

Navigating Higher Education Strategic Planning Challenges

David Wilsey
Chief Executive Officer

Dr. Shane Sokoll
Senior Consulting Associate

Introduction

In the ever-evolving landscape of higher education, institutions must continuously adapt to meet the diverse needs of students, stakeholders, and society at large. During the pandemic, higher ed leadership teams faced unprecedented challenges. Tasked with protecting students, faculty, and staff as best they could, institutions had to quickly pivot to online learning models, with mixed results. And efforts to develop and enforce safety policies and procedures were often impeded by conflicting stakeholder priorities. The lack of in-class and other social interactions dramatically reduced the quality of students' college experience. This disenchantment sometimes led students to pause their educational efforts, significantly impacting institutions' financial picture.

As we move on beyond the worst of the COVID 19 experience, one might conclude that job pressures have eased for higher ed leaders—but nothing could be further from the truth. Professionals in this sector continue to struggle with pre-pandemic issues that have intensified over the past couple of years, such as:

- Enrollment declines, often due to potential students' resistance to what has become an overwhelming financial burden
- Financing constrictions, driven partly by enrollment declines and exacerbated by funding cuts and decreased endowments

As if these challenges were not daunting enough, new post-pandemic problems have emerged, making higher ed leaders' roles even more complicated, including:



- Heightened political polarization, with administrators often left to act as referees between stakeholders' conflicting agendas
- Concerns about the potential impact of artificial intelligence technologies on teaching and grading students' assignments
- Increased skepticism of the value and ROI of a college degree by parents, students, and employers, with many learners opting for apprenticeship programs and certifications instead of college degrees
- Increased pressure from the skills-based hiring movement, with groups like Indeed, Accenture, and state governments now searching for potential candidates who can do the job without a degree in place of college degree requirements
- Dissatisfied staff members, more than half of whom are considering quitting their jobs, according to the [Chronicle of Higher Education](#)

To overcome these challenges, leadership teams create strategic plans to guide their institutions toward desired goals and aspirations. However, the path to effective strategic planning in higher ed is fraught with challenges that demand innovative solutions. This article delves into some of the most pressing strategic planning challenges faced by higher ed institutions today and proposes strategies to overcome them.

Challenge 1: How to Systematically Embrace Change

The rapid advancement of technology, globalization, and shifting student demographics have transformed the educational landscape. Institutions must grapple with how to stay relevant and meet the changing demands of students while maintaining their core values. To address this challenge, institutions can embrace flexibility and agility in their strategic planning processes. Regularly reviewing and updating strategic goals to incorporate emerging trends can ensure that institutions remain adaptable.

Challenge 2: How to Balance Tradition with Innovation

Many higher ed institutions have rich traditions and histories that can sometimes clash with the need for innovation. Striking a balance between preserving institutional identity and fostering innovation can be tricky. By involving diverse stakeholders in the strategic planning process—faculty, students, alumni, and community members—schools can ensure that both traditional values and innovative approaches are integrated.

Challenge 3: How to Strategically Allocate Limited Resources

Limited financial resources often impede the execution of strategic plans. Developing innovative revenue streams, seeking partnerships, and leveraging technology can help institutions do more with less. Systematically prioritizing initiatives based on their alignment with the institution's strategy can help allocate resources more effectively.

Challenge 4: How to Facilitate Faculty and Staff Buy-In

Engaging faculty and staff in the strategic planning process can be challenging, as they have busy schedules and diverse perspectives. Getting numerous, diverse stakeholders who may have wildly conflicting priorities to work as a unified team can be like herding cats. Building a culture of inclusivity and shared ownership in the planning process is crucial. Regular communication, open forums for discussion, and providing opportunities for input can foster a sense of ownership and commitment among faculty and staff.

Challenge 5: How to Impose Strategic Planning Discipline

As many leadership teams have learned, strategic planning in higher ed has some unique challenges. Time-consuming meetings with very smart people do not always yield consensus on a strategy, much less a viable implementation plan. And if a plan is developed, it may end up as just another static document rather than a living, transformative roadmap that leads to achieving critical university goals. Developing a systematic approach to strategic planning is essential for higher ed institutions to navigate the complexities of their environment and achieve their long-term goals.

A Systematic Approach to Higher Ed Strategic Planning

Strategy Management Group (SMG) employs a disciplined [Nine Step methodology](#) that enables higher ed clients to overcome these challenges. Here are a few of the guiding principles included with SMG's approach to creating and implementing a strategic plan:

Establish a Strategic Planning Committee

Assemble a diverse group of stakeholders, including faculty, staff, students, administrators, alumni, and community representatives. This committee will bring a range of perspectives to the planning process.

Find the Right Internal Strategy Champions

The right internal champion can make or break the strategic planning process, as they become the internal process expert, communications conduit between various stakeholders, and organizer of logistics. Beyond the leader of the planning effort, you should also identify internal strategy champions from both faculty and staff units.

Representation from each of the colleges of a university will be especially important for getting faculty buy-in, as you work toward the goal of shared governance.

Engage Stakeholders

Involve stakeholders throughout the planning process to gain buy-in and ensure diverse perspectives are considered. Conduct surveys, focus groups, and town hall meetings to gather input on strategic goals and initiatives. Practice inclusivity and build collaboration to form consensus among all stakeholders—faculty, students, board members, and key community members. Too often, departments operate in silos, unsure of the plan's goals, much less how to work together to achieve them. But when you prioritize collaboration, inclusion, and transparency, you promote engagement and commitment to developing and carrying out your plan. For faculty and staff, a sense of shared mission can help boost job satisfaction while supporting accountability and responsibility for the plan's success. For students, knowing their voices matter supports retention and engagement. And community buy-in can go a long way toward reducing any conflicts of interest and ensuring strategic planning success.

