Strategic by Design: Ensuring Every Plan Leads to Results

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Session Highlights

1. What makes planning truly strategic?

2. Preparing for strategic planning

3. A comprehensive strategic planning framework

4. The action item methodology

5. Methodology and tools to support strategic planning

6. Intentional prioritization

7. Implementing for continuity and evolution

Planning for Success

Critical steps for sustained action

- Plans are aligned with budget allocation and decisions

- Plans identify accountability and clear ownership of actions

- Plans are institutionalized

- Goals are vague without clear metrics

- Plans are not aligned with institutional mission & vision

- Limited stakeholder engagement

- Foster culture change

- Plans are not grounded in data

66%

"Two thirds of strategic enrollment plans in higher education are never implemented"

-Bain & Co. & The Chronicle of Higher Education, 2016

Strategic Planning is:

A systematic collection and evaluation of past and present data, aimed at identification of internal and external forces that may influence the institutional performance and choice of strategies. In addition, it will allow a comprehensive assessment of the organization's current and future strengths, weaknesses, opportunities, and threats.

Ensuring "Strategy" in Planning

"Strategic Planning" Vs. Planning

planning: refers to the process of organizing tasks, resources, and time to achieve a goal

strategic planning: A long-term, high-level process that defines an organization's direction, sets priorities, and aligns resources to achieve mission-driven goals.

Purpose: To ensure long-term success and sustainability by proactively navigating internal and external factors.

Characteristics

- Mission & Vision Focused

- Leadership Engaged with breadth and depth of campus stakeholders

- Data-informed

- Outcome-driven

- Emerges from environmental scan (SWOT) and situation analysis

- Determines accountability, timelines, evaluation, revenue, expenses, and ROI

Organizational Readiness and preparing for the planning project

Readiness Assessment

Reflection Questions

- Is the leadership engaged and supportive?

- Do cabinet members understand and value the need for the plan?

- Is there a willingness / ability to make transformational decisions

- Is the mission clear, shared, and understood?

- Does the vision provide a tangible outcome for the future?

- Is data available, understood, used, and trusted?

- What is the institutional history with strategic planning?

- Is there capacity and willingness to financial support the plan?

- Is the need for the strategic plan driven by urgency or opportunity?

- Will the campus culture accommodate the strategic planning project? *

A campus culture that fosters Strategic Planning

Tangible and Intangible Indicators

- Tangible: communication channels & governance structures

- Intangible: trust, openness, and risk tolerance

Category	Ready	Emerging	Not Yet
Leadership buy-in	✔	⚠	🚫
Trust & transparency	✔	⚠	🚫
Collaboration culture	✔	⚠	🚫
Data-informed practices	✔	⚠	🚫
Stakeholder engagement	✔	⚠	🚫

Strategic Planning Framework

The four-phase recursive process

Discovery

DISCOVERY
- Build structure
- KPI identification
- Data collection
- Situation analysis

Strategy

ACTION PLANNING
- Strategy development
- Tactic identification
- Strategy prioritization
- ROI considerations

Prioritize

PRIORITIZING
- Forecast revenue and expenses
- Written plan finalization

Implement

IMPLEMENTATION
- Monitor, evaluate, and update the plan

Framework: Holistic & Comprehensive

- **Feasibility Studies**
- **Operational Efficiency Assessment**
- **Academic Master Planning**
- **Strategic Enrollment Planning**
- **Institutional Strategic Planning**
- **Financial Modeling**
- **Technology Planning**

What Comes First: the ISP, the SEP, the AMP or …

Old fashion gut check: What keeps you up at night?

Institutional reflection and prioritizing planning cadence

- Is the current institutional mission accurately capturing the organization?

- Is the institution financially solvent?

- What are the primary tools to stabilize the College or University's fiscal position?

- What are the current key performance indicators?

- Avoid planning paralysis and brand your planning efforts to support institutional advocacy.

- Dig into the overlap of the organizational areas.

- Understand your need for annual planning vs. strategic planning.

