

Strategic Planning

Notes from Dean Matt O'Donnell, College of Engineering

The strategic planning process answers four essential questions:

- Where are we now?
- Where do we want to be?
- How will we get there?
- How will we know when we arrive?

Strategic planning requires that organizations constantly revisit the plan to make sure it is still viable in the face of changes within the organization.

Elements of the strategic planning process:

Preplanning Stage

Decide on:

- Process
- Participants
- Time Frame
- Planning tools such as Statistical models/ SWOT analysis

Environmental Scan *(answers: Where are we now?)*

- Internal Scan (SWOT) - Define special opportunities in your discipline
- External Scan (SWOT) – Review national competitors, Compare your department with one of the departments you are trying to catch in the short term and one department you aspire to be in the long term.

Formulate Strategy *(answers: Where do we want to be?)*

- Develop vision *(describes what will carry the dept. into the future, where is the department going and how the UW will/can contribute to the discipline)*
- Develop mission *(describes the dept., what it does, where it is going and how it will achieve the vision)*
- Develop values *(organizational beliefs reflected in the culture. Sometimes a strategic plan needs to have goals about how to align the actual values with the desired values)*
- Develop goals *(should be specific, measurable, action-oriented, realistic, and time-based)*
Must include criteria and metrics for assessment of progress toward goals. Needs to include partnerships/collaborative efforts

Implement Strategy *(answers: How do we get there?)*

- Develop tactical goals
- Develop budget - \$, faculty positions, staff positions, space and facilities – overview of resources available to build/enhance programs
- Identify key potential partnerships – they should be cross-referenced between individual unit plans. Partnerships can multiply resources and help units reach long-term goals in much shorter time frames
- Develop action plans – including development plans
- Execute plans

Evaluate Strategies and Make Adjustments

Strategic Plan Template

1. Environmental Scan

Internal: *Strengths, Weaknesses, Opportunities, Threats*

Should be short paragraphs or bullet points on each SWOT point

External: *Strengths, Weaknesses, Opportunities, Threats*

Should be short paragraphs or bullet points on each SWOT point – compared to national and international competitors.

2. Formulate Strategy

Vision: *Short statement on future of department*

Mission: *Short statement about what the dept does and how it will achieve the vision*

Values: *Short statement on values of the department or desired values/culture*

Formulate Broad Goals: *Describe broad goals to address weaknesses, build or enhance program, change culture, accomplish vision and other. Goals should be specific, measurable, action-oriented, realistic and time-based*

3. Implement Strategy

Develop tactical goals related to broader goals: *Specific, measurable, action-oriented, realistic and time-based*

Develop budget: *\$, faculty positions, staff positions, space and facilities – overview of resources available to build/enhance programs – no detailed spreadsheets*

Develop action plans & execute: *Implementation plans for broad goals (e.g., form committees, gather data) – identify partnerships and how these partnerships will be implemented (e.g., identify faculty members from different units who will serve on faculty search committees)*

4. Evaluation

Evaluate strategic plan and make adjustments as necessary: *Build in metrics and checkpoints for review of department milestones, need for adjustments to plan in the future*