

STRATEGIC PLANNING
FOR
HIGHER EDUCATION

by

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Strategic Planning Worksheets for Higher Education

The following worksheets are based on the book *Strategic Planning for Private Higher Education* (The Haworth Press, 1997). Page numbers in parentheses refer to this book. By completing the tasks that follow, you will help your institution develop a strategic plan.

YOUR PRESENT UNIVERSITY PURPOSE/MISSION STATEMENT (pp. 51-69)

Note the sample university purpose/mission statements on the following pages.

SAMPLE MISSION STATEMENTS

OKLAHOMA STATE UNIVERSITY

Oklahoma State University is a land-grant university that focuses on people and opportunity, is endowed with a sacred trust: to develop and transmit knowledge and culture, the light of today, to our students and society, the light of our future. Our success in this endeavor will require the concerted efforts of OSU faculty, staff, students, alumni, and supporters. With focus, determination, and mutual respect, we shall make OSU the University of Choice in Oklahoma.

Our purpose must hold that we commit to excellence in this endeavor. The citizens of Oklahoma expect nothing less from us, and working together, we shall meet their expectations. We are the stewards of a cherished institution: “Oklahoma State—The University of Choice in Oklahoma.”

UNIVERSITY OF CALGARY

Within this general context, the University of Calgary declares its “purpose” more specifically through the Mission Statement. The purpose of the university as a place for scholarly inquiry and discussion lies at the heart of this mission statement. The mission acknowledges many of the challenges universities face as they strive to uphold and fulfill their purpose. On one hand, for example, a university enables new theories and practices to evolve, and thus it plays a leadership role within society. At the same time it faces pressure to be responsive to various and competing demands in society. This tension between a need to be independent and proactive within society and an expectation to be responsive to society has a long history. Increasing pressures for pragmatic results, although important, can endanger the university's ability to pursue its primary purpose. We continue to face the challenge of finding a dialect balance which propels us forward.

The mission statement asserts the right of the University of Calgary to independence from government direction while at the same time it accepts its responsibility to the community at large and its elected representatives.

Sample Mission Statements, continued:

TULSA COMMUNITY COLLEGE

Tulsa Community College has always affirmed its belief in the growth and worth of the whole person as an individual and as a member of society. The College promotes education as a continuous improvement process that contributes to an enriched human experience and professional career development. Tulsa Community College's twenty-seven years of tradition have proved its dedication to providing quality education that responds to the needs of the community and to the needs, interests, and abilities of individuals within the community.

Society, however, is undergoing a fundamental transformation from the Industrial Age to the Information Age. This is a global phenomenon with very significant implications for our community and college. The goals and objectives presented herein are intended to provide all of our students, faculty, and staff, both full- and part-time, with the vision needed to embrace the new and continually evolving teaching-learning paradigms brought about by this transformation. The Strategic Vision reaffirms Tulsa Community College's rich tradition as expressed in its philosophy and institutional mission statement and points to a future that is challenging, exciting, and hopeful.

HILLSDALE COLLEGE

Hillsdale College is an independent, nonsectarian institution of higher learning founded in 1844 by men and women “grateful to God for the inestimable blessings” resulting from civil and religious liberty and “believing that the diffusion of learning is essential to the perpetuity of these blessings.” It pursues that stated object of the founders: “to furnish all persons who wish, irrespective of nation, color, or sex, a literary and scientific education outstanding among American colleges and to combine with this such moral “and social instruction as will best develop the minds and improve the hearts of its pupils.”

EXTERNAL ENVIRONMENT ANALYSIS WORKSHEETS (pp. 106-109)

Λ *Look for trends—what is going on now and how this relates to past trends that have influenced your institution's performance. List key opportunities and threats for each of the following environmental sectors:*

A. GOVERNMENT

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

B. ECONOMY

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

C. TECHNOLOGY

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

D. SOCIAL TRENDS

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

E. STUDENTS

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

F. FUNDING SOURCES/SPONSORSHIP

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

G. COMPETING EDUCATIONAL INSTITUTIONS

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

Λ *Next, evaluate your external analysis:*

- Have you listed several international/national trends that affect the institution?

- Have you listed several local trends that affect the institution?

- Have you identified trends unique to your institution?

- Have you listed several of your most important competitors? What is distinctive about them?

- Which competitors are growing, becoming stronger?

- Which competitors are declining?

- What are the successful ones doing to cause their growth/vibrancy?

INTERNAL ANALYSIS WORKSHEETS

A. MANAGEMENT AND PLANNING SYSTEMS (pp. 109-112)

Λ *Use these questions to help you prepare your strengths and weaknesses list for the management and planning systems portion of your institution's operation:*

- Do you have a strategic planning system?

- How does it work?

- Is the structure of your institution allowing effective use of resources?

- Is control centralized or decentralized?

- Are performance measures and information system controls in evidence? What are they?

- What staffing needs do you have?

- Is there a motivation problem? Is it centered in one segment of the institution or is it broadly felt?

- Is your current strategy defined? Is it based upon a strategic plan? Is it working?

- How efficient are operations? Where could improvements be made?

- What is your synopsis of the current management situation? How strong are your managers? Are there obvious weaknesses?

