



Planning to Plan: Designing a Strategic Planning Process to Maximize Success

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When we think of traditional on-campus partnerships, writing a strategic plan is unquestionably daunting. From ensuring that the mission, vision, and core value continue to reflect the campus to reassuring that all potential campus stakeholders feel their voices are accounted for, it is no easy task to formulate, implement, and assess a plan that will guide activities for a significant period. But strategic planning is also an inspirational process—one that moves the campus toward achieving its mission and progressing in its vision.

Through an intentional, holistic process, strategic planning can successfully serve its intended purpose: providing a roadmap for the campus through agreed-upon priorities to meeting goals and objectives through cross-campus collaboration over a series of years.

But, how can a campus plan for strategic planning? What decisions should be made ahead of starting concentrated planning efforts? And what factors should be weighed when determining a process that maximizes the potential for success?

1. Internal or External Leadership?

One of the first decisions a campus must make related to strategic planning is whether to run the process internally or to engage

with an external consultant. There are obvious advantages to each approach. Internally led efforts come with a wealth of institutional knowledge and memory. They will not need to take stock of the current campus landscape and may be able to move more expediently—especially early in the process. But that same expediency could lead to alternatives being overlooked or never presented. Likewise, internal processes fall victim to internal politics. Outsiders are able to ask tough questions and point out items for consideration that an insider may be unable—or unwilling—to do. Cost also plays a factor here. Utilizing a consultant will carry some budgetary requirements.

If a campus opts to utilize the services of a consultant, they still need to have a campus-based strategic planning steering committee that liaises with the consultant. This committee should not be filled with only senior-level administrators, either. Only by having representation from administrators, faculty, staff, and even students and the Board of Trustees can a truly cross-campus planning process emerge. Some committees have even begun adding community leaders to assure community interests are considered.

It is also important to note that not every consultant is created equal. While an understanding of contemporary strategic planning will likely lead to consultants being able to support comprehensive institutional strategic efforts, the greatest value comes from finding a consultant who has on-campus experience as faculty or staff, comprehends how strategic planning, assessment, and regional accreditation tie together, and has a firm understanding of cross-pressure present on college and university campuses. At the end of the day, fit matters above all else. An external consultant will need to become a de facto member of the campus community to maximize their contribution to the process.

2. Bringing All Voices to the Table

When thinking about planning for a strategic planning process, a key element is determining how to guarantee all possible campus stakeholders have an opportunity to have their voices and ideas

heard. Ideally, each campus stakeholder group will be represented on the steering committee, but individual faculty, staff, students, administrators, board members, and community members will have the opportunity to discuss strengths, weaknesses, opportunities, and threats to the campus over the length of the plan. These efforts of including multiple voices should be genuine in intent and carry through the length of the planning process.

In a typical process, campuses should hold open listening sessions with various stakeholders where three or four big-picture questions are discussed among like-positioned individuals (for example, there should be a listening session for staff and only staff, which does not include supervisors that could sway what staff members say by being present). These listening sessions provide both possible strategic priorities and more operational concerns that are still useful for campus administrators to hear about. Beyond the initial listening sessions, focus groups should be conducted with smaller groups representing campus constituencies as the initial draft plan comes together. These focus groups help achieve buy-in and verify if the planning committee is headed in the right direction.

3. The Length of the Plan

Early in the planning to plan process, campuses should determine the appropriate length for their strategic plan. Most campuses lean toward five-year strategic plans, which provide ample time for building out priorities and strategies and seeing all elements through. Moreover, this timeframe allows for developing new areas of the campus that might emerge from a strategic plan without having to rush. There are times, however, when campuses may opt for shorter (perhaps three years) or longer (sometimes seven years and maybe even ten years) durations.

Shorter durations might arise when attempting to tie-in strategic planning with regional accreditation reports or visits. Likewise, if there is an anticipated retirement of a president or chancellor, a strategic plan may be timed to coincide with the leadership transition. This allows the current president to remain to oversee a strategic plan while not binding a new leader to previous decisions. Longer plans may be instituted for the same reasons. The concerns with plans that are fewer than five years center on what can be expected to be accomplished in a tight timeframe and what do those efforts mean for operational requirements on campus. Are the resources, in terms of money and time, available to push an aggressive timeframe on campus? Longer timeframes bring concerns about momentum being lost or strategic directions changing. And the environment can change rather dramatically over a decade, which could lead to a long-term strategic plan becoming irrelevant or even misguided.

4. Determining Operational vs. Strategic

Whenever a strategic planning process is discussed on campus, it is essential that those overseeing the process work to determine how they will differentiate between strategic and operational items. Both are important to the long-term success of campus and will arise throughout the planning process. But, how will both be handled? If faculty, staff, or students bring forth operational concerns that are not strategic in nature, what will be the response? How will these operational pieces be integrated into the larger strategic planning process and framework?

It is equally important to note that every campus' situation and circumstances are unique. As such, what is operational for one campus could be strategic for another. For example, replacing computer hardware on campus could be an operational item for a campus with well-established information technology policies and procedures while for a campus that is behind on maintaining hardware could find this to be quite strategic. In short, it is important that campuses remember that what is strategic versus operational will depend on their own understanding of their situation and the amount of emphasis that needs to be placed on accomplishing what is desired.

5. Starting With the End in Mind

The last thing campuses need to pay specific attention to while designing a strategic planning process is how they envision the final product. Entering the process with an idea of anticipated terminology and structures can help build momentum and maintain focus throughout the process. Likewise, knowing that the end goal is to create cross-divisional plans that brings the campus together to work on particular tasks will shape how constituencies think about the planning process throughout your efforts. While there's nothing wrong with being flexible and not having a firm vision of what structure the final plan might take, thinking about these pieces earlier rather than later will help bring everyone onto the same page when brainstorming ideas.

By taking time to plan the planning process, campuses can best position themselves to meet their goals. Beyond being a pivotal document in defining the goals of an institution, strategic planning takes time, effort, and significant resources. Ensuring that the process is intentional, inclusive, and integrated within the larger campus planning framework will help secure buy-in from the campus community and put us one step closer to achieving institutional progress and success.

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