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# How Strategic Planning Keeps You Sane When Delivering Distance Programs

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## **Abstract**

This paper details the advantages of creating a strategic plan in the development and delivery of distance programs at the authors' own institution. The steps involved in the planning process and the three key elements of a successful strategic plan are addressed. The key elements include a program plan explaining the roles/responsibilities of both the academic unit and the administrators of the distance programs, a marketing plan which provides a marketing overview as well as specific marketing goals, strategies and tactics, and a revenue/expense report outlining funding for all aspects of program delivery. A framework for the program and marketing plans with complete details is provided as a guide for other distance delivery units interested in incorporating this process.

## **Three-Point Strategic Plan**

Through the development of a three-point strategic plan, the College of Continuing Studies at The University of Alabama has experienced tremendous success in the development and delivery of distance education programs. The planning process is truly a collaboration between distance education program administrators in the College of Continuing Studies and key personnel from the academic unit. The two groups work together to define roles and responsibilities and establish a process for program support. Program administrators constantly evaluate and analyze areas for improvement as well as report on and update strategic plans annually.

Key players in the planning process include academic department heads, program chairs and College of Continuing Studies (CCS) Program Managers (PM) and Marketing Managers (MM). Academic Colleges are assigned to each Program Manager and Marketing Manager from CCS. Program Managers assume responsibility for the administration of all distance degree programs within each assigned college, as well as the development and implementation of the approved strategic plan for each program.

How does this all contribute to staying sane? Everyone not only knows about the plan, but they also participated in the creation of the plan. A roadmap exists to guide the implementation of the various strategic areas and even if bumps in the road occur, focus shifts back on the plan to continue down a successful path. Although a plan exists, we all recognize the need for flexibility curriculum rotation may

change causing a change in course development; marketing avenues may prove to be fruitless – so instead of forging ahead, we evaluate and move financial resources to other flourishing areas. And above all, data we collect helps track areas of strength and areas in need of improvement.

What are the key elements of a successful strategic plan? The Program Manager oversees an extensive process between the College of Continuing Studies and the Academic Unit before the program plan is even written. This process feeds the final plan. Typically, the academic unit approaches the program manager with an idea about a program they would like to offer by distance. In some cases they have already assessed and proven the demand for the program, however sometimes that is not the case and research is required before proceeding. The College of Continuing Studies often relies on assistance from Eduventures to conduct research on program feasibility. Eduventures, a research and consulting firm for Higher Education, partners with more than 300 colleges and universities across the United States. Eduventures helps member institutions achieve organizational goals and solve pressing challenges by providing evidence-based research. As a member institution we can commission customized research projects, such as determining demand for a particular program. The analysts work directly with CCS to design the investigation, deliver the analysis and guide decision-making based on results. From a programming perspective the research focuses on program viability, positioning and differentiation, and operational best practices. If the research received validates a need for the program, the real planning process begins.

Ideally, planning begins well in advance of the program start date giving ample preparation time for a successful program launch. Program Managers work directly with a main contact from the academic unit and begin by meeting with academic unit representatives to address the many issues involved in creating a new program. These issues include SACS approval, program benefits, target audience, curriculum, program format, faculty workload, faculty professional development, student services and resources, enrollment services, course delivery schedule, online course development, recruitment, and marketing tactics. The Program Manager meets with the academic unit representative as often as necessary to address and finalize these issues which are included in the written program, marketing, and revenue plans, which together make up the three-point strategic plan.

At the start of the process, the program manager stresses to the academic unit the importance of obtaining SACS approval to run the program as a distance program prior to the first course offering. This process takes at least 6 months, and therefore must be addressed at the start of the process.

The College of Continuing Studies offers professional development opportunities for faculty members engaged in online and distance instruction. The Program Manager for Online Faculty Development and Assessment is responsible for organizing online instructional development services for instructors teaching distance learners. Development opportunities include an online development course consisting of asynchronous self-paced modules, faculty/instructor-requested opportunities for one-on-one consultations, group sessions, web conferencing sessions, and online instructor community participation. Individual consultations and group sessions, if requested, are tailored to the individual needs of the instructor or academic department. These services are discussed with the academic unit during the planning process and a section titled Faculty Development detailing this information is standard in each initial program plan.

The College of Continuing Studies provides assistance to distance learners in the areas of admission, enrollment and testing. However, not all academic units choose to use CCS resources. Due to strict admissions policies or unique program offerings, some academic units prefer their own staff to work directly with prospective and current distance learners. The use of these services by the academic unit must be identified at the start of the process and included in the written plan.

