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Don't be afraid to give up on a goal that has proved overly ambitious, and other advice for administrators on strategic planning.

One of the great paradoxes of higher-education leadership is that most of us who find ourselves in administrative positions have not studied the kind of work we end up doing on a day-to-day basis.

We manage budgets without understanding financial theories. We work with people but never learned interpersonal communication principles. And we carry out new strategic plans without even looking at the research on the relationship between planning and performance outcomes.

To my embarrassment, I have been strategically planning without a license and without a guidebook for most of my career. It is only in the past three months — as a buildup to writing these essays on the subject — that I realized that and recruited a doctoral student to help me review the literature on strategic planning. What we found: Only a small portion of it focuses on higher education compared with a much larger collection for commercial businesses and K-12 schools.

In short, most U.S. colleges and universities — including those that loudly trumpet their research capabilities — are regularly engaged in a massive task that is accorded large resources of people, time, and money and is considered critical to our survival and prosperity but for which there is not a great deal of solid research supporting the task's efficacy in a campus setting.

This essay is not an argument against strategic planning. Instead this is a call for higher standards and deeper thinking about strategic planning in higher education. The extensive research for other sectors points to the effectiveness of good planning, so it could and should be equally helpful on a college campus. The Admin 101 columns on this subject — Part 1 on preplanning and Part 2 on managing the plan-writing process — is an attempt to foster that conversation.

Now Part 3 turns to how best to carry out a strategic plan you've just adopted, whether for an entire institution or within one of its departments or colleges.

**Some goals are measurable; some aren't.** One of the negative charges often made against strategic plans is that they state goals or priorities that are mainly for public-relations purposes — 'feel good' exercises rather than concrete outcomes. A prime example is the sort of vague language that proclaims, 'We will enrich the undergraduate experience,' but fails to tightly define what 'enrich' means or what actual steps will be taken.

To be meaningful, a plan has to have measurable goals. And those goals have to be things you can analyze 'before and after' to gauge their success.

That doesn't mean there's no place for feel-good goals, so long as you are not deceiving people. For example, say your plan includes this goal: 'Get greater input from staff about improving the campus climate.' The metrics to assess whether you've achieved that goal, within the time frame of the plan, will be very different from a more-specific strategic goal like 'increase dorm space for first-year students 20 percent by 2025.'

Still, you can assign simple resources to the feel-good goal without a vast investment of time, money, staff, and the like. The metrics might include things like devising a campus-climate survey and holding town-hall meetings on the topic. That way, you can achieve a realistic goal — and perhaps even make people feel better about the place.

**Put someone in charge of, and accountable for, each outcome.** Whether you are carrying out a strategic plan as a department, a college, or a campus, the buck has to stop somewhere with somebody. But not all the bucks have to stop with the same person at every level.

After all, people have varied expertise: They each know (and care) about distinct segments of what a campus does and can do. Each part of a strategic plan needs to be carried out by someone who has clear authority to manage the task and be held accountable.

On occasion, however, someone in charge of a certain goal ends up busy and distracted by other work, and thus, not as dedicated to the planning enterprise as necessary. That's why the top leader in charge of the plan has to be constantly vigilant. That leader must seek periodic progress reports and set expectations, early on, for what should be achieved by deadlines along the way, and not just by the end date of the plan itself.

A faculty member at a small liberal-arts college told me that someone in charge of a piece of its strategic plan had 'completely dropped the ball' (i.e., did no work whatsoever for years). But nobody found out for a long time because there was no monitoring along the way from the higher-ups. Lesson: Make sure someone is monitoring the monitors.

**Give people what they actually need to reach the goal.** One of the most common reasons why strategic planning fails is a mismatch between goals and support — a conclusion that is extremely clear in the general research on the subject.

In a previous job, I worked at a university that set a typical strategic-planning goal: Increase the number of full-time faculty members at the institution. Ultimately, the university achieved its goal — but only after many setbacks and a lot of trouble-shooting.

The problem: The university had budgeted money for the goal based on hiring people at a national median salary. But of course, few academics earn that median salary (some make more, some less). Among other problems: The salary data was years out of date; there was no coordination among the areas that needed to do the most hiring; and, perhaps worst of all, start-up packages, moving costs, and spousal accommodations had not been included as part of the future costs.

On the plus side, administrators and faculty leaders worked together to come up with fixes that would achieve the goal fairly. One of the solutions: Promote existing adjunct faculty members to better-paid, full-time teaching positions. Such local hires helped offset the costs of hiring research faculty members nationally. Since the local hires were already employed on the campus, part of their salaries was already in the budget; moreover, the university saved additional money by not having to pay any moving costs for them. The budget was balanced; the goal was reached.

**Don't be afraid to give up on a goal.** Strategic plans are often political hot potatoes, with good reason. Administrators (along with everybody involved in making the plan) recoil at the idea that any part of it will be considered a 'failure.'

To avoid that embarrassment, a common expedient is to front-load success. That is: Claim you want to achieve a goal far down the road that you are already on the verge of achieving.

I remember reading the strategic plan of a university that asserted 'We want to be Top 20' and noticing they were close to that already. Further, in small print, the institution sought Top-20 status in an index of which I had never heard. Another example is in fund raising when a university proclaims: 'We want to raise [insert very large amount].' Not uncommonly, the institution has already lined up pledges approaching the goal.

Still, most of the goals in any strategic plan are not shoo-ins. And maybe that's not a bad thing.

From the point of view of audience perception, trumpeting that 'we are always successful, all the time' strains credibility. The best academic leaders I know have no trouble stating publicly: 'We are going to have drop activity B to help us achieve activity C.'

Don't be afraid to jettison a part of the plan that is turning out to be too difficult, too complicated, or too outright expensive. Be honest and clear: This was a good idea that may be actualized someday, but right now, other priorities take precedence. Don't let pride get in the way of success for the bulk of the plan.

**Publicize the plan consistently, not just at the beginning.** Strategic plans tend to follow a familiar publicity model. They start off with a tremendous amount of fanfare — hailed in signs on the sides of campus buses, lauded in town halls hosted by the president, featured in glossy campus brochures. Two or three years down the road, however, the publicity has died down and the average faculty member or student stopped on the quad would have a hard time naming even one of the plan's priorities.

Accordingly, your 'marketing department' — even if that amounts to a department chair, an administrative assistant, and a few faculty members — should plot how you periodically will call attention to the plan throughout its life span.

Think ahead and lay out a schedule of dates for meetings and publications to update people on the plan's progress. The theme could be, 'How Are We Doing?' and your inspiration could be similar to those thermometers used to measure charity-drive progress. Renewed focus will also boost the morale of people and committees tasked with carrying out various parts of the plan: You are reassuring them that they are not forgotten.

Strategic planning is incredibly complicated on a college campus — but even more so now because, as I have personally experienced, the vast majority of institutions simply don't have the money to achieve all of their dreams and aspirations. But that doesn't mean we shouldn't dream and aspire.

Note: I want to thank Lori Tribble, a doctoral student in management at Texas Tech University, for working to review the strategic-planning literature.

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PHOTO (COLOR): Careers-Career-Confidential

## Footnotes

*1 For Twitter: Don't be afraid to give up on a goal that has proved overly ambitious, and other advice for administrators on strategic planning. A common criticism of strategic plans is that they list goals mainly for public-relations purposes — 'feel good' exercises rather than concrete outcomes. One of the most common reasons why strategic planning fails is a mismatch between goals and financial support.*

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By David D. Perlmutter

Reported by Author

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