



MC 2025 Strategic Plan Project Charter

Prepared by:

Office of Planning and Policy

8/16/2018

Table of Contents

Project Purpose and Justification	3
Guiding Principles	3
Project Assumptions	4
In Scope	4
Out of Scope	5
Project Resources	5
Executive Sponsors	5
Project Team Members	5
Project Acceptance Criteria	6
Stakeholder Inventory	7
Key Project Milestones	8
Project Communication	9
Meetings	9
Documentation	10
Reporting	10
Charter Approval	10

Project Purpose and Justification

The purpose of the strategic planning process is to create a five-year strategic plan that defines and shapes the future course of the College, and provides a framework for allocating annual budget and other resources. The strategic plan serves as an overarching plan that guides and supports other institutional plans and identifies strategic priorities, based upon relevant data and information upon which current and new College initiatives can be justified. As such, the major tasks of the strategic planning process are to:

1. Anticipate, identify, and articulate future trends, challenges, and opportunities
2. Ensure that the plan responds to the current and future educational needs of the community and advances College goals as a comprehensive community college
3. Develop a plan that is responsive, realistic, forward-looking, and provides clear benefits to the College, county, and community
4. Ensure that College operations, priorities, and budgets are aligned with the plan
5. Lead an inclusive strategic planning process that brings together creative thinking, community connections, and resource planning grounded in the College's mission and values
6. Keep the College informed, through discussions at critical junctures, about institutional progress toward accomplishing the goals and objectives of the plan

Guiding Principles

The strategic planning process will be guided by the following principles:

1. Clarity – the process will be transparent and clear about the purpose (why we are doing what we are doing, the process (timelines, dates, and activities), and roles (who does what and who is accountable, responsible, consulted, and informed).
2. Inclusion – all members of the Montgomery College community will have an opportunity to be heard, to be engaged, and to see themselves in the plan.
3. Adaptability – possible hurdles will be anticipated along the way and a process to address issues and assess progress will be in place.
4. Openness – multiple means of communication will be utilized to reach multiple audiences, including visual representations as well as traditional documents.

The strategic plan will be guided by the following principles:

1. High Level Focus – the plan will focus at the collegewide level with an emphasis on institutional strategies and not operational activities.
2. Integration – the plan will provide space for understanding the fit between our multiple master plans and between operational activities.
3. Reasonable Simplicity – the plan will not be unnecessarily complex but will also not be simple for simplicity sake.

4. Implementation – the plan will consider the realistic execution and change management implications of plan implementation.

Project Assumptions

The following expected and assumed conditions will guide the process:

1. The Academic Master Plan, the Student Affairs Master Plan, and other master plans currently in progress will have several initiatives completed under the current *MC 2020* strategic plan. Other Master Plan initiatives that are not in progress or scheduled to start prior to July 2020 will be a primary focus for alignment and integration into the new strategic plan.
2. Some of the Middle States Self-Study suggestions and recommendations will be completed prior to the start of the new strategic plan, so those that are not in progress or scheduled to start prior to July 2020 will be a primary focus for alignment and integration into the new strategic plan.
3. The Achieving the Dream Year 3 and 4 action plan will end under the current *MC 2020* strategic plan. Year 5 of the Achieving the Dream action plan should inform the strategies and initiatives of the new strategic plan.
4. The Equity and Inclusion Master Plan will be composed by December of 2018. The resulting initiatives and strategies not in progress or scheduled to start prior to July 2020 will be a primary focus for alignment and integration into the new strategic plan.
5. Some continuing initiatives from the plans above will span both strategic plans, for example ACES.
6. Budget development for the first year of the new strategic plan (FY21) will begin in July 2019. New requests will focus on continuing initiatives. Many first-year initiatives in the new plan might require reallocation of funds.
7. New benchmarks will be required for the majority of current assessment data. Data available as of fall 2018 will be the basis of new benchmarks. New assessment data will inform adjustments to benchmarks prior to new plan implementation in July 2020.
8. All existing master plans or unit-specific strategic plans will to be integrated into the new strategic planning framework.

