



# KEYS TO A SUCCESSFUL STRATEGIC PLANNING PROCESS

## Visible Leadership

The institution's executive leadership, including the board chair, are fully committed to visibly supporting the strategic planning process. For units within an institution, senior leaders visibly lead the process. Board and top management are willing to articulate constraints and nonnegotiables up front.

## Mission Stability

No high-impact decision (e.g., a major funding or policy change; organizational restructuring) is about to be made that could dramatically change the organization's core mission.

## Inclusive Process

Leaders are committed to an inclusive process that engages stakeholders in a manner that generates buy-in and excitement about future possibilities.

## Resources & Budget Process

Top leadership commits resources to the process (e.g. time, funding, data). Leaders intend to tie the outcomes of the planning process to the annual budgeting process.

## Lessons Learned

Lessons learned from previous planning processes are considered.

## Experts Engaged

Individuals with specific skills in planning and facilitation are sought, either from within the organization or from outside; and/or there is a commitment to training team members who will lead the process.

## Plan the Plan

Time is spent planning the plan, including communicating to all stakeholders the process, roles, expectations, and intended outcomes.

## Guiding Team

A team is established to guide the planning process. Ideally, the group is between 4-12 people; are representative of stakeholders; comprised of both big picture thinkers and detail-oriented doers; and can work together well while having the ability to speak up, challenge assumptions, ask hard questions, and disagree.

**Environmental Scan** Individuals leading the process are willing to consider relevant data and trends about internal processes and external environments that will inform the planning process.

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**Alignment** Leaders are committed to aligning the plan with requirements from accreditors and other governing bodies.

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**Strategy Focus** Leaders of the planning process are relentless in focusing on strategic priorities in order to avoid creating a document that is everyone's wish list. Strategic priorities are not operational. Instead, they articulate the vision for the future, which usually requires change.

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**Metrics** The planning process includes designing objective measures that will indicate goal achievement.

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**Flexibility** Leaders of the planning process communicate that the strategic plan is a living document that will be adapted as needed.

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**Accountability** Lead implementors are assigned responsibility for the facilitation and completion of the plan's goals.

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**Promotion** Leaders and champions continually promote the strategic plan by looking for opportunities to speak to its importance throughout its implementation.

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**Planning Mindset** A strategic planning mindset is embraced by intentionally reflecting on planning practices in order to celebrate the plan's successes, embrace opportunities for continuous improvement, and inform the next planning process.

## Sources

Allison, M. & Kaye, J. (2015). *Strategic Planning for Nonprofit Organizations: A Practical Guide for Dynamic Times*. Wiley.

Seymour, D. (2024, April 3). *The Strategic Planning Checklist - 17 Critical Mistakes to Avoid in Higher Education* [webinar]. The Society for College and University Planning. <https://www.scup.org/resource/the-strategic-planning-checklist/>

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