A staff of CCS instructional developers works with faculty/instructors to develop online and hybrid courses. Because of the large number of courses slated for online and hybrid development, it is necessary to determine well in advance a program's course delivery schedule. Online development must occur at least one semester prior to delivery. Courses delivered during the fall semester require two development semesters to account for faculty working a nine-month contract. Development of online courses is a collaborative effort between the content expert (instructor/faculty member) and the instructional

developer. Based on course objectives, the instructional developer will offer recommendations for instructional activities that incorporate active learning techniques and opportunities for student interaction using appropriate technologies to meet instructional goals. Instructional developers also assist with any future course revisions. The program plan includes a list of courses to be developed and/or revised during the academic year as well as the development/revision term, the delivery term, and the content expert assigned to the course.

A full-time CCS recruiter promotes all distance learning programs offered at The University of Alabama. The recruiter is responsible for providing program information at locations such as career fairs, education fairs, community colleges, conferences, and businesses across the state of Alabama, southeast region, and beyond. In addition, tailored recruitment visits can be designed for specific programs as requested by the academic unit. These services are discussed with the academic unit during the planning process and a section titled Program Recruitment detailing this information is standard in each initial program plan.

With input from the academic unit and the program manager, the marketing manager writes an extensive marketing plan, the second point in our three-point strategic plan. Marketing managers spend a great deal of time preparing a SWOT analysis (strengths, weaknesses, opportunities, and threats), researching competition, and researching specific marketing tactics. Again, advanced preparation is vital to program success. Marketing efforts must be well underway before the program start date in order to produce a significant pool of program applicants.

The revenue allocation report serves as the final point in our three-point strategic plan. Program funding generated from student tuition funnels through the College of Continuing Studies. According to the revenue sharing agreement, the academic unit receives funding based on various criteria. Criteria include full program facilitation via distance learning format, a demonstrated demand by new audiences, and insufficient faculty and/or institutional resources for delivery. If any one of these criteria is not met, the academic department may only receive partial allocation. The funding is split between the academic unit, the institution, and the College of Continuing Studies. The share of funds allocated to the academic unit is used to support costs associated with instruction, graduate assistants, program coordinators, and other program expenses. The College of Continuing Studies uses its share of funds to support the program administration infrastructure which includes marketing, recruitment, online course development, faculty training and workshops, student support services, and technical support services.

The three-point strategic plan outlined in this paper serves as a guide and offers some stability in the insane world of program development. The collaborative relationship between distance learning program administrators from the College of Continuing Studies and representatives from the academic unit fosters a team approach to program development which strengthens the overall program. That collaborative spirit remains constant as the teams continue to meet and discuss program updates. The strategic plan receives an annual update which addresses program success, potential areas of improvement, enrollment and admission goals, curriculum changes, demographic data, new marketing tactics, and the introduction of new services offered by the College of Continuing Studies to the academic unit. When working in the rapidly changing world of technology and distance course delivery, a guide that all parties follow as they work together provides some stability in the insane world of program development and management. Your college can take all or part of the framework we provide and make it work as you try to stay sane when delivering your distance learning programs.

## **Addendum A**

**Program Plan – all details of the program and marketing plan are outlined below.**

### **Executive Summary**

The first part of the program plan includes an executive summary that provides a synopsis of the rationale for the partnership between the academic unit and the College of Continuing Studies. We use hard data when applicable to explain program demand and sustainability.

We include a paragraph which addresses the following issues:

- Program instructors (e.g., full-time faculty from the College of Education)
- Regular teaching load
- Summer overload
- Funding of adjunct instructors

In addition we list the type of funding allocation the academic unit will receive based on established criteria.

### **Background**

The background offers a brief description of the program which may include the following information: number of credit hours, types of required courses, and reasons to pursue the program. This may also include any program accomplishments as well as foreseen obstacles. Any additional research that has been done on the program is also included.

### **Objectives**

This section focuses on programmatic and curriculum goals that the overall program plans to address. For example, the program may be designed to fill a need in a particular career field experiencing growth or a change due to new technology developments.

### **Benefits**

Program benefits, followed by an explanation of those benefits, are outlined in this section. Benefits may include the convenience of the format, career opportunities, value of knowledge gained, and an advanced education.

### **Audience**

In this section we list the primary, and if applicable, secondary groups of people expected to take advantage of the program.

### **Curriculum**

The curriculum section details the number of credits required in the program and is followed by a list of required courses.

### **Required Courses**

This section includes the list of required courses and credit hours. Electives and any other course options are also included here.

### **SACS Approval**

We include this section when 50% or more of the program is delivered via distance. The date in which the program received approval is listed.

### **Program Format**

Program format information lists the way in which the courses will be offered, length of time to completion, application deadlines, and cohort information if applicable.

### **Faculty Workload**

This section names the unit responsible for determining who will deliver the courses. In addition, we address teaching load and define teaching overload for compensation purposes.

### **Faculty Development**

This section remains constant in all program plans and provides an opportunity to explain our commitment to faculty professional development.

