

## Strategic Planning Guidelines

### Background

During summer 2005, Self-Study Fellows<sup>1</sup> completed a review of all available Strategic Plans and Mission Statements of Drake University departments and units. This review revealed that almost every major unit on campus, curricular and noncurricular, has an active strategic plan that accords with the University's overall strategic plan. Further, most unit plans follow a similar format, specifying goals and objectives, as well as strategies to attain those goals. The review also identified aspects of plans that are inconsistent with Higher Learning Commission expectations for active planning. For instance, while some plans have been updated, indicating where and how objectives are being achieved, others have not been altered since their inception three to five years ago; some plans identify who is responsible for planning in the unit, or for particular strategies, others do not; and, not all unit plans clearly coordinate with and support the University plan.

After review of the Strategic Planning and Mission Statement Analysis, Self-Study Criterion 2 Committee, "Preparing for the Future," developed the following set of guidelines designed to ensure that all unit plans are consistent with the University plan, are thorough in providing for implementation and follow through, and are regularly updated.

### Guidelines for Updating and Revising Strategic Plans

#### Format

1. Each plan should be prefaced with the unit's mission statement.
2. Each plan should include a mission statement, goals, objectives and strategies.
3. Each plan should identify who is responsible for planning in the unit, as well as who (individual, committee) is responsible for the strategic plan itself.
4. The plan should identify who is responsible for implementing the various strategies specified in the plan.
5. Insofar as possible, the plans should estimate the resources needed to implement a given strategy, perhaps indicating that the item is already funded, will be covered by existing budget or will need additional resources.
6. Wherever possible, plans should reference the University's strategic plan, identifying the particular goals and objectives that their plans are supporting.
7. Each plan should specify the years that the plan covers, e.g., 2006-2009. Typically, plans project three to five years.

#### Process

1. Each year units should provide a progress report on their plans, indicating (with evidence) steps taken toward meeting particular goals and objectives. The plans themselves should be updated every three years.
2. As part of their annual progress reports, units should develop a priority list, indicating which objectives have highest priority each year.
3. By September 1 of each year, units should complete their progress reports. The September 1 date will ensure that the plans will guide budget requests.

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<sup>1</sup> Joe Lenz, Professor of English and Nora Wendl, Director of the Anderson Gallery completed the Strategic Plan and Mission Statement analysis as their Self-Study Fellow project during summer 2005.