Planning at the College of Southern Idaho is:

- Ongoing
- Cyclical
- Participatory
- Data-driven and integrated with fiscal and legislative processes
- Based on CSI’s mission and core themes, Northwest Commission on Colleges and Universities (NWCCCU) standards, State Board of Education (SBOE) and Division of Financial Management (DFM) published guidelines, and SBOE strategic plan
- Widely communicated
- Periodically reviewed and revised as necessary (timeline and processes)
Planning is a Three-Pronged Process…

**Prong 1**

Institutional Planning is driven by the Office of Institutional Planning and Grants Development, with input from stakeholders, and with help from Strategic Planning Committee members and employees assigned to collect and analyze performance measure data. It consists of environmental scanning, annual review and (as necessary) revision of the Strategic Plan (mission, vision, values, core themes, strategic initiatives, goals, objectives, performance measures, and benchmarks), and the development of the Annual Performance Report. The CSI Board of Trustees review and approve the Strategic Plan. Strategic Planning Committee and subcommittee members with campus-wide input and participation from faculty, staff and students lead the implementation of the Strategic Plan. Progress made towards achieving the plan is monitored, documented, and shared with appropriate constituents.

Institutional Planning provides the framework for the Department and Division Development Planning process. Parallel to Institutional Planning during the fall and winter, Individual Development Plans (IDPs) are developed by faculty and staff for submission to unit leaders. Based on Individual Development Plans (IDPs) and guided by the Strategic Plan and unit goals and objectives unit leaders develop Unit Development Plans (UDPs). UDPs must demonstrate how the unit contributes to the accomplishment of the College’s mission and strategic plan.

**Prong 2**

**Prong 3**

Institutional Resource Allocation is driven by administrative priorities established based on the current Strategic Plan and Unit Development Plans (UDPs).
Planning is Ongoing…

College of Southern Idaho Planning Process

- CSI Mission Vision
- Core Themes
- Strategic Initiatives

- Resource Allocation
- Institutional Goals & Objectives
- Unit Plans (UDP)
- Individual Plans (IDP)
Planning is Ongoing...
Planning is Ongoing…

**Legend**

- Borders:
  - CSI Board of Trustee Review/Approval
  - Administrative Council Review/Approval
  - Student/Faculty/Staff/Admin Input/Participation
  - Budget
  - Legislative

- Boxes:
  - Institutional Planning and Grants Development Office
  - Employees Assigned to Collect and Report Performance Measure Data
  - Planning Committees
  - President’s Office
  - Administrative Council
  - Office of Administration
  - Office of Instruction
  - Faculty and Staff
  - Unit Leaders
  - SBOE
  - DFM and/or the Governor’s Office
  - LSO

**Acronyms**

- SBOE - State Board of Education
- OSBE - Office of State Board of Education
- DFM - Division of Financial Management
- LSO - Legislative Services Office
- MCO - Maintenance of Current Operation
### Implementation of the Strategic Plan continues

- **Environmental assessment, planning retreat, subcommittee work**
- **Unit leaders review the Strategic Plan and start the Individual Development Plan (IDP) process by sharing with their employees its purpose, process, timeline, and forms to be used**
- **Faculty and staff work on their Individual Development Plans (IDPs)**
  - **Unit leaders collect and review Individual Development Plans (IDPs) and, as feasible and necessary, meet with employees individually to discuss their development plans**
  - **Develop Unit Development Plans (UDPs) based on Strategic Plan, division goals and objectives, and Individual Development Plans (IDPs)**
  - **Participate in regional higher education meetings to draft a regional plan for academic and professional-technical program offerings over the next 8 years**
  - **Meet with other institutions in the region to conduct statewide needs assessment for academic and professional-technical program offerings over the next 8 years**
  - **Updated Strategic Plan is presented to the CSI Board of Trustees for their review and approval**

### Prioritize institution needs and allocate resources

- **Review and update (as necessary) Strategic Plan**
- **Develop administrative priorities**
- **Develop division goals and objectives**
- **Submit proposed performance measures and benchmarks for the next fiscal year for review/approval by SBOE**

### Collect, calculate, and analyze required performance measure data and submit to Institutional Planning & Grants Development Office

- **Submit the updated Strategic Plan to OSBE prior to the April agenda cutoff date**
- **Submit the draft 8 year plan for academic and professional-technical program offerings to OSBE**
- **Submit legislative ideas, suggestions, and estimated line items to OSBE prior to the June agenda cutoff date**
- **Submit estimated Maintenance of Current Operations (MCO) budget to OSBE prior to the August agenda cutoff date**

### Final 8-year plan for academic and professional-technical program offerings presented to SBOE for approval

- **Institutions meet to coordinate and finalize their 8 year plan for academic and professional-technical program offerings for presentation to SBOE in August**

