

STRATEGIC PLANNING

Strategic Planning in Higher Education
Guiding your institution's future

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Overview

Part One:

- Purpose
- Components
- Identify Pitfalls
- Ensuring Success with Strategic Planning

Part Two:

- Q & A



About The Presenter

- Co-Founder and Managing Partner of the Alhambra-U.S. Chamber of Commerce
- Vice President of House of Tutors Learning Centers
- Co-Founder of the Intensive American English Institute
- Consultant to various social and educational enterprises



Definition of Strategic Planning

Moving an organization forward towards a **shared vision**, through **agreed-upon goals** and objectives.



Without Strategic Planning

Organizations may wander aimlessly, or worse, be blindsided by unforeseen circumstances.



Activity 1: Think and Share

If you have worked on a strategic planning team:

- Tell how long it took to produce.
- Explain what you wish had been done differently.



Why Strategic Planning?



Connections. Expertise. Results



ALHAMBRA U.S.
CHAMBER OF COMMERCE

The Purpose of Strategic Planning

Perceived Advantages:

- Increasing demand by students
- Managing declining funding
- Effective use of resources
- Analysis of competition



Eight Basic Steps of Strategic Planning

1. Identify core values/articulate the mission.
2. Develop a shared vision.
3. Analyze the situation/identify who is served.
4. Create an agenda.



Eight Basic Steps of Strategic Planning

5. Provide measurable goals and establish concrete objectives.
6. Establish an action plan.
7. Assign responsibilities and timeline.
8. Acknowledge completion and celebrate success.



Four Logistical Components

1. Who Participates
2. Time and Effort
3. Cost
4. Length and Complexity



Misconceptions and Pitfalls



Activity 2: Identifying Misconceptions and Pitfalls

1. Share real strategic planning problems.
2. Brainstorm potential problems.



Misconceptions and Pitfalls

1. Disconnect between formulators and implementers
2. Unrealistic goals and lack of purpose
3. Complexity
4. Lack of accountability
5. Inflexibility



Misconceptions and Pitfalls

6. Undervaluing a strategic plan and undervaluing evaluation
7. Lack of leadership buy-in
8. Accepting lack of consensus
9. Lack of commitment at every level



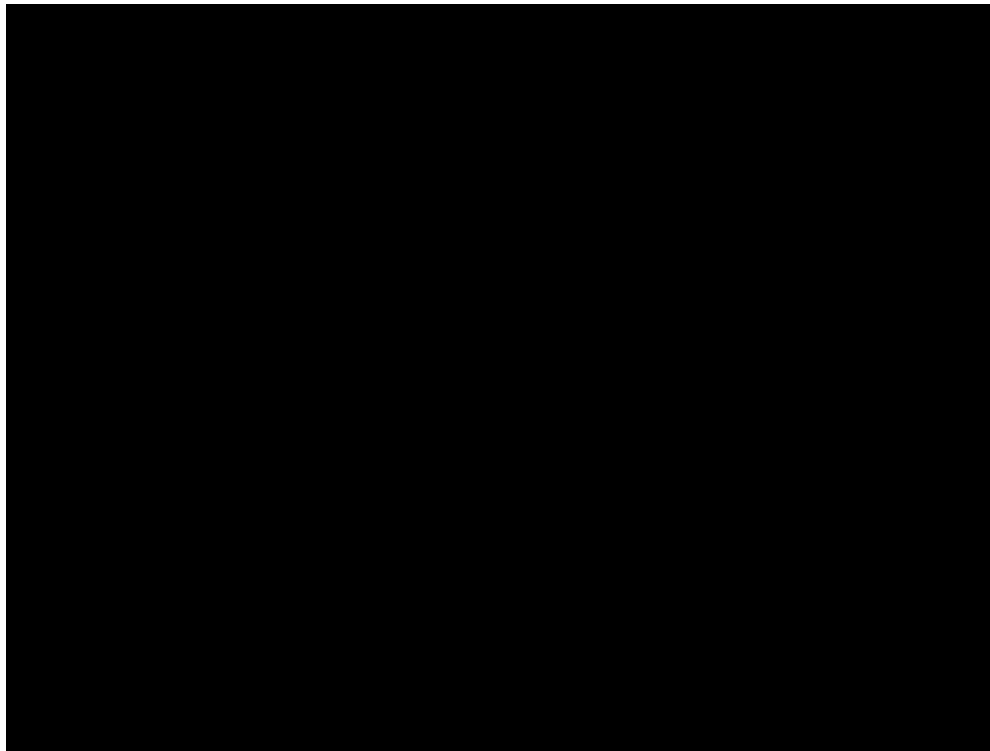
Strategic Planning Misnomers

A strategic plan is **NOT**:

1. A “strategy”
2. An elaborate “vision” or “mission statement”
3. A “wish list”
4. Infallible



Video: Perceptions



Video: Recap

When you miss the **big picture** you also miss:

- Opportunities
- Unanticipated circumstances and events



Strategic Planning Best Practices

1. Address the eight basic steps of a strategic plan.
2. Consider the four logistical dimensions.
3. Keep it simple.
4. Be aware of pitfalls and misconceptions.
5. Reflect the institution.
6. Implement wisely.
7. Evaluate frequently.



Evolution of the Strategic Plan

1. Implement

2. Monitor

- Monitor by committee
- Identify action items
- Establish timelines
- Report, reward, and celebrate goals

3. Adapt

- Review annually... **EVOLVE!**



Strategic Planning Workshop Series

- Strategic Planning: Controlling Your Future
- Case Studies: The Good, Bad, and Ugly
- What's Next?
- Mission, Vision, and Value Statements
- Strategic Planning 101



Q & A