Involve the right people

- Lead person (or co-lead) who works well with others, has a passion for SEP, and can be the bridge between council and cabinet

- College/University-first thinkers

- Doers

- Early adopters

- Balance of experience and fresh perspectives

- Representation across the structure as a whole to gather buy-in

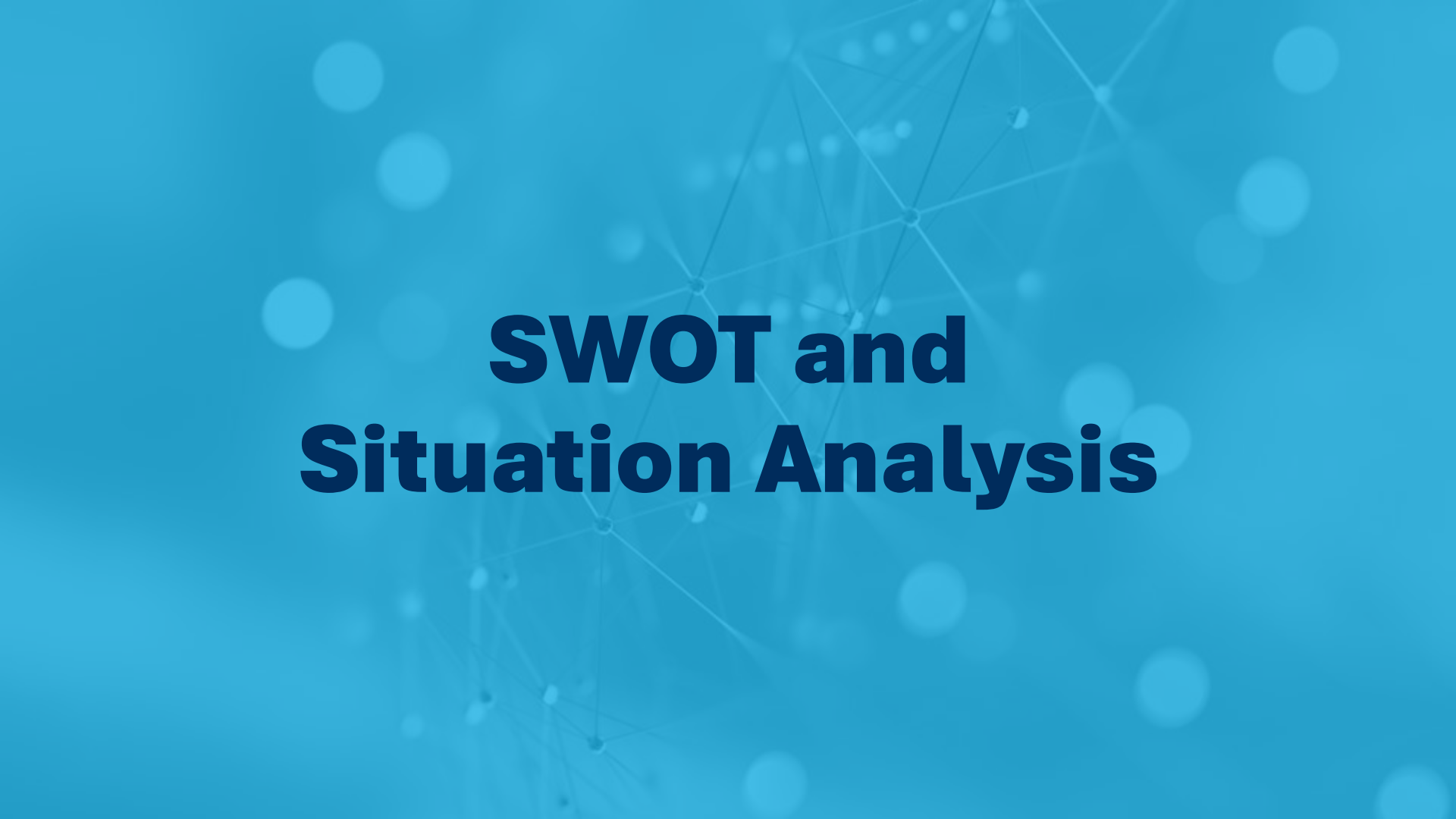# KPIs: Critical to Strategic Planning

The project heartbeat and EKG

- Provides direction for the strategic planning project

- Enables data-informed decision making

- Translates strategy into measurable outcomes

- Monitor progress and performance

- Supports accountability across the institution

- Fosters a culture of continuous improvement

- Helps to communicate success and build trust

Collect, Organize, and Analyze the DATA

- Determine the right data

- Agree to official sources

- Adopt nomenclature and definitions

- Ensure accessibility and integration

- Identify trends, disaggregate, and benchmark

- Connect to decision-making

- Build data capacity and data-informed culture
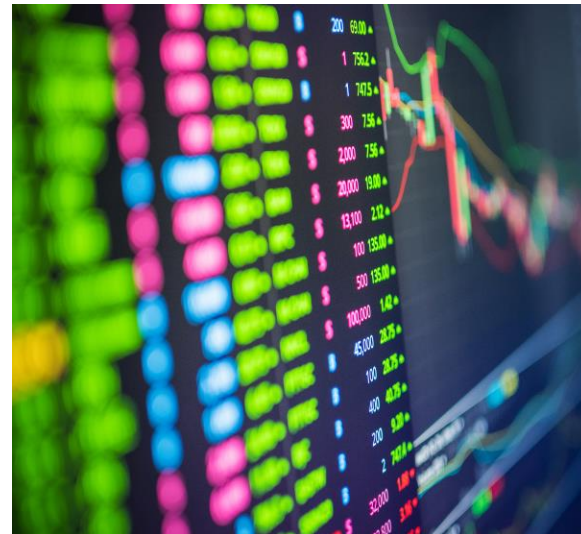
Developing the Situation Analysis

