A Strategic Plan Template

Strategic Planning Terminology	
Accountability	Office(s) performing the actions outlined in the action plan.
Action Plan	Description of action to be performed in support of strategic objectives.
Key Performance Indicator (KPI)	What is your measuring stick? Could be GPA, desired percentage of classroom utilization, increased use of green technology, development of IT system architecture, retention, persistence.....any descriptor appropriately indicative of success of the action plan.
Metric	What form of measurement will be used to determine percentage of completion. Can be quantitative (survey, number of items completed, percentage earned, etc.) or qualitative (observation, document analysis, interviews, etc.)
Performance Target (PT)	Using the KPI descriptor, what is the level of performance or completion desired upon completion of the action plan? For example, student athlete average GPA of 3.75, 95% classroom utilization during the hours of 7:30AM-5:30PM, 100% usage of green technology light bulbs, 100% data entry, 85% retention, etc.
Planning Horizons	*Long-Term (Strategic):* More than 5 years; *Medium-Term (Tactical):1*-5 years; *Short-Term (Operational):* 1 year
Resource Requirements	Can be Financial (existing amount of operating/capital fund, new budget funds, or grant funding) or HR (time and talent). If financial, please provide amount which can be linked to university financial records.
Strategic Planning Model	A graphical portrayal of your strategic planning methodology. Typically, model is not time-bound, meaning it is a representation of how you think through strategic planning. A strategic planning module simply portrays how you receive inputs, how you form outputs, and how you assess results.
Strategic Planning Process	A graphical portrayal of how you do your strategic planning. Typically, the process is time-bound, meaning it is a representation of how you and your teams work through the process of developing your goals, allocate resources, seek budget approval, etc. A strategic planning process may show your annual planning cycle (short-term) and/or a 5 or 10-year planning cycle (long-term.

A 4–Step Strategic Planning Process

1. Where Are You Now?

2. Where Do You Want to Be?

3. How Will You Get There?

4. Did You Make It?
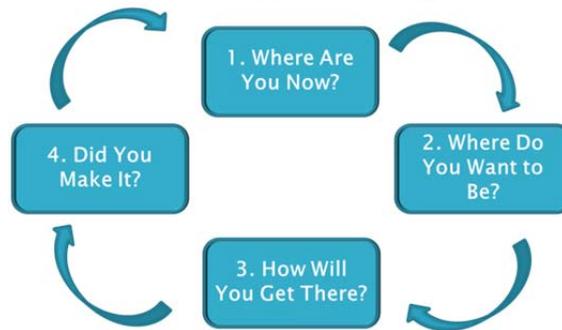
1. **Where Are You Now?**
    a. Consider Your:
        - Mission – what you do
        - Vision – why you do what you do
        - Values – how you do what you do
    b. Strategic Assessment
        - S – Strengths
        - W – Weaknesses
        - O – Opportunities
        - T – Threats
    c. What is the planning scope for your current strategic plan?
2. **Where Do You Want To Be?**

    Strategic Goals: Broad, long-range goals that cover the breath and depth of the organization. Should have 4-10 goals for an organization.
3. **How Will You Get There?**
    a. Objectives: Specific, measurable, achievable, relevant, time-bound (SMART) items associated with a goal.
    b. Action Plans: How you will accomplish each objective (who/what/when/where/how/why)
4. **Did You Make It?**
    a. Evaluation: Steps taken to ensure that the objective and action plans are implemented. Addresses how you will lead, monitor, and refine the plan.
    b. Assessment: Done concurrently so that you have a feedback process for continuous improvement.

Mission Statement – *What You Do*

Vision – *Why You Do What You Do*

Values – *How You Do What You Do*

Planning Scope for the Plan

What is the length of time to be considered for this planning effort?

Any areas of special emphasis?

Strategic Assessment

Based on consideration for both internal and external factors such as:

- Your business unit
- Higher offices
- Regulatory environment
- Shareholders
- Community
- Political environment
- Financial

SWOT Analysis
Strengths – *What are the strengths of the organization?*

Weaknesses – *What are the weaknesses or shortcoming?*

Opportunities – *What potential opportunities (internal or external) exist?*

Threats – *What threats (internal or external) exist that could derail the effort?*

Strategic Goals

Strategic Goals: Broad, long-term goals that cover the breadth and depth of the organization. Should have 4-6 strategic goals for an organization.