### **Student Services Resources**

This section remains constant in all program plans and lists the services and resources available to distance learners. It also outlines any additional student services that CCS provides to the academic units.

### **Enrollment Services**

This section remains constant in all program plans and simply states our commitment to providing assistance to students registering for courses once the admission process is complete.

### **Program Recruitment**

We provide standard information about recruitment efforts in this section. When applicable, we also include program specific recruitment efforts.

### **Course Schedule**

A brief description of the way in which courses roll out is provided in this section followed by a course schedule. If possible, we include a two or three year projected course schedule.

### **Course Development/Revision**

This section details our commitment to establishing a plan and collaborating with faculty/instructors during the online development and revision process. It is followed by a course development/revision and delivery schedule.

### **College Responsibilities**

This section lists each colleges responsibilities as they pertain to faculty training, marketing, assessment, online course development, funding, teaching assignments, course sequencing, and course management system support.

### **Evaluation/Assessment**

We include a standard statement in all initial program plans indicating the need to collaborate yearly with the academic unit and evaluate all program areas.

### **Online Information Sessions**

The College of Continuing Studies recently launched a new marketing initiative. Online information sessions provide potential students with the opportunity to learn more about distance learning programs by interacting live with faculty and staff through a virtual classroom. We include this section in the program plan when academic units choose to take advantage of this opportunity.

### **Marketing Plan**

This section simply states that the marketing plan is attached and lists its contents.

### **Financial Plan**

This section simply states that the projected financial plan is attached. If any of the criteria for funding allocation changes from year to year, we note this change and the percentage change in this section as well.

### **Program Degree Team**

We list all parties involved in the planning process from both the academic unit and the College of Continuing studies. We include name, title, phone number, and email address.

### **Program Plan Updates**

An evaluation of the program is completed each year with the academic unit. Some aspects of the program that may be included in the update each year include program changes and program accomplishments. In addition, the program goals are evaluated and discussed. If any additional support, such as faculty development, recruitment, etc., is going to be provided by CCS, those support elements are included in the updated plan.

### **Marketing Plan Section of the Program Plan**

#### **Marketing Overview**

This section includes an overview of the degree program from a marketing perspective and a synopsis of

the marketing plan, including any research on current demand for the program. An environmental analysis should provide information on the potential candidate for the program and explains specifics such as prior degree requirements, work experience requirements, average age, geographic location (if any), gender, and ethnicity.

A Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis is also part of this section. Based on the SWOT analysis, the marketing manager will highlight any areas that need to be addressed as well as the focus of marketing messages. Ideally, we should be able to analyze these areas and use what we have identified to our advantage.

Also emphasized in this section is direct and indirect program competition. For example, if the program is online, the direct competition would include any similar online program and the indirect competition would include a similar program available in another non-competing format.

And finally this section details the product, in this case the degree itself, and any special features about either the academic college or the university as a whole that make the program unique or more attractive to a potential candidate. Features include college or faculty awards, college rankings, etc.

### **Marketing Objectives**

This section includes all of the marketing objectives for the upcoming year. The objectives should be clear and measurable with a stated time frame for achievement. Typically, admission/enrollment objectives for the approaching academic year are included. In addition, all identified strategies and tactics should adhere to the fulfillment of the marketing objectives.

### **Target Markets**

In this portion of the marketing plan we identify who we are trying to reach with our marketing efforts and include both primary and secondary targets (if any). The target market must be clearly defined and includes anything that is specific to this group, such as demographics, interests, and common themes applicable to the audience.

### **Positioning**

Under this section we identify our unique selling position. A statement is created that pinpoints how this product (degree) is perceived in the minds of our target market. It should focus on how we are different from our competitors and what unique benefits are derived from our product (degree).

### **Strategy Pyramids**

Marketing strategies and tactics are listed in this section. They are used to translate the identified goals into action. Strategies outline what we are going to do meet the goal, and tactics specify action steps required to accomplish the strategy. Obviously, only those strategies/tactics most likely to meet the goals are included, especially when taking into account limited budgets.

### **Marketing Budget**

This section lists the all of the tactics identified and associated costs of each. Ideally, there should be sufficient funds to meet the marketing objectives.

### **Marketing Plan Updates**

As with the program plan, a yearly evaluation of the marketing plan is done and updates are noted in the plan for the following year. Updates to the plan may be based on changes in program strategy that, by extension, change the marketing strategy. However, even if the strategies remain the same, changes in the marketing landscape might require updates to tactics. For example, new competition might be identified, there might be a change in consumer demand, or even a change in the tactics to best meet the strategies. A detailed analysis of the previous year's activities also leads to changes in how we approach continued marketing of the program.

### **Revenue/Expense Allocation**

This section of the program plan includes revenue obtained in the program as well as all expenses

incurred by both colleges. Typical expenses cover instruction, course development, faculty development, marketing, and recruitment.

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