to define and shape the future course of the College, and to provide a framework for allocating annual budget and other resources; to serve as an over-arching plan guiding and supporting other institutional plans; and for identifying strategic priorities, based upon relevant data and information upon which current

and new College initiatives can be justified. Therefore, the plan must clarify the College's future priorities. The specific goals are:

1. Conduct an environmental scan and a strengths, weaknesses, opportunities and threat (SWOT) analysis of the College to inform planning. The SWOT analysis should include projections of:
  - Demands on the college (e.g., types of students, workforce needs, needs for non-credit courses, growth of the workforce and growth within different parts of the County);
  - Some assessment of the success and lack of success in various College programs;
  - College resources needs (e.g., classroom and lab space, likely State and County financing, other sources of funds); and
  - Broad opportunities and threats (e.g., traffic, growth of technological solutions, availability of skilled faculty and staff). The analyses should be sensitive to relevant distinctions in thinking about remedial/developmental education programs, general education requirements and STEM course offerings.
2. Identify a set of five broad strategic goals that define the ways in which the College envisions itself evolving by 2020.
3. Address, in particular, what the College will do to pursue and ensure institutional innovation, entrepreneurialism, and other untapped opportunities.
4. Develop a multi-year strategic plan, which identifies specific strategies to reach those goals. This will serve as the primary document that defines the College's priorities going forward.

### **Final Board Perspective**

While this report reflects the Board of Trustees' perspectives and goals regarding institutional planning, it is also our hope that the entire Montgomery College community will engage in strategic, innovative, and future-focused thinking. With a sense of urgency for the future, we encourage you to participate in planning to develop tactical strategies that will position Montgomery College as a national model of educational excellence, opportunity, and student success.