Typically, most organizations should address the following areas:

1. Employees/Staff/Faculty – what do you want in terms of your teams (recruiting, hiring, training, developing, staffing, retaining, succession planning, etc.)?

2. Facilities and Resources – what do you need in terms of facilities and resources to provide your services?

3. Educational Services – do you need to expand/sustain/improve/change the services you provide?

4. Financial – what do you need in terms of revenue for your organization?

5. Stakeholder Engagement and Management – are there key stakeholders, either internal or external, that you need to engage with on a regular basis?

Next, copy these goals to the worksheets on the following pages. List out the specific objectives you want to accomplish in order to achieve your goals. Complete the Action Plan for each objective.

Goals, Strategic Objectives, & Action Plans

STRATEGIC GOAL:					
1. STRATEGIC OBJECTIVE 1.					
Action Plan	Accountability	Resource Requirements	Metric	Planning Horizon & Deadline	KPI (Performance Target)
Comments/Notes					
1. STRATEGIC OBJECTIVE 2.					
Action Plan	Accountability	Resource Requirements	Metric	Planning Horizon & Deadline	KPI (Performance Target)
Comments/Notes					
1. STRATEGIC OBJECTIVE 3.					
Action Plan	Accountability	Resource Requirements	Metric	Planning Horizon & Deadline	KPI (Performance Target)
Comments/Notes					

Goals, Strategic Objectives, & Action Plans

GOAL 2:					
STRATEGIC OBJECTIVE 1.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					
STRATEGIC OBJECTIVE 2.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					
STRATEGIC OBJECTIVE 3.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					

Goals, Strategic Objectives, & Action Plans

GOAL 3:					

STRATEGIC OBJECTIVE 1.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					

STRATEGIC OBJECTIVE 2.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					

STRATEGIC OBJECTIVE 3.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					

Goals, Strategic Objectives, & Action Plans

GOAL 4:					

STRATEGIC OBJECTIVE 1.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*

Comments/Notes	

STRATEGIC OBJECTIVE 2.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*

Comments/Notes	

STRATEGIC OBJECTIVE 3.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*

Comments/Notes	

Goals, Strategic Objectives, & Action Plans

GOAL 5:					

STRATEGIC OBJECTIVE 1.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					

STRATEGIC OBJECTIVE 2.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					

STRATEGIC OBJECTIVE 3.					
Action Plan	*Accountability*	*Resource Requirements*	*Metric*	*Planning Horizon & Deadline*	*KPI (Performance Target)*
Comments/Notes					

<div align="center">**Evaluation and Assessment**</div>

Evaluation: Steps taken to ensure that the objective and action plans are implemented. Addresses how you will lead, monitor, and refine the plan.

<u>Leading of the Plan</u>

- Must have consensus within the planning group and the leadership team.

- Communicate your vision, which is the desired end-state you want to achieve.

- Unify your employees towards the desired goals and functional area objectives by including them in subsequent planning efforts.

- Achieve consensus with adjacent units and external stakeholders.

Monitoring the Plan

- Identify any critical events and critical tasks.

- Ensure that the resources you need are in the right place and at the right time.

- Look forward in the plan to identify potential problems.

- Look backward in the plan to ensure that the right actions were taken at the appropriate time that set the stage for future events.

- Ensure that your teams are following the plan as intended.

Refining the Plan

- No plan survives first contact – situations will change and evolve.

- Look ahead to when critical decisions have to be made that could result in refining the plan.

- Be flexible in your execution of the plan.

- Use the decision-making process to continually refine and improve upon the plan.

Assessment: Done concurrently so that you have a feedback process for continuous improvement.

- Metric: What form of measurement will be used to determine percentage of completion and/or success? Should be part of university Assessment Plan.

  - Quantitative (survey, number of items completed, percentage earned, etc.)

  - Qualitative (observation, document analysis, interviews, etc.)

Tied to Institutional Research and University Assessment Committee.

- Key Performance Indicator (KPI): What is your measuring stick? Your benchmark?
  - Could be GPA, desired percentage of classroom utilization, increased use of green technology, development of IT system architecture, retention, persistence.....any descriptor appropriately indicative of success of the action plan.

  - Performance Target (PT): Using the KPI descriptor, what is the level of performance or completion desired upon completion of the action plan?

  - For example, student athlete average GPA of 3.75, 95% classroom utilization during the hours of 7:30AM-5:30PM, 100% usage of green technology light bulbs, 100% data entry, 85% retention, etc.