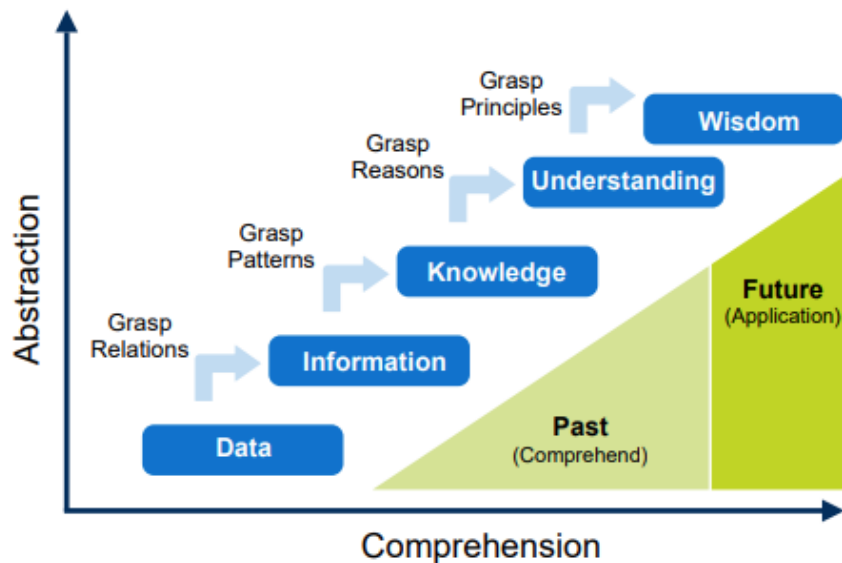## Data to Wisdom Continuum

Figure 4-1 Data-to-Wisdom Continuum

The Situation Analysis, the foundation for strategy ideation

- Provides assessments of the current and projected strengths, weaknesses, opportunities, and threats that need to be addressed in the development of enrollment strategies

- Tells the story of the Key Performance Indicators

- Provides both historical and comparator contexts

- Is a data-informed narrative based on the best quantitative data that is available, and leverages qualitative data and the views of experienced environmental observers

Strategies

Where do they come from?

- The research review and situation analysis

- Existing proposals/ideas

- Creative ideation from SEP team members, and from the broader community

- Known limitations in current marketing, recruitment, and student success practices

Honor all input, but sort and prioritize as you go: strategies for further development; tactical just-do-its; ideas too big for SEP; political non-starters (have a parking lot), studies.

From Strategy Concept to Action Plan

Plan #:

Action Plan Title:

KPI(s):

Overarching Strategy:

Further Description/Explanation:

