

Best Practices: Implementation of a Strategic Plan

Recommendations from the Society for College and University Planning (SCUP)

The Big Questions that Annual Monitoring Asks

- Are we on track to achieve goals/objectives?
 - If we are, do we need to set new, more ambitious targets? Or do we need to focus on goals/objectives not yet achieved?
 - If we aren't, why not? What are the barriers?
- Are goals still realistic? Objectives? Action Steps?
 - If not, what needs to be changed? (resources, deadlines, or even the goals?)
- Are the goals/objectives still prioritized as they should be?
 - If not, what needs to be prioritized?
- What's working with the implementation process? What isn't working?

- Insufficient resources
- Increased competition or changes in the external environment
- Change in institutional priorities or economic status
- New leadership
- Lack of appropriate technology
- Poor management
- Lack of stakeholder buy-in
- Poor communication and coordination

Examples for reporting techniques

- Example #1: Champions review progress from the previous year and develop a draft list of priorities related to their goal for the upcoming year. They base priorities on budget projections, new challenges, and relevant information.
- Example #2: Champions evaluate goal progress by answering two questions – are we on track with this goal? If not, what must we do to get back on track over the next year?
- Example #3: Champions discuss:
 - Have action steps been completed on time?
 - Do we need to allocate resources to support tactics running behind?
 - According to metrics, how much progress are we making....and why?
 - Do we need to adjust action steps?
 - Do we need to adjust any metrics? (for example, maybe metric chosen isn't giving you the info you need)

- Tips: Prior to an annual meeting, the implementation team should review the results of the environ scan and internal scans from the beginning of the strategic planning process to determine if there have been changes and how they have affected the institution plans.
- Question: What do you do about new opportunities that come up in the middle of plan implementation? Is there a template that can be used to propose new initiatives?