

# STRATEGIC PLANNING

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## Dwight D. Eisenhower on planning -

“In preparing for battle I have always found that plans are useless, but planning is indispensable.”

“Plans are nothing; planning is everything.”

## On direction -

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Alice: I was just wondering if you could help me find my way?

Cheshire Cat: Well that depends on where you want to get to.

Alice: Oh, it really doesn't matter ...

Cheshire Cat: Then it really doesn't matter which way you go.

## John Naisbitt on Vision -

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“Strategic plans are worthless unless there is first strategic vision.”

## Basic principle underlying participative management:

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*What* comes down,  
and *How* comes up.

# Benefits of Strategic Planning

- Clearly define the purpose of the organization and to establish realistic goals and objectives consistent with that mission in a defined time frame within the organization's capacity for implementation.
- Communicate those goals and objectives to the organization's constituents.
- Develop a sense of ownership of the plan.
- Ensure the most effective use is made of the organization's resources by focusing the resources on the key priorities.
- Provide a base from which progress can be measured and establish a mechanism for informed change when needed.
- Bring together of everyone's best and most reasoned efforts have important value in building a consensus about where an organization is going.

# When Should Strategic Planning Be Done?

- When an organization is just getting started.
- In preparation for a new major venture, for example, leadership of a new President.
- At least once a year in order to be ready for the coming fiscal year (However, not all phases of strategic planning need be fully completed each year).
- Each year, action plans should be updated. The frequency of review depends on the extent of the rate of change in and around the organization.

# Strategic Planning Models

- “Basic” strategic planning
- “Issue-Based” or “Goal-Based” Planning
- Alignment Model
- Scenario Planning
- Organic (or Self-Organizing) Planning

# Strategic Planning Process (at a College level):

- Understanding the University's Strategic Plan. Thorough understanding of the institution's priorities.
- Development (or reaffirmation) of the purpose, mission, vision, and values statements of the college. This includes applying tests to the statements.
- Communication of these statements to all faculty and staff, soliciting questions of clarification and suggestions for improvement. This communication is face-to-face, with leadership presenting and listening.
- Development of a document that spells out the purpose, mission, vision, and values of the college.

# Strategic Planning Process (continued):

Development of a communications plan that saturates the consciousness of everyone with the following:

- What business are we in and why?
- Where we are going?
- What we stand for as an organization?
- Environmental Scan (taking a wide look around)
- Strengths, Weaknesses, Opportunities and Threats (SWOT Analysis)

# Strategic Planning Process (continued):

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Culture survey to establish a baseline against which change can be compared (Change management).

# Strategic Planning Process (continued):

Develop priorities and goals for the college in light of the university strategic plan.

- Set Goals that are aligned with university goals.
- Develop strategic plans that are aligned with the university plans.

## Methods:

- Educate staff about university's goals and strategic plan.
- Examine college's vision, mission, and values in light of university's strategic plan.
- Goal-setting sessions held in all departments. Criteria for these goals include the following:
  - What we hope to accomplish
  - How this relates to the vision of the organization
  - How we will track progress  
(Note that these statements do not specify how they will attain their goals.)

# Strategic Planning Process (continued):

Develop plans for achieving the college goals – “Work Plans” or “Action Plans”

## Methods:

- Strategy sessions within each organizational unit to create action plans to accomplish the agreed-upon goals that are aligned with the university’s vision and plan:
- Who will do what, when, where, how, with what intent, and how results will be tracked.
- How the plan supports the realization of the organization's vision.
- Communication of plans to the leadership as commitment statements.

# Strategic Planning Process (continued):

- Unit heads and staffs create unit-level strategic plans. (Most common)
- Cross-unit committees or work groups to create work plans focused on one or more strategic goals.
- Assess current programs and services to determine how they align with new goals and to help identify what needs to be put in place to accomplish the new goals.

# Strategic Planning Process (continued):

## Implement the Plans and Monitor Progress

- Objectives
- Responsibilities
- Timelines

# Strategic Planning Process (continued):

Monitoring and evaluation is as important as identifying strategic issues and goals.

- Monitoring and evaluation is to ensure that the organization is following the direction established during strategic planning.
- Leadership can learn a great deal about the organization and how to manage it by continuing to monitor and evaluate the planning activities and the status of the implementation of the plan.
- Note that plans are guidelines. They aren't rules. It's OK to deviate from a plan. But planners should understand the reason for the deviations and update the plan to reflect the new direction

# Strategic Planning Process (continued):

Key sources of information used to make decisions about discontinuing, modifying, and implementing programs and services in support of new goals:

- Data on utilization
- Surveys
- Evaluations
- Feedback from staff
- Cost-benefit analysis
- Budgets
- University goals and priorities
- College mission, goals, and strategic plans.

