

What is a Strategic Plan?

- Serves as a framework for decision making, planning, or for securing support or approval.
- Applies at any level – unit, department or personal.
- Provides a basis for more detailed planning.
- Explains the business focus to others in order to inform, motivate and involve.
- Assists in benchmarking and performance monitoring.
- Stimulates change and becomes a building block for the next plan.

Basic Approach to Strategic Planning

A Strategic Plan must:

- Focus on matters of strategic importance.
- Be separated from day to day work.
- Be realistic, detached and critical.
- Distinguish between cause and effect.
- Be written down.
- Be reviewed periodically.

In developing a strategic plan it is necessary to clearly identify the current status of the department or organization, its objectives, and strategies for desired future results.

Strategic Planning Assess Current Position

The starting point must be to determine the existing vision, mission, objectives and strategies. Judge them against actual performance along the following lines:

- Is the current vision being realized?
- How have the mission and objectives changed? Why have these changes occurred?
- What are the goals? Are they realistic?

Use of a matrix such as the one below might serve to generate awareness in consideration of “Where we are now,” and provide the foundation for a vision and mission statement from which to springboard the strategic planning process.

<i>Check each box which contains a true statement</i>	Our Vision includes:	Aligned with student needs, business needs and best practices	Has top level sponsorship	Is known and supported by the college community
A compelling statement of who we are in the future				
Key concepts and guiding principles				
Future technologies				
Desired work environment				

Connecting the various visions of where we think we are, where we actually are, and where we want to be, provides the basis on which to develop a realistic Strategic Plan which needs to contain the following:

- A Vision
- A Mission Statement
- Values
- Strategies
- Objectives
- Tactics or Programs

The Vision

The vision should be realistic.

The Mission

The nature of the service provided by the college/department should be expressed in the mission. "What do we do." (i.e.: "Provide lifelong educational opportunities to community residents.")

The Values

Need to define the values governing the operation of the department and its conduct or relationship with both internal and external communities. (i.e.: "we are student centered.")

The Objectives

Explicitly defines the department's objectives in terms of results in its needs and wants. (i.e.: "Increase enrollment by 10% by the year 2010.")

The Strategies

Strategies are the directions to be taken in order to achieve the goals of the mission and objectives.

The Tactics

The tactics or programs should cover specific resources, objectives, deadlines, budgets and performance targets.

A review of past achievements, in conjunction with current status provides the basis on which to correctly identify the Vision, Mission and Values. Having established "Where We Want to Be," a critical examination of existing or perceived Strengths, Weakness, Opportunities and Threats (SWOT) provides a means by which to define Objectives, Strategies, and Tactics necessary to achieve the overall Mission.

SWOT - Business Strategies

Strengths and Weaknesses

Strengths and weakness are essentially internal to the college/department and relate to matters concerning resources, programs and organizations in key areas. They include:

- Marketing—distribution—promotion—support;
- Management—systems—expertise—organization—succession;
- Operations—efficiency—capacity—processes—assessment;

- Curriculum—service—quality—pricing—catchment area—competitiveness;
- Finances—resources—performance;
- Costs- productivity—purchasing.

Opportunities and Threats

The external opportunities and threats confronting a college/department can exist or develop in the following areas;

- Climate - where funding and structural changes may be occurring;
- The marketplace which may alter due to economic or social factors;
- Competition which may create new threats or opportunities;
- New technologies which may be causing fundamental changes, costs or savings;

Against an uncertain and shifting background, the objective must be to identify and prioritize the SWOT and use them to identify possible strategies:

- Build on strengths
- Resolve weaknesses
- Exploit opportunities
- Avoid threats

At the departmental or unit level, a town hall meeting to discuss SWOTs provides a means to generate support and identify possible goals and tactics.

Once completed, your campus/departmental plan can be incorporated directly into the Performance Evaluation process by allocating areas of responsibility for specific Directions, Objectives and Tactics.

Strategic Plan Annual Review Process:

- Assessment of existing strengths, weaknesses, threats and opportunities
- Vision of the business in the next 5 years
- Mission (purpose statement for the next 5 years)
- Statement of Values
- Long term objectives
- Key strategies
- Assessment of future strengths, weaknesses, threats and opportunities
- Review of the vision, mission, values and objectives
- Specified major strategic directions achievable over the next 5 years
- Definition of the strategic action plan and on-going planning process

The following link will take you to UNM-Valencia's Strategic Plan:

<http://www.unm.edu/~strgplan/>

Adapted from a report generated for UNM Management Academy "Developing a Strategic Plan", by Ronnie McComb, Shane Urioste and Virginia Williams, 2004.