In Scope

The scope of this project includes:

1. Integrate Master plans within conceptual framework
2. Conduct targeted SWOT and assessment
3. Perform gap analysis
4. Conduct implementation impact (People, money, time, space, knowledge)
5. Perform STOP analysis and Impact

6. Write the plan (including all of the above)
7. Develop communication plan
8. Confirm benchmarks
9. Assess the planning process

Out of Scope

The following components are out of scope for this effort:

1. Determine budget allocation
2. Assess academic programs
3. Monitor plan implementation
4. Conduct unit/department tactical planning
5. Re-align master plan

Project Resources

Executive Sponsors

The executive sponsors will make final decisions on project activities based on recommendations from the project team.

Name	Title, Role
Dr. DeRionne Pollard	President
Dr. Stephen Cain	Acting President; Chief of Staff and Chief Strategy Officer
Ms. Susan Madden	Acting Chief of Staff and Chief Strategy Officer
Dr. Michelle Scott	Deputy Chief of Staff and Strategy Officer

Executive Sponsors may be modified as the project advances in January 2019.

Project Team Members

Project team members will carry out project activities as directed by the executive sponsors.

Name	Title, Role
Ms. Rose Garvin Aquilino	Acting Associate Senior Vice President for Advancement and Community Engagement and Director of Grants and Sponsored Programs
Ms. Sharon Bland	Chief Equity and Inclusion Officer

Ms. Bo Chan	Senior Planning and Policy Analyst, Office of Institutional Research and Effectiveness
Ms. Sandra Filippi	Interim Director of Planning/Senior Planning, Office of Facilities
Ms. Catherine Giovannetti	Finance Director, Workforce Development and Continuing Education; College Council Chair
Dr. Melissa Gregory	Associate Senior Vice President for Student Affairs
Ms. Linda Hickey	Budget Coordinator
Dr. Cassandra Jones	Director of Outcomes Assessment, Academic Affairs
Dr. Kimberly Kelley	Vice President and Provost
Dr. Kevin Long	Director of Planning and Policy
Dr. Robert Lynch	Director of Institutional Research and Effectiveness
Dr. Tonya Mason	Collegewide Dean of Student Success and Rockville Student Affairs
Mr. Marvin Mills	Vice President of Facilities and Public Safety
Dr. Michael Mills	Vice President of E-Learning, Innovation and Teaching Excellence
Ms. Nancy Nuell	Associate Senior Vice President for Advancement and Community Engagement
Mr. George Payne	Vice President and Provost
Ms. Nadine Porter	Associate Senior Vice President for Administrative and Fiscal Services
Ms. Carmen Poston Travis	Student Affairs Operations Director
Dr. Clevette Ridguard	College Area Review Coordinator and Administrative Associate in the Office of the President
Dr. Mary Robinson	Chair of English and Reading
Mr. Robert Roop	Chief Human Resources Officer
Mr. Lori Rounds	Deputy Chief Information Officer
Dr. Elena Saenz	Associate Senior Vice President for Academic Affairs
Ms. Carolyn Terry	Associate Senior Vice President for Academic Affairs
Ms. Krista Leitch Walker	Interim Director, Human Resources Operations

Project Team Members may be added or modified as the project advances.

Project Acceptance Criteria

This project will be accepted when the following criteria are met:

1. A five-year strategic plan is developed that identifies a set of five to six focused strategic goals that define the ways in which the College envisions itself evolving with specific emphasis on educational excellence, financial sustainability, and community engagement.

2. The strategic plan addresses, in particular, what the College will do to incorporate social justice and innovation into College operations and planning activities.
3. The strategic plan identifies specific strategies to reach those goals.
4. The process utilized to develop the plan is inclusive with input from a broad array of internal and external stakeholders.
5. The plan is data informed.
6. The Board of Trustees approves the plan.