Assess the Strategic Environment

Gather relevant data to assess the institution's current strengths, weaknesses, opportunities, and threats (SWOT analysis). Evaluate internal factors like resources, faculty expertise, and infrastructure, as well as external factors such as competition, demographic trends, and regulatory changes.

Define Mission, Vision, and Values

Clearly articulate the institution's mission (its purpose and reason for existence), vision (desired future state), and core values (fundamental beliefs guiding behavior). These elements provide a foundation for all strategic decisions.

Create Consensus Around Strategic Intent

Based on the strategic assessment and the institution's mission, vision, and values, define broad strategic goals or themes. Prioritize a manageable number of goals to ensure focused efforts. Broad themes are broken down into continuous improvement actions called strategic objectives.

Maintain Balance

Work towards a balanced strategy in all senses of the word: balance between various stakeholder needs, between internal versus external, and between short-term concerns versus long. As you formulate your strategy, make a connection between different objectives across four areas: students' needs, financial results, internal processes, and organizational capacity. This holistic approach will help you create a comprehensive strategy map that clearly articulates your institution's goals and the plan to achieve them. As you refine, you will confine your strategy to your top-priority goals. Trying to meet too many goals can stretch your resources beyond their limit and make it difficult for stakeholders to understand and focus on what is most important.

Develop Actionable Initiatives

Break down each strategic objective into actionable initiatives or projects. Assign responsibilities, allocate resources, set timelines, and establish performance indicators for each initiative.

Allocate Resources

Allocate financial, human, and technological resources to support the implementation of initiatives. Align resource allocation with the strategic priorities to ensure efficient execution.

Measure and Monitor Progress

Begin executing the initiatives according to the established timelines. Monitor progress towards strategic objective achievement using key performance indicators (KPIs). Make necessary adjustments as challenges arise.

Communicate Transparently

Communicate the strategic plan to the entire institution and stakeholders. Transparency helps foster a sense of ownership and commitment among faculty, staff, students, and other relevant parties.

Evaluate and Adjust

Periodically review the strategic plan's progress and assess whether initiatives are on track to achieve their intended outcomes. Use data-driven insights to identify areas of success and areas needing adjustment.

Celebrate Achievements and Learn from Failures

Celebrate successes and milestones reached along the way. Equally important, learn from initiatives that did not go as planned, using them as opportunities for growth and improvement.

Continuously Improve

Use the lessons learned from the implementation of the current strategic plan to inform the development of the next iteration. Continuous improvement ensures that the institution remains relevant and effective.

Conclusion

The challenges of strategic planning in higher ed are complex and multifaceted, but they are not insurmountable. Institutions that prioritize inclusivity, adaptability, innovation, and data-driven decision-making are better equipped to navigate these challenges successfully. By following a systematic approach to strategic planning, higher ed institutions can create a roadmap that guides their actions, aligns their efforts, and positions them for success in a dynamic and ever-changing landscape. Through collaboration, thoughtful consideration, and a commitment to their mission, these institutions can shape the future of education for generations to come.

Higher Ed Consulting from the Strategy Management Group

Many higher ed organizations find that it is a daunting task to integrate planning, strategy, and transformation capabilities across their institutions without support. Strategy Management Group provides a comprehensive and time-tested framework that helps “connect the dots” between strategic planning, budgeting, operations, and management, all while satisfying accreditation requirements for continuous improvement.

Our experienced facilitators collaborate with you every step of the way, from your current-state evaluation to the creation, implementation and iteration of a strategic plan designed to address your unique environment. By providing a visible connection between your day-to-day operations, the measurements you are using to track success, your strategic objectives, and your mission, vision, and strategy, your institution’s transformation process becomes quicker, more efficient, and more effective.

We have consulted with more than 400 clients in more than 80 countries worldwide, with successful engagements at higher ed institutions such as the Concordia University Texas, University of Houston Clear Lake, the University of North Carolina at Greensboro, SUNY Upstate Medical University, Holy Family University, Saskatchewan Polytechnic, the University of Texas Medical Branch, the University of the West Indies, Purdue University IT, and the Eastern Gateway Community College.

About the Author

David Wilsey is a strategic planning and performance measurement specialist and thought leader and co-author of *The Institute Way* and the *Association for Strategic Planning SMP/SPP/SPA Certification Exam Study Guide*. He has over 20 years of experience in a wide range of fields including consulting, training, engineering, website design, marketing, manufacturing, design, programming, research, education, and multimedia production. He currently serves as Chief Executive Officer for the Strategy Management Group.

Dr. Shane Sokoll, with 18+ years in higher education, is a visionary leader and seasoned strategy and organizational development consultant. He demonstrates exceptional skill in guiding leaders, teams, and organizations to unlock their full potential for achieving peak performance. Renowned for his innovation and dedication to others' success, Shane has held pivotal roles as Academic Center Dean, Full Professor in Business, Senior Fulbright Scholar / Citizen Ambassador to Spain, Senior Executive, Chief Strategy Officer, and leadership coach. His diverse consultancy spans academia (state and private universities, K-12 ISDs, and community colleges), healthcare, manufacturing, nonprofits, government, retail, technology, etc., offering exceptional insights across sectors.

About the Strategy Management Group (SMG)

SMG provides consulting, training, and professional certification services to organizations worldwide related to strategic planning, balanced scorecard, KPI/performance measurement, and strategic project management.

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