



STRATEGIC PLANNING METHODOLOGY

| | Step 1 Initiate & Understand (Governance & Scope) | Step 2 Assess Current State (Internal & External) | Step 3 Design (Workshops/ Facilitated Sessions) | Step 4 Write (Write, Validate & Approve) | Step 5 Communicate (Educate all Stakeholders) | Step 6 Implement (Implement, Report & Evaluate) |
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| Timeframe | 9-12 months before end of existing strategic plan | 6-9 months before end of existing strategic plan | 3-6 months before end of existing strategic plan | 3 months before end of existing strategic plan | 1 month before end of existing strategic plan | Upon completion of approved strategic plan |
| Process | <p>Why is a strategic plan required? (e.g. to identify goals of the unit; set achievement expectations; any accreditation requirements)</p> <p>Define governance: those responsible for strategic planning and its implementation</p> <p>Define scope: What aspects are being reviewed: mission, vision, values, strategic priorities, strategic goals, supporting actions, outcome measures What steps in the process are required to meet the goal?</p> | <p>Needs assessment, surveys, consultations</p> <p>Review and determine alignment with UofM Strategic Plan, Rady Faculty Strategic Framework, College Strategic Plan(s), as applicable</p> <p>SWOT analysis (strengths, weaknesses, opportunities and threats) or SOAR analysis (strengths, opportunities, aspirations, results) Review of benchmarking/ best practices</p> <p>Review of accreditation standards, as applicable</p> <p>Consultation with stakeholders</p> | <p>Identify critical issues</p> <p>Set strategic priorities, establish goals, understand implications</p> | <p>Write strategic plan content / strategic priorities</p> <p>Identify targets, outcome measures</p> <p>Revise and validate through stakeholders</p> <p>Approved by appropriate approval bodies</p> | <p>Strategic plan content adapted to graphically designed document</p> <p>Determine communication of strategic plan</p> | <p>Develop and complete implementation strategy/operational plans</p> <p>Identify reporting mechanisms (documented reports; meetings where reports will be presented)</p> <p>Complete implementation reports / operational plan reports</p> |
| Responsibility / Supporting Unit | Unit, in consultation with Director, Planning & Priorities | Unit, with guidance/assistance from OEFD | OEFD, as time/resources allow (may require external facilitator) | Director, Planning & Priorities / Unit | Rady Communications & Marketing | Unit, with guidance/assistance from IAU |
| Output(s) | Brief scope/project document | Collated current state assessment document (used as background material for workshop) | Workshop Facilitation report provided by OEFD | Strategic Plan document content | Graphically designed and approved Strategic Plan document, posted on website. Communicate to all stakeholders | Implementation Report / Operational Plan Reports |

Strategic Planning Methodology

Strategic planning is a process that takes time, effort and stakeholder input, and should not be left until the “last minute”. In order to take advantage of, and have access to, the available supports within the RFHS that can assist with strategic planning, lead-time is needed, as set out in the timeframes above.

Step 1 (Governance and Scope)

A Unit may require a strategic plan for any number of reasons. Consideration should be given to whether a Unit-specific strategic plan is needed, how it will align with the University of Manitoba Strategic Plan, the Rady Faculty of Health Sciences Strategic Framework, as well as any applicable College plans. The Director, Planning & Priorities, can provide consultation to the Unit respecting need, scope and required steps in the process.

Steps 2 and 3 (Assessment and Design)

The Office of Educational and Faculty Development (OEFD) can assist the Unit with internal/external assessments as well as design of the strategic plan, including facilitation of workshops/retreats, should time and resources allow. Ideally, a strategic plan facilitator should be familiar with the business of the Unit, in order to provide meaningful input, relevant guidance in the process, and help lead the discussion so the goal setting processes align with the Unit’s context and desired outcomes.

Step 4 (Write)

Once a facilitation report is complete, the Director, Planning and Priorities can assist the Unit with writing the strategic plan (the Director should attend any workshops/retreats, if writing assistance will be requested).

Step 5 (Communicate)

Rady Communications & Marketing will copy edit and design the strategic plan ensuring it adheres to University of Manitoba and Rady Faculty branding guidelines, visual identity and communications standards. Rady Communications & Marketing will also lead comprehensive, multi-platform strategic communication of the strategic plan to stakeholders.

Step 6 (Implement, Report and Evaluate)

A strategic plan will be a useful tool and resource only if it is operationalized within the Unit. Responsibility for the strategic plan and its implementation rests with the Unit. The Integrated Accreditation Unit (IAU) can provide advice to the Unit on set up of implementation/annual operational plans and assist with tracking mechanisms.