Stakeholder Inventory

The following stakeholders are critical to the success of this project:

Group	Type	Role	Level of Involvement
Board of Trustees	Internal	Direct	High
College Administrators	Internal	Direct	High
Collegewide Governance	Internal	Direct	High
Faculty (full-time and part-time)	Internal	Direct	High
Senior Administrative Leadership Team (SALT)	Internal	Direct	High
Staff	Internal	Direct	High
Students	Internal	Direct	High
Collegewide Programs and Initiatives (e.g., ATD, ATP, ACES, etc.)	Internal	Responsive	Medium
Collegewide Units (e.g., Facilities, IT, Human Resources, etc.)	Internal	Responsive	Medium
MC Foundation Board	Internal	Responsive	Medium
PIC MC Foundation Board	Internal	Responsive	Medium
Alumni	External	Responsive	Medium
Business Roundtable	External	Responsive	Medium
Community Engagement Round Table	External	Responsive	Medium
County and City Governments	External	Responsive/Informational	Medium

Group	Type	Role	Level of Involvement
County community	External	Responsive/Informational	Medium
County Employers	External	Responsive	Medium
Montgomery County Public Schools	External	Responsive/Informational	Medium
Program Advisory Boards	External	Informational/Responsive	Medium
Specific Non-Profit Entities/Partners	External	Responsive/Informational	Medium
Universities of Maryland Shady Grove	External	Direct/Responsive	Medium
Associations (e.g., AACC, ACCT)	External	Informational	Low
County Economic Development Corporation	External	Informational	Low
External consultants working on College projects	External	Responsive	Low
MACC Sister Institutions	External	Informational	Low
MHEC	External	Informational	Low
MSCHE	External	Informational	Low
Other 4 year schools	External	Informational	Low

Key Project Milestones

Milestone	Date
Project charter submitted to president	7/16/2018
Finalize Steering Committee Appointees	7/24/2018
Invitation to College community to join the planning group	8/20/2018
Hold planning kick-off meeting	8/22/2018
Convene Large Planning Group	9/20/2018
Campus and Community Forums	10/1/2018
Strategic planning framework presented to Board of Trustees for its approval	10/15/2017
Campus and Community Forums	12/3/2018
Spring Professional Week planning event	1/16/2019
Present first draft to BOT for review	1/23/2019

Milestone	Date
Second Draft submitted to BOT for review	4/15/2019
Final Plan presented to Board of Trustees for approval	5/13/2019

Milestones may be added or modified after analysis and planning tasks are complete.

Project Communication

Meetings

Who	Date, Time, Location	Purpose
Project Team	7/24/2018 8/24/2018 9/11/2018 9/25/2018 10/9/2018 10/23/2018 11/6/2018 11/27/2018 12/11/2018 1/8/2019 1/29/2019 2/12/2019 2/26/2019 3/12/2019 3/26/2019 4/9/2019 4/23/2019 5/7/2019 5/21/2019 6/11/2019 6/25/2019 (all meetings currently scheduled from 9:30-11:00 a.m. in CT 108)	The purpose of these meetings will be to review progress on plan development, ensure milestones are being met and assessed, provide guidance and feedback to the larger planning group, and refine and edit all project deliverables prior to submission to the President, SALT, and BOT
Executive Sponsors	Weekly with Dr. Scott Monthly with Dr. Cain and Dr. Pollard	The purpose of these meetings will be to ensure that project deliverables are aligned and on schedule with Board expectations and Board charge.

Meeting frequency will likely increase as the project progresses.

Documentation

What	Delivery Method	Purpose
Agendas and Minutes for all Group Meetings	Email and dedicated website postings	Ensure clarity and transparency of meeting purpose and facilitate project momentum
Project Management Documentation	Email and dedicated website postings	Ensure that deliverables are on schedule and that issues and risks are appropriately addressed

Reporting

What	Audience	Frequency	Delivery Method	Purpose
Status Report to Executive Sponsor	President and Chief of Staff	Monthly for the President and weekly for Chief of Staff	In-person and updated and expanded milestone documentation	Ensure project timelines and deliverables are being met and to obtain key decisions to drive the project forward
Updates to Key Stakeholders	Board SALT College Council	Monthly	In-person and written documentation	Ensure project timelines and deliverables are being met and to obtain key decisions to drive the project forward
Updates to Other Groups	Campus faculty, staff, administrators, and community members	October and December scheduled now with two additional dates possible in the spring	In-person	Obtain feedback on planning framework and draft strategic plan language

Charter Approval

Date