

## **Strategic Planning at a Small College - Executive Overview**

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In 1994, Baldwin-Wallace College produced a Strategic Plan for Information Technology. This plan mandated changes in the influx of technology, the structure of IT, and technology committees. The published plan included the organizational structure of the College, a SWOT analysis (strengths, weaknesses, opportunities, and threats), ten proposed strategies with accompanying initiatives, specifications for campus networks and systems, an equipment inventory, and various appendices. As a result of the plan an Information Technology Strategic Planning Committee (ITSPC) was formed. The ITSPC met regularly and technology issues were discussed; however, the plan was not reviewed annually or updated.

In 1999, the College began a strategic planning process for the entire institution. By October 2000, a plan was approved by the Board of Trustees and then presented to all campus constituencies. More than one of the initiatives specified in the College's strategic plan related to changes and improvements in the area of information technology.

Late in 2001, the President appointed ITSPC as the steering committee that would begin work on redrafting a strategic plan for information technology, thereby addressing the defined goals of the College's plan. The previous IT plan was reviewed, a preliminary time schedule was set, and a suggested course of action was determined. It was agreed that first and foremost, the Baldwin-Wallace College Strategic Plan needed to be the starting point to address issues mandated there. Furthermore, the plan needed to be linked with financial initiatives and priorities, with choices made based on how placement of resources would enhance the educational program at the College.

The first official meeting of the steering committee was held on December 18, 2001. A decision was made that the IT Office Manager would attend all meetings relating to the Strategic Plan to document minutes, coordinate data, and assist in the writing process. The second matter at hand was the small group vs. large group concept in strategic planning. The steering committee felt that it would serve in a capacity of gathering information, establishing goals, and steering the process. A larger group, called the Strategic Plan Task Force, would be created with representation from all areas of the College to offer a broad campus perspective.

The steering committee presented a list of possible Task Force members to the President who then created the Task Force, adding two College trustees to the group. The Task Force participants would eventually be broken into smaller focus groups to concentrate on specific areas or topics. It was determined that the Task Force would meet on a monthly basis with duties assigned between meetings. The steering committee would meet bi-weekly to monitor progress.

One lingering consideration was whether or not to hire a consultant familiar with the strategic planning process to assist with the task at hand. This option worked out very well during the 1994 Strategic Plan by giving it structure, as well as an outside, non-biased perspective. An outside consultant, Linda Fleit, President of Edutech International, was engaged to oversee the project and lead the kickoff meeting.

On January 18, 2002, the first official meeting of the Information Technology Strategic Plan Task Force has held. The President started the meeting by thanking the Task Force members for their interest and participation. The consultant made a presentation to the Task Force, outlining the strategic planning process, correct SWOT analysis procedures, how to develop strategies and initiatives, avoiding pitfalls, and how to strive for balance.

Following the meeting, a charge was given to each Task Force member to go back to his or her area on campus and form a focus group(s) comprised of other users from that department or division, perform a SWOT analysis, and gather data. Members were given five weeks to perform this task and submit the results to the steering committee. To assist in the process, a member of the steering committee led each of the focus group sessions in order to facilitate discussion. (Note: the Director of IT was not present at any focus group sessions in order to guarantee open and honest communication regarding technology issues on campus.)

All data submitted to the steering committee was combined and sorted by SWOT category. Patterns emerged with regard to specific topics. These broad topics were identified as the primary areas of analysis, which would ultimately lead to the development of strategies for the plan. The areas of analysis identified were:

- Campus-wide Training and Faculty Development
- Delivery of Information Services
- Coordination of Systems
- Internal and External Web Usage
- Adopting Newer Technologies
- Academic Assimilation of Technology
- IT Resource Procurement

The steering committee determined that separate sub-committees could best examine these areas. Each Task Force member was assigned to participate on one of the seven sub-committees and a group leader was chosen. Each sub-committee was provided with a comprehensive list of the data collected on that topic. The charge to the sub-committee was to analyze the data, identify most frequently listed issues or areas of serious need, and begin to formulate strategies to address these needs.

The Task Force reconvened on a monthly basis to share progress and keep on track. Attempts were made to identify any area that had been inadvertently omitted. At each meeting, the work presented by each group was discussed and suggestions for modification and revision were offered and implemented. An internal IT strategic plan website was also created to post documents and updates for review by committee members.

By May 2002, each group had narrowed its focus to one global strategy that most appropriately encompassed that area of concern. At this time, the groups were asked to begin developing initiatives that would support the strategy. Due to the academic calendar, the groups were given until the end of August to complete this task, with the Task Force scheduled to meet again in early September 2002. In the months of September and October, the sub-committees worked on finalizing initiatives and adding rationale for each. An eighth area was added which addressed implementation of the plan, regular updates to the plan, and monitoring both internal and external events related to information technology.

By November 2002, a draft document of the Strategic Plan was ready and made available to the campus. Divisional academic meetings were held to review the plan and gain additional faculty input. The plan was presented and discussed at the Student Senate meeting and other student groups were contacted with regard to their comments and concerns. Three open forum sessions, led by the President, were held in December and were open to all faculty and staff members.

Upon completion of these public presentations, the final draft of the plan was prepared. A budget was created to forecast expenditures that were outside the normal IT costs. In late January 2003, it was presented to the Task Force and received approval for submission to the President's Council and the Board of Trustees in early March.