Implementation Schedule/Timetable

Steps	Responsibility	Cost	Start Date	Completion Date

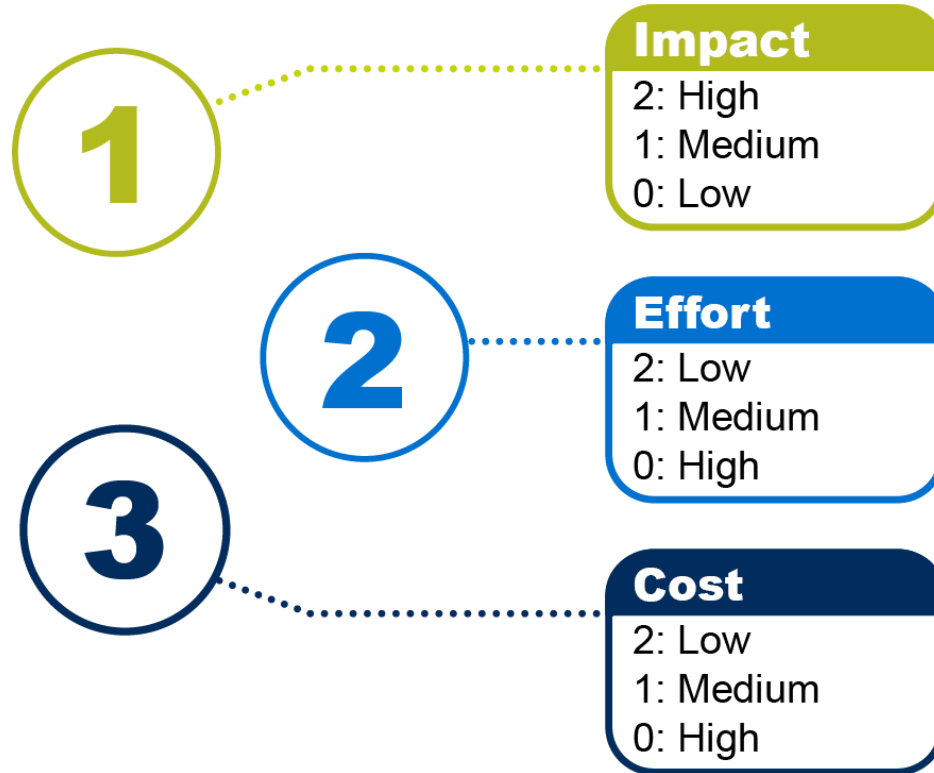Rationale for Estimated Enrollment Impact:

Coordinator:

Evaluation/Assessment:

Revenue & Expenses	Note: Full time salaries (row 12) and adjunct/part time wages (row 14) will auto-populate from the Personnel Detail + tab. Other expense details from the Personnel Detail + tab will need to be re-entered on this sheet.					
Plan #:						
Action Plan/Strategy Title:						
	Projected	Projected	Projected	Projected	Projected	Projected
REVENUE:	**2022-23**	**2023-24**	**2024-25**	**2025-26**	**2026-27**	**2027-28**
Expected Number of Total Incremental Students:	71	125	159	192	226	260
Average Net Revenue per Student:	$2,360	$2,360	$2,360	$2,360	$2,360	$2,360
Re-directed Resources (will auto-populate):	190400	190400	190400	190400	190400	190400
Total Revenue	$ 358,904	$ 485,338	$ 564,928	$ 644,518	$ 724,108	$ 803,698
OPERATING EXPENSE:						
Salaries (will auto-populate from the previous tab):	$ -	$90,000	$92,700	$95,481	$158,345	$223,096
Benefits @ 60.0%	$ -	$54,000	$55,620	$57,289	$95,007	$133,857
Adjunct Faculty/Part Time Staff (will auto-populate):	$ -	$0	$0	$0	$0	$0
Office Expense:						
Travel/Conferences/Conventions (will auto-populate	$ -	$ -	$ -	$ -	$ -	$ -
Marketing/Communications (will auto-populate):	$ -	$ -	$ -	$ -	$ -	$ -
Hospitality Expenses:						
Miscellaneous (will auto-populate):	$ -	$ -	$ -	$ -	$ -	$ -
Total Operating Expense:	$ -	$144,000	$148,320	$152,770	$253,353	$356,953
CAPITAL EXPENSE:						
Equipment & Technology (will auto-populate):	$ -	$ -	$ -	$ -	$ -	$ -
Other (will auto-populate):	$ -	$ -	$ -	$ -	$ -	$ -
Total Capital Expense:	$ -	$ -	$ -	$ -	$ -	$ -
Total Expense:	$ -	$144,000	$148,320	$152,770	$253,353	$356,953
Net Income (loss):	358,904	341,338	416,608	491,749	470,756	446,745
Cumulative Net Revenue (loss)	$ 358,904	$ 700,242	$1,116,850	$1,608,599	$2,079,355	$2,526,100
Net Income per incremental student:		$2,731	$2,625	$2,556	$2,082	$1,719

Prioritizing

Selecting Strategy Priorities

1

Impact
2: High
1: Medium
0: Low

2

Effort
2: Low
1: Medium
0: High

3

Cost
2: Low
1: Medium
0: High

Aligning resources and confirming institutional priority

Strategy	One	Two	Three	Four
Impact				
Effort				
Cost				
Mission				
Resistance				
ROI				

