

# **Strategic Planning Methodology and Monitoring Mechanisms of the University of Georgia**

## **1. General Provisions**

- 1.1 Strategic planning at the University of Georgia is a participatory process and involves the university's academic and administrative staff, students, employers, and other stakeholders.
- 1.2 Strategic planning includes strategic documents: Developing/making adjustments to the long-term (7-year) strategic plan and short-term (3-year) action plan.
- 1.3 Strategic documents (strategic development and action plans) include all aspects necessary for the functioning of the University of Georgia: Educational, scientific, and institutional development.

## **2. The process of developing a strategic plan**

- 2.1. The Partners' Meeting sets out the main directions and aspects of the University's mission and vision, and the first draft of the documents, which is submitted to the Rector of the University for consideration by the Board of Rectors.
- 2.2. The Board of Rectors makes recommendations, amendments, and additions to the said draft and returns them to the Partners' Meeting for consideration.
- 2.3. The Partners' Meeting reviews the recommendations of the Board of Rectors and approves the final version of the mission and vision.
- 2.4. The Rector ensures communication of the University mission and vision to the University community.
- 2.5. Based on the mission and vision of the University, taking into account the current situation, the Board of Rectors will develop a competitive strategy for the University and set strategic goals.
- 2.6. Following the strategic goals of the University, the Vice-Rectors, and the school principals, in communication with the heads of the structural units subordinated to them, academic staff, students, potential employers, and other stakeholders, set goals and sub-goals, develop their implementation strategy, performance indicators, performance deadlines and identify the structural units responsible for performance.
- 2.7. The draft strategic plan is approved by the Rector's Board, which the Rector will finally submit to the Partners' Meeting for approval.
- 2.8. The strategic plan is made public (available on the university website).
- 2.9. Vice-rectors, school principals, heads of departments/services, heads of other structural units provide the introduction and dissemination of the strategic plan to the employees.

## **3. The process of developing an action plan**

- 3.1. Based on the strategic plan of the University, the structural unit responsible for the implementation of each goal/sub-goal will develop the stages/objectives of the goal/sub-goal, tasks, activities to be implemented, indicators of their implementation, deadlines, persons/structural units responsible for implementation.

- 3.2. The tasks, activities, etc. written by each structural unit are given the form of a Gantt chart and are integrated into the 3-year University Action Plan.
- 3.3. The Board of Rectors approves the University Action Plan.
- 3.4. The action plan is made public (available on the university website).
- 3.5. Relevant services ensure the introduction and dissemination of the action plan to the employees.
- 3.6. The tasks/activities defined in the action plan are placed in the UG-Online system and are visible to both the person responsible for the implementation and his/her superior.
- 3.7. The person responsible for the implementation of the tasks/activities defined in the action plan is obliged to indicate the stage of the task/activity (in percentage-expressed steps) daily through the UG-Online system.

#### **4. Strategic planning phases**

4.1. Strategic planning is a cyclical process and includes the following phases:

1. Defining mission and vision
2. Analysis of the current situation:
  - Resource analysis
  - Analysis of internal and external factors
  - Market analysis
  - Competitors analysis
3. Developing a competitive strategy
4. Defining strategic long-term goals
5. Defining goals and sub-goals
6. Developing an action plan
7. Monitoring the implementation of the strategic and action plan, responding to the results

#### **Defining mission and vision**

##### **Mission and Vision of the University of Georgia**

The mission of the University of Georgia is a short statement about what it does, what it wants to achieve, what principles it is based on, and for whom it benefits.

The vision of the University of Georgia is an accessible image of the desired future. It is an inspirational coordinating landmark where the university community yearns for teamwork.

#### **Analysis of the current situation**

The Board of Rectors analyzes the current situation, examines the existing potential of the University: The resources, strengths and weaknesses, opportunities and threats at its disposal; considering environmental factors, its economic, social, legal, technological, etc. aspects, the market and the state of the university in the market.

Analysis of the current situation:

1. Resource analysis
2. Analysis of internal and external factors (SWOT-analysis, PEST-analysis)

3. Market analysis (demand and supply analysis)
4. Competitors analysis

### **Developing a competitive strategy**

Taking into account the strengths of the university, competitors, market, internal and environmental conditions, etc., the competitive strategy of the university is developed.

Defining a competitive strategy involves selecting one or more of the three alternative strategies (differentiation, cost reduction, focus).

### **Defining strategic long-term goals**

Given the current situation, based on the mission and vision of the University, the Board of Rectors sets strategic long-term goals.

The strategic long-term (7-year) goals have a broad general content, outlining the main directions of the company and the main path. Through activities defined by the mission of strategic long-term goals, determines the stages, the achievement of which will lead to the transformation of the University from the current state to the future, the desired state, which was defined by the vision.

### **Defining goals and sub-goals**

Goals and sub-goals are defined based on long-term strategic goals

The goal is in line with one or more strategic goals, and in time clearly defines the stage at which achievement is one or the only determinant of the achievement of one or more strategic goals.

The goal, in turn, may be broken down into sub-goals

Goal/sub-goal is clear, achievable, measurable, and timed

The goal/sub-goal is accompanied by a strategy for its implementation

Objective/sub-objective is accompanied by criteria for measuring the results of its implementation (KPI)

For each goal/sub-goal, a structural unit responsible for execution is defined

The goals of the university are divided into three categories: Educational goals, scientific goals, institutional goals.

Educational goals are a combination of school/department goals and are developed by schools/departments through close interaction with potential employers, students, alumni, and other stakeholders.

Scientific goals are a combination of the goals of schools/departments, their affiliated or independent research institutes.

### **Developing an action plan**

The action plan of the University of Georgia covers 3 years.

The action plan consists of stages, tasks, and activities based on the goals/sub-goals.

The tasks are defined by the implementation deadlines, performance criteria, resources required for its implementation (capital, technological, human), and the structural unit responsible for implementation.

### **Monitoring the implementation of the strategic and action plan, responding to the results**

The goals and sub-goals, objectives, and other activities defined by the strategic and action plans of the University are monitored and evaluated continuously, following the deadlines set for the goals and objectives, according to the performance criteria.

Goals, sub-goals, objectives, and activities are incorporated into the University Management Electronic System. The structural unit responsible for execution ensures that the execution stage is recorded in a continuous mode. The information is available to the head of the superior structural unit and the members of the rector's board

The implementation is monitored by the rector's board, which regularly (quarterly) receives the reports of the structural units responsible for the implementation of the goals/sub-goals, tasks, and activities defined by the strategic and action plans; identifies the causes of existing deficiencies and responds accordingly.

The reasons for the identified deficiencies may be:

- Goals/sub-goals and tasks could not be achieved due to improper efforts of the responsible service(s).
- Goals/sub-goals and tasks could not be achieved due to the selected ineffective strategy
- Goals/sub-goals and tasks could not be achieved due to insufficient resources
- Goals/sub-goals and tasks could not be achieved due to unexpected obstructive environmental factor

Depending on the causes and scale of the deficiencies identified, the Board may respond by Changing the chosen strategy, changing the goals and objectives, changing the long-term strategic goals, adjusting the mission and vision, etc.

In case the reason for the lack of performance is the improper performance of the work by the responsible structural unit/person, the Board appeals to the Rector for an appropriate response.