Academic Unit
Strategic Planning Program Overview

University Center for Organizational Development and Leadership

www.odl.rutgers.edu
Why Do Department/School-Based Strategic Planning?

- To stimulate dialogue about the organization’s mission, aspirations, and priorities
- To broadly engage faculty and staff in the planning process
- To create a clearer and shared sense of aspiration and future directions
- To establish goals and initiatives for progress toward those aspirations
- To clarify action steps and areas of responsibility
- To define priorities in difficult times
- To provide a foundation for more effective outreach and marketing/fundraising
“Quick-Start” Planning Model for Academic Units

Creating and Organizing the Plan

Mission

Collaborators and Beneficiaries

Vision/Aspirations

Environmental Scan

Goals/Initiatives

Strategies/Projects and Action Plans

Plan Creation

Outcomes and Achievements

A. Leadership

B. Communication

C. Assessment

D. Culture

Why we exist

Why we exist

Who do we depend upon and serve?

Where we want to be, and why

What we need to do to fulfill our aspirations

+’s and –’s

How we will achieve our goals, and who will lead

Where This Approach Has Been Used

- American University, President’s Planning Committee
- University of California, Berkeley, Chancellor’s Cabinet
- UMDNJ, Stuart D. Cook MD Master Educator’s Guild
- Ernest Mario School of Pharmacy – Rutgers NB
- Department of Chemistry – Rutgers NB
- Department of Biomedical Engineering – Rutgers NB
- Rutgers Zimmerli Art Museum, Museum Board – Rutgers NB
- Robeson Campus Center – Rutgers Newark
- Campus Communications – Rutgers Newark
- Center for Advanced Biotechnology and Medicine – Rutgers NB/UMDNJ
Ways the Model Can Be Used as the Basis for a Retreat or Workshop

• As an internally-led workshop/retreat
• As a facilitator-lead workshop/retreat
• As a combination of the two approaches
Typical Retreat/Workshop Options

Prework: Survey faculty/staff on mission, aspirations, goals, etc., as appropriate

Option A (two half days)

Day 1
- Identify department (mission) vision/aspirations looking ahead five years
- Conduct an environmental scan of facilitators and barriers to achieving your vision
- Define the short-term (1-3 years) priority goals/initiatives

Day 2
- Determine strategies/projects that should be initiated in the coming year to move toward achieving your goals
- Develop action plans
- Clarify next steps in planning implementation

Option B (one full day)
Complete all items noted above
Clarifying Our Vision and Aspirations: 
**WHERE We Want to Be and WHY**

- Looking ahead five years, what would we like our department to be like?

- What should be its distinctive and defining characteristics?

- What kind of identity allows us to build on our strengths and traditions, leverage our opportunities, and avoid being undermined by our vulnerabilities and weaknesses?

- How will it be unique, special and unifying in the eyes of faculty, staff, students, the University, and other constituencies?

- What will differentiate our department from our peers?

- What claims (with evidence to support them) do we want to make?
Sample Goals/Initiatives–
What Needs to Be Done

1. Advance the excellence of teaching and learning, with special attention to the assessment of these activities

2. Enhance the quality and distinction of the department in research, scholarship, and education

3. Extend the role and impact of the department in public service and outreach to industry, governmental agencies, and the citizens of New Jersey

4. Broaden department’s visibility and reputation at the state, national and international level

5. Strengthen organization structures, space and facilities, processes and technology to support and advance the department’s aspirations

6. Expand efforts to enrich lifelong relationships with students/alumni including lifelong learning
Action Plan

- Who should be members of the task force/team/committee?
- Who is the logical person to convene/lead the effort?
- What needs to be done? What are the key steps and/or activities that need to be completed?
- What, if any, funding is required?
- How will you communicate your plan and to whom?
- How do you engage colleagues who are not a part of this retreat planning effort?
- What are the deliverables? Timeframe?
- How will you monitor and measure achievement of the goals?
<table>
<thead>
<tr>
<th>Goal # ___________</th>
<th>Strategy Description: ___________</th>
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<tbody>
<tr>
<td><strong>Key steps/activities:</strong></td>
<td><strong>Potential members:</strong></td>
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<td>1.</td>
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<td>5.</td>
<td>Convener:</td>
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<td><strong>Funding considerations:</strong></td>
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<td><strong>Communication and engagement issues:</strong></td>
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<td><strong>Deliverables:</strong></td>
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<td><strong>Timeframe (start-up, milestones, target completion date):</strong></td>
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<td><strong>Effectiveness measure(s):</strong></td>
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<td><strong>How to move the project to action (multiple choice):</strong></td>
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<td>☐ Delegate to existing committee (if so, which one?)</td>
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<td>☐ Delegate to dean’s office</td>
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<tr>
<td>☐ Form task force (chair? members?)</td>
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What Follow Up Is Needed Post Planning Session?

- Finalize planning draft (Review)
- Determine how to move to the next step (Leadership)
- Report on Progress (Communication)
- Consider Incentives (Engagement and Buy-In)
- Schedule semi-Annual or Annual Review and Updating (Assessment)