# Strategic Planning Process (continued):

Barriers to discontinuing, modifying, and implementing programs and services in support of new goals:

- Lack of financial resources.
- Difficulty allocating financial and human resources.
- Limited staff time.
- Lack of good data on program effectiveness.
- Push-back from those who have been served by a program being discontinued.
- Staff resistance – those who have invested a lot of time in the program or service.

# Strategic Planning Process (continued):

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## Writing and Communicating the Plan

Have a plan for who should receive the document.

# Strategic Planning Process (continued):

Strong college-level leadership is critical to achieving strategic alignment.

- Department heads must understand how their department contributes to the university mission and goals.
- Department heads must see their department as more than simply providing a service but as “central to creating an institutional culture of success.”
- A shift in paradigm may be required in certain departments.

# FUTURE STATE 2015

## Mississippi State University

- Introduction
  - Vision
  - Process Summary
  - Purpose statement
- Executive Summary
- Purpose and process summary
- Assumptions
- Goals
- Strategies for Attaining our Goals
- Initiatives to Implement our Strategy
- Appendices
  - A: Centers of Excellence
  - B: Implementation, Review, and Assessment
  - C: Recommendations for Future Implementation or Consideration

# VISION 2020 – Texas A&M University

- Executive Summary

- Introduction
- The Idea
- The Goal
- The Best
- Our Strength
- The Need
- Our Core Values
- Our Mission
- Our Vision
- Creating the Culture of Excellence

# VISION 2020 – Texas A&M University - continued

- The Imperatives
  - Precepts
  - Goals
- The Next Step – Achieving the Culture of Excellence
- Appendices
  - The Background
  - Participants
  - Resolution to the Regents

# Sample Strategic Planning Manager (College or Unit level)

Purpose: to oversee assessment and strategic planning.

Major areas of responsibility:

- Evaluates the assessment and strategic planning processes in all departments within the college.
- Directs the development and implementation of more effective outcome measures.
- Provides research and information on applicable normed benchmarking and assessment instruments.
- Directs the incorporation of outcomes assessment in the college and all departments' strategic planning.
- Plans, organizes, and develops goals and procedures for assessment and planning for the college.
- Serves as the central clearinghouse for all college assessment documentation and provides relevant strategic planning information to the various departments and partners of the college.

# Strategic Communication

Digital communication (e-mail and website postings) is frequently viewed as one of the most effective ways to communicate with senior university leadership, students, and the university community as a whole.

# Communicating Successes to Senior University Leadership

- Provide information for President's speechwriters.
- Small group meetings or briefings.
- E-mail messages.

# Communicating Successes to Senior University Leadership

## Nontraditional methods

- Bring students who are impacted by a particular program to the meeting/briefing.
- Video tape or transcribe students' testimonials for meetings, web postings, or print.
- Meet with VPs and Deans to discuss your college and seek collaborative opportunities.
- Invite the President and/or Provost to a luncheon with department heads. Discuss your college's role in the university's overall strategic plan.
- Seek other outreach opportunities to "tell your college's story."

# Communicating Successes to Senior University Leadership

## Barriers

- Time, i.e. getting the attention of senior leadership.
- Unclear understanding of your complete mission and goals.

# Communicating Information about Programs and Services to Students

- Web-site postings
  - Create attention getters for targeted audiences on webpage.
- E-mails
- Campus newspaper articles or ads.
- Emerging:
  - Web communities such as Facebook and MySpace.
  - Text messaging.

# Communicating Information about Programs and Services to Students

## Barriers

- Students receive a tremendous amount of information – how to make yours stand out.
- How to effectively target the “right” students to receive your messages.
- How to get the student newspaper to print articles about your programs, services, or events:
  - Send information to the editorial board, including student contact information so the newspaper can interview students.
  - Establish a good relationship with the newspaper staff.
  - If all else fails – buy an ad!

# Communicating Successes to the University Community

- Web-site postings, e-mail messages, and press releases are most frequently cited methods.
- Newsletters.
- Newspaper articles or ads.
- Barriers:
  - A tremendous amount of information goes out to the community – how to make yours stand out.
  - Who is the target audience?

## Sources:

- John E. Jones & William L. Bearley, 1995. Organizational Universe Systems, San Diego, CA.
- Eduventures, Learning Collaborative in High Education, 2007. Achieving Strategic Alignment, Boston, MA.
- Vision 2020 – Texas A&M University Strategic Plan, 2000.
- Future State 2015 – Mississippi State University Strategic Plan, 2007.