



Policy: Institutional Planning

Policy Title	Institutional Planning Policy
Policy ID	2024_Inst_Pl_V2_Po
Effective Date	June 2024
Responsible Office	President’s Office
Approval Authority	University Council

Rational:

The Institutional Planning Policy establishes the standards for the development of a 5 yearly strategic plan and development program of the University.

Scope:

This policy covers all reporting units, programs and services. Administrators, faculty and staff are responsible for completing the assessment of their respective units, educational programs, and/or services.

Institutional Planning Policy

Planning at AUM is coordinated through University Council chaired by AUM President and representatives from academic and administrative units. This committee meets regularly to carry out the following responsibilities:

- Conduct an annual review of AUM vision, mission, and goals.
- Develop an annual assessment of strategic plan and development program by:
 - a) Reviewing significant changes in external and internal environments, identifying new strengths, weaknesses, opportunities and threats.
 - b) Communicating with internal and external stakeholders.
 - c) Monitoring and evaluating progress in fulfilling strategic goals.
 - d) Evaluating the suitability and relevance of the current strategic plan.
 - e) Recommending any necessary changes to the strategic plan.
 - f) Provide the Board of Trustees with an annual report assessing the progress of the university, including the results of its strategic assessment.

The Planning Policy requires an Institutional Strategic Plan that normally covers a five-year period and is updated frequently, and annual action plans for each unit that are allied with the budget and project short-term goals and objectives. Within the institutional mission and vision, the strategic plan develops broad, longer-range institutional goals and the actions necessary to achieve them based on both internal and external sources of evidence from data, advisory groups, student and faculty experience, studies, the external community, and other avenues. In developing the plan, all internal and external factors that generate opportunities or

constraints for AUM are considered, as are the data to assess AUM's current strengths and weaknesses. The strategic planning process is inclusive, with a draft plan generated by the University Council based on campus-wide discussion, review and approval by the staff, and presentation to the Board of Trustees.

Within the framework provided by the strategic plan and in line with AUM's mission and vision, a planning group within each unit, led by the supervisor of that unit, develops an action plan and budget on an annual basis, incorporating the results of various assessments and evaluations communicated and documented by the QAO in planning changes and improvements for the coming year. The calendar for planning and budgeting is linked with the calendar for evaluation for institutional effectiveness to form a continuous cycle of planning for improvement. From the action plans and budget requests of individual units, the university's budget is built, and goals are established against which to measure unit and institutional effectiveness on an annual basis.

At the end of each academic year, an AUM Annual Report is prepared by university leadership in coordination with relative offices. The annual reports of all programs and units feed into this report, which is presented to the Board of Trustees. Comments/recommendations made by the Board of Trustees should be communicated to all concerned parties. In the same time frame, the budget is finalized by the University administration and is presented to the Board for approval.

Progress reports on the implementation of recommended actions and plans are presented to the Academic and University Councils and are documented by minutes. Progress reports are considered one of the important inputs for the process of review/ development of the Strategic Plan document. Therefore, all recommendations or suggestions should be reasonable in nature and achievable within the context of the institution.