



STRATEGIC PLANNING – QUICK TIPS

Your academic institution will continuously face a changing environment and demands from competing stakeholders. As a higher education leader you are likely to find yourself leading (or being a member of) a committee charged with developing a strategic plan. Since strategic planning consumes significant time and effort and can provoke disagreements over goals and methods, careful preparation and buy-in from stakeholders is necessary. Here are some tips to guide you in the planning process.

Know What a Strategic Plan Is

It is important at the outset for all those involved to understand what a strategic plan is and is not.

The strategic plan:

- is future looking and focused on meaningful long-term and short-term goals that guide decision making and allocation of funds at all levels of your organization;
- aligns your organization's actions with its mission, vision, and environment; and
- is just one aspect of strategic leadership.

The strategic plan is not:

- an organizational, business, financial, or marketing plan; or
- a wish list or collection of vague platitudes, clichés, and generalities.

Lay the Foundations for the Plan

Before beginning the planning process, considerable work goes into laying the foundations for the plan. Most leaders initiate the process with such steps as these:

- forming a committee;
- identifying the reasons for planning;
- determining the roles of those on the committee;
- setting a timeline;
- deciding whether to bring in a consultant; and
- developing a structure for engaging stakeholders.

Conduct a Situational Analysis

As part of preparing for the strategic plan, your committee should conduct a data-based situational analysis of your organization's environments.

For external analysis: identify your stakeholders and who they are. What services do you provide? What alternatives, competitors, and new potentially disruptive innovations (technologies) are emerging?

For internal analysis: identify core competencies. What things do you do that are difficult for others to duplicate? What do you do that is of greatest value to those you serve?

There are two common approaches to conducting a situational analysis. For *internal* analysis, there is SWOT. Here your organization will look at itself and organize its features into four categories: strengths, weaknesses, opportunities, threats. For *external* analysis, there is PESTLE. Here your organization will look at political, economic, social, technological, legal and environmental factors that will affect your organization.





Who Are You?

Discussions among your committee members and stakeholders should produce statements that will be the basis for the actual strategic plan. These statements commonly go together and consist of:

A mission statement: states your organization's purpose, reason for being, and those you serve.

A vision statement: focus on the future. States what your organization will look like, what it wants to be, and what it hopes to achieve in the long term.

A statement of core values: states the standards and guiding principles of your organization, and what you consider is right or wrong for your organization's activities.

Writing the Strategic Plan

Structure

At the heart of the planning process is identifying and evaluating possible strategies. Strategies comprise the tactics, goals, objectives, and actions that enable your organization to succeed in its mission and achieve its vision.

Tactics enable you to enact your strategies; they are plans that are aligned with the organization's vision, mission, and values.

Goals are general statements that describe what your organization wants to achieve over the longer term. They are aligned closely to the mission and vision statements. They are broad, general, abstract, and cannot be precisely measured.

Objectives are short term, narrow, and specific; they are the result of concrete actions undertaken to achieve a goal. They are SMART (specific, measurable, attainable, relevant, and time-bound). (See also "Setting Goals - Quick Tips" for further on setting SMART goals. Online: <https://ethicscenter.csl.illinois.edu/files/2018/02/Setting-Goals-Quick-Tips-SL-87.pdf>)

Actions are the what will be done (by whom, when, where, how) to realize your organization's mission, vision, goals, and objectives. Actions should be capable of being measured so you can know when an action has succeeded.

Priorities

You will not be able to undertake all your actions at once; you will need to prioritize them on the basis of availability of resources, potential risk if they not undertaken, support by stakeholders, and degree of impact.

Actions come in various forms:

- some must be completed before others can be undertaken;
- some require immediate action, others distant action;
- some are quick and easy to achieve while other require long-term time and resources; and
- some have a low chance of success, and some a high chance.

The Final Document

The written plan your committee produces can be organized in many ways and contain various elements. Most plans will include:

- an introduction;
- an overview, including background and establishing the need for the plan;
- mission, vision, and values statements; and
- multiple sections that set out strategies and (in descending order) the tactics, goals, objectives, and actions to achieve them.

Your strategic plan should also include:





- a **mandate** to develop an implementation plan that includes a system of accountability and for continuous monitoring of the environment; and
- how to **communicate** the plan to your stakeholders and to gain their commitment.

What Happens Next

Your strategic plan is useful only if it is used as a guiding document for your organization until circumstances or opportunities change. There should be a plan for following-up on the objectives and actions and reporting back on progress at certain points.

References and Resources

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