### Implementation of the updated Strategic Plan begins

- **Write and submit Annual Performance Report to OSBE**
- **Submit updated Maintenance of Current Operations (MCO) budget to OSBE prior to the August agenda cutoff date**
- **Final 8-year plan for academic and professional-technical program offerings presented to SBOE for approval**
- **Final changes to bills (legislative proposals) are submitted for SBOE approval**

### Implementation of the updated Strategic Plan

- **Faculty and staff work on their Individual Development Plans (IDPs)**
- **Unit leaders collect and review Individual Development Plans (IDPs) and, as feasible and necessary, meet with employees individually to discuss their development plans**
- **Submit the updated Strategic Plan to OSBE prior to the April agenda cutoff date**
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**Planning is Ongoing…**
Planing is Ongoing...

**October – February**

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<td>Faculty and staff work on their Individual Development Plans (IDPs)</td>
<td>Proposed legislation in bill format returned by LSO to OSBE for review and final changes</td>
<td>Review and update (as necessary) Strategic Plan</td>
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<tr>
<td>Start preparing for legislative presentation</td>
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<td>Develop administrative priorities</td>
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<td>SBOE reviews performance data submitted for the previous year</td>
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<td>Develop division goals and objectives</td>
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<td>Proposed legislation is approved by SBOE</td>
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<td>Develop Unit Development Plans (UDPs) based on Strategic Plan, division goals and objectives, and Individual Development Plans (IDPs)</td>
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<td>DFM forwards proposed legislation to LSO</td>
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<td>Participate in regional higher education meetings to draft a regional plan for academic and professional-technical program offerings over the next 8 years</td>
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Implementation of the Strategic Plan continues

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Implementation of the updated Strategic Plan begins

Prioritize institution needs and allocate resources

- Updated Strategic Plan
- Implementation of the updated Strategic Plan begins
- Prioritize institution needs and allocate resources

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<td>SBOE reviews and approves its updated strategic plan</td>
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<td>SBOE establishes required performance data reporting for institutions and agencies</td>
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**Implementation of the Strategic Plan continues**

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- Updated Strategic Plan
- Implementation of the updated Strategic Plan begins
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**October – February**

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- Implementation of the updated Strategic Plan begins
- Prioritize institution needs and allocate resources

Implementation of the Strategic Plan continues
### Planning is Ongoing…

### March – September

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<tr>
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<td>SBOE reviews and approves the updated <strong>Strategic Plan</strong></td>
<td>Submit the draft 8 year plan for academic and professional-technical program offerings to OSBE</td>
<td>SBOE reviews and approves legislative ideas, suggestions, and estimated line items to OSBE prior to the June agenda cutoff date</td>
<td>SBOE reviews, approves, and provides guidance concerning proposed legislative ideas</td>
<td>DFM publishes the <strong>Strategic Plan</strong> to its website at <a href="http://dfm.idaho.gov">http://dfm.idaho.gov</a></td>
<td>Submit estimated Maintenance of Current Operations (MCO) budget to OSBE prior to the August agenda cutoff date</td>
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<td>Submit proposed performance measures and benchmarks for the next fiscal year for review/ approval by SBOE</td>
<td>SBOE is briefed on next fiscal year’s legislative appropriations and new legislation that impact SBOE governed agencies and institutions</td>
<td>SBOE provides budget guidelines (including line items)</td>
<td><strong>DFM publishes the <strong>Annual Performance Report</strong> to its website at <a href="http://dfm.idaho.gov">http://dfm.idaho.gov</a></strong></td>
<td><strong>Institutions meet to coordinate and finalize their 8 year plan for academic and professional-technical program offerings for presentation to SBOE in August</strong></td>
<td><strong>Governor’s Office and DFM review legislative ideas</strong></td>
<td><strong>OSBE begins development of approved legislative ideas into draft legislation (as appropriate)</strong></td>
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<td>Meet with other institutions in the region to conduct statewide needs assessment for academic and professional-technical program offerings over the next 8 years</td>
<td>Collect, calculate, and analyze required performance measure data and submit to Institutional Planning &amp; Grants Development Office</td>
<td><strong>OSBE submits Legislative Ideas to DFM</strong></td>
<td><strong>DFM publishes the Annual Performance Report to its website at <a href="http://dfm.idaho.gov">http://dfm.idaho.gov</a></strong></td>
<td><strong>Submit legislative ideas, suggestions, and estimated line item requests</strong></td>
<td><strong>Final 8-year plan for academic and professional-technical program offerings presented to SBOE for approval</strong></td>
<td><strong>Proposed (final draft) legislation submitted to DFM</strong></td>
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**Implementation of the Strategic Plan continues**

**Prioritize institution needs and allocate resources**