Implementation

The Implementation Cycle

SEP Launch/ Renewal

Reset Projections and Goals

Action Plan Implementation

Update the Plan: Integrate New; Adjust Ongoing; Sunset as Appropriate

Continuous Monitoring, Assessment, and Evaluation

Develop and Vet Potential Strategies

Refresh Situation Analysis

Refresh Potential Strategy List
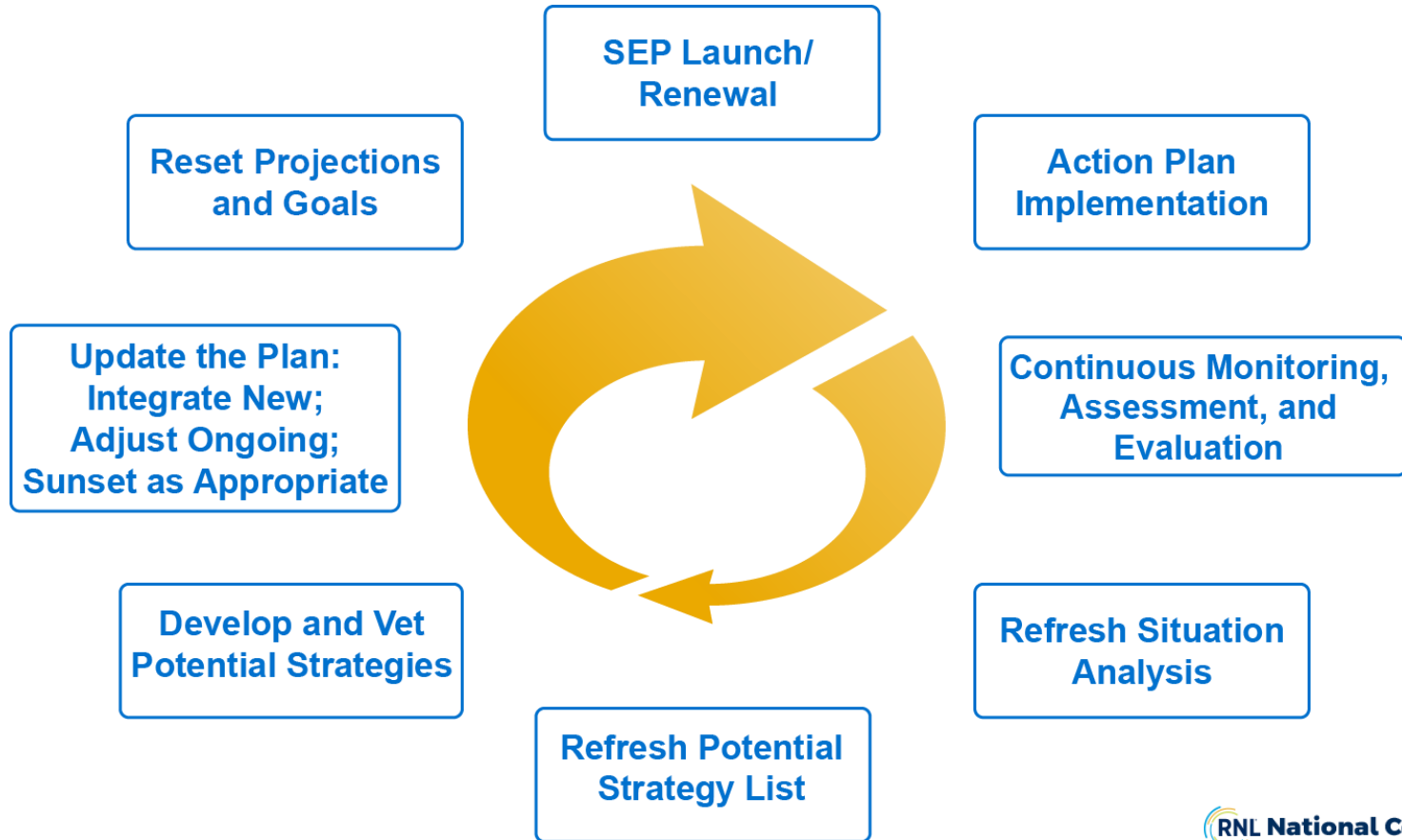
Evaluation, Modification, and Continuation

Planning to Execution

- Fund the plan

- Finalize the goals (based on priorities, budget, and capacity realities)

- Write the plan

- Communicate the plan to campus

- Transition Steering Committee to Implementation Teams

- Build structures – meeting cadence, report distribution, strategy timing

- Build dash boards of AI insights – KPI progress to goals

- Monitor

- Document semester, quarter, and / or annual summaries

- Adjust, refresh, add, discontinue

- Institutionalize the process, the tools and methods for refreshing

Thank you!

STRATEGY

IMPACT

CONNECTION

INNOVATION

RNL NC
ALTERING the
LANDSCAPE

JULY 22-24, 2025
Atlanta, GA

The 39th Annual National Higher Education Conference