Strategic Planning Reimagined: Involving Faculty, Students, Staff, and Administrators in a Collaborative Process

MOBTC 2023
at Jacksonville University
June 6th – 9th, 2023

Abstract:

This session will provide an interactive experience in strategic planning for a university in the Midwestern United States. We will discuss the strategy formation, choices, implementation, and evaluation process that we've utilized, incorporating the research we are building upon as well as application of key tools to enhance success. We will include issues and challenges as well as ask for feedback to compare and contrast what others are doing in the strategic planning process. In that way, this session will allow us to 'practice what we preach' in reimagining strategic planning in the University setting.

Keywords: strategic planning, strategy, implementation, evaluation, collaborative

PDW Overview

The purpose of this Professional Development Workshop (PDW) is to share experiences in the process of strategic planning for a Midwestern United States University. The intended outcome will be tools and process recommendations as learnings and takeaways. The target audience ranges from leaders at the University to Department Chairs to faculty who would like to be more involved or have their voices heard. The main topic will be reimagining strategic planning as a truly collaborative process that engages faculty and staff throughout all levels of the University.

Introduction

Strategic planning has been defined as an intentional, organized approach to strategy formulation and implementation (Wolf & Floyd, 2017). As a process, strategic planning is used across organizational settings as a tool to organize and prioritize resource investment and deployment. However, a major shortcoming of many strategic planning endeavors is that priorities tend to emanate from the top management team (TMT) even though strategies often emerge from the interplay between lower-level employees and their key stakeholders (Mintzberg, 1994). Relatedly, although management communicates priorities in a typically formal and intentional manner, employees often draw their own conclusions about the meaning of a directive and respond differently than was the goal of the originator (Sonenshein, 2010). This disconnect often leads to a lack of universal agreement with or acceptance of the key initiatives prioritized by many strategic plans upon implementation. As such, many in industry have become indifferent to the formal process with a recent survey indicating

only approximately 10% of respondents identify as satisfied post-strategic plan rollout (Mankins & Steele, 2006).

This apathy is especially prevalent in complex organizational settings such as the higher education context. Here, like healthcare and community organizations, colleges are considered pluralistic due to the diverse and sometimes competing interests of stakeholders (Spee & Jarzabkowski, 2017). While these constituent groups typically include students, staff, employees, alumni, community members, and board members, differing ideas about the planning process itself as well as what items should be focal points often emerge. In addition, plans often end up more operational or action-oriented in focus rather than truly strategic where differentiation and value creation are prioritized (Gardner, 2021). Finally, stakeholder groups often feel underrepresented in implemented plans as members of top administrative teams and boards typically have final say in the development process.

Thus, this session will explore the strategic planning process in higher education. Specifically, insights from the development process, where engagement and collaboration have been prioritized will be highlighted to address the insularity problem noted above. Further, student engagement to ensure value creation is targeting the key stakeholder group of any institution of higher learning will be detailed. Finally, examples and perspectives gleaned from the process itself as well as workshop participants will be explored.

Learning Objectives

Participants in this session will have the opportunity to:

1. Learn insights from reimagining the strategic planning process to be more collaborative.

2. Participate in an interactive workshop modeled after strategic planning sessions done in the university setting.

3. Engage with others on how we (as a collaborative in higher education) can add value to key stakeholders (students, the community, faculty/staff, etc.)

Engagement and Takeaway

This will be a highly interactive workshop that will include an icebreaker, small group discussions, and a flip chart/post-it note exercise. The target audience will not only learn from insights and recommendations from implementing the strategic planning process at our university, but will also have the chance to analyze their own college/university identity, vision, and goals to think about how they can create value in the future. Specifically, we will discuss a collaborative process that builds upon the key ideas of flourishing in building relationships and supporting growth (Blum, 2021; Colbert, Bono, & Purvanova, 2016). Moreover, participants will have the chance to share ideas from their own experiences and discuss how higher education as a whole can better create value for those we serve.

Session Description and Plan

A 60-minute session is requested but more or less time could be utilized if necessary.

Specifically, the timeline for the session will be as follows:

1. Introduce presenters and topics (5 minutes)

2. Overview of strategic planning and icebreaker (5 minutes)

3. Strategic Planning Reimagined (15 minutes)
   a. Formulation – Creating Value in Higher Ed Context
   b. Choices – Determining What and How
   c. Implementation – Objectives and Key Results
   d. Evaluation – Assessment and Celebration

4. Workshop Strategic Planning (25 minutes) – *materials*: whiteboard, flip charts, post-it notes
   a. College/University Identity Capture: Why _____?
   b. Key Stakeholder Discovery: Who Matters? Why?
   c. Value Creation Exercise: How to Create Value?

5. Group Discussion (10 minutes)
   a. Flourishing in Higher Ed
   b. Comparison and Feedback

6. Debrief and Conclusion (5 minutes)
   a. Sharing of best practices
   b. Questions and conversation of issues and challenges
   c. Future steps

This session provides a process plan that builds upon research in strategic management to suggest implementation practices for strategic planning in higher education. We provide an opportunity to discuss how strategic planning can be done effectively using what we know from the academic literature and practice and drawing upon insights we've learned in the faculty-driven process at our university.

References

Blum, D. (2021, May 6). The other side of languishing is flourishing. Here's how to get there. *The New York Times*, from https:/ /www.nytimes.com/2021/05/04/well/ mind/flourishing-languishing.html

Colbert, A.E., Bono, J.E., & Purvanova, R.K. (2016). Flourishing via workplace relationships: Moving beyond instrumental support. *The Academy of Management Journal,* 59 (4), 1199-1223.

Gardner, L. (2021, October 25). The truth about strategic plans. *The Chronicle of Higher Education.* Retrieved November 2, 2022, from https://www.chronicle.com/article/the-truth-about-strategic-plans

Mankins, M. C., & Steele, R. (2006). Stop making plans; start making decisions. *Harvard Business Review*, 84(1), 76-84.

Mintzberg, H. (1994). The fall and rise of strategic planning. *Harvard Business Review*, 72(1), 107-114.

Sonenshein, S. (2010). We're changing—Or are we? Untangling the role of progressive, regressive, and stability narratives during strategic change implementation. *Academy of Management Journal*, 53(3), 477-512.

Spee, P., & Jarzabkowski, P. (2017). Agreeing on what? Creating joint accounts of strategic change. *Organization Science*, 28(1), 152-176.

Wolf, C., & Floyd, S. W. (2017). Strategic planning research: Toward a theory-driven agenda. *Journal of Management*, 43(6), 1754-1788.