Λ *Now list the strengths and weaknesses of your management and planning systems:*

- Strengths

- Weaknesses

B. FINANCIAL RESOURCES (pp. 112-113)

Λ Use these questions to help you prepare your strengths and weaknesses list.

- Describe the current financial situation of your institution.

- Do you have regular financial statements prepared? (How complete are they, are they accurate, are they distributed on a timely basis to everyone having approval authority for an account?)

- What tools would be beneficial in the analysis (year to date, comparison to a year ago, trends, debt analysis, income analysis, expenditure analysis, comparison to budget)?

- Are there pro forma statements for revenue centers, such as each department/school?

Λ Now list the strengths and weaknesses of your financial resources:

- Strengths

- Weaknesses

C. MARKETING RESOURCES (pp.113-115)

Λ Use these questions to help you prepare your strengths and weaknesses list for the marketing portion of your institution's operation:

- Does your institution have established written marketing policies?

- Have you established a written marketing plan outlining what you will and will not do?

- Have you identified your potential students in the written marketing plan?

- Have you identified your current and potential funding sponsors (beyond tuition)?

- What are your competitors' services and products, level of demand, and relative market positions?

- What is the structure of tuition and fees charged? How competitive is it?

- What promotional activities (advertising, recruitment strategy) are being used by the institution? Are there written goals? Is there an advertising budget?

- What is your synopsis of the current marketing situation? How well does the marketing compare to the competition?

Λ *Now list the strengths and weaknesses of your marketing resources:*

- Strengths

- Weaknesses

D. OPERATIONS OR SERVICES RESOURCES (pp. 116-117)

Λ *Use these questions to help you prepare your strengths and weaknesses list for the operations or services portion of the institution:*

- What are your operations capacities? (How many students can your institution accommodate. What is an acceptable rate of use?)

- What is the age and condition of your facilities?

- What is the age and serviceability of existing equipment (including computers)?

DEVELOPMENT OF ASSUMPTIONS (pp.117-118)

Λ *Based on your responses to this point, list the major assumptions on which you can base your strategic plan.*

1. _____

2. _____

3. _____

4. _____

5. _____

ESTABLISHING OBJECTIVES AND KEY RESULT AREAS (pp. 119-147)

For this exercise we will use the following terms as defined in the book *Strategic Planning for Private Higher Education*: "'Key Result Areas' are an institution's general topic of action in its strategic plan; within each Key Result Area, there are 'objectives'—the specific areas of action—and 'strategies'—the detailed activities that implement those areas of action" (p. 120).

As further explanation, the book states:

Objectives can be set at upper institutional levels in Key Result Areas such as growth, finances, physical resources, staff development, and attitudes. They are also needed in subunits, departments, or divisions of an institution. Most important, all institutional objectives must be consistent and linked to the purpose/mission statement(s). Thus, a department's objectives should lead to accomplishing the overall institution's goals, which should correspond to the purpose/mission of the college/university (p. 123).

Development of Organizational Objectives

Page 120 states: "Kotler and Murphy (1990) advocate a hierarchical approach in setting overall goals which then progresses throughout various levels with increasingly specific but congruent objectives. The implication here is that strategic overall direction is driven by the mission as interpreted by senior leadership of the institution, but much latitude is given for input at lower levels."

Organizational objectives still need to be finalized. The exercises below are to assist you in developing objectives for your unit, which will, in turn, be beneficial in the finalization of overall organizational objectives. The ultimate responsibility for formalizing organizational objectives rests with the President and the Board of Regents. By completing the exercise below you will be providing valuable information that will help the President and Board in reaching the best and most informed decisions.

Λ *Now write your objectives. Use the information in your answers above to write statements of your objectives for each Key Result Area.*

KEY RESULT AREA NO. 1: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 2: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 3: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 4: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 5: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 6: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

B. TESTING OBJECTIVES

Λ *Now test each statement made above using the following criteria:*

➤ Is each statement relevant to the purpose/mission of your institution?

1. _____
2. _____
3. _____

➤ Is each statement practical?

1. _____
2. _____
3. _____

➤ Does each statement provide a challenge?

1. _____
2. _____
3. _____

➤ Is each stated in objectively measurable terms?

1. _____
2. _____
3. _____

➤ Do you have a specific date for completion?

1. _____
2. _____
3. _____

➤ Does each statement contribute to a balance of activities in line with the institution's strengths and weaknesses?

1. _____
2. _____
3. _____

Λ *Now test the institution's objective/goal-setting process:*

- Is there a clear process of setting goals and objectives?

- What are your institution's goals and objectives for the current planning year?

- Is there clear evidence that goals and objectives are written at the institutional level and at the school/college/department level?

- Does your institution's goals and objectives have a clear relationship to vision/mission/ purpose?

DEVELOPING STRATEGY AND ACTION PLANS (pp. 149-176)

It would be to your advantage to read, at a minimum, pages 150-159 and the section entitled "Action (or Operational) Plans" on pages 169-175 before completing the following Strategy Development Worksheet and Action Plan.

STRATEGY DEVELOPMENT WORKSHEETS (pp. 177-180)

Λ *Answer these questions first:*

1. What are your institution's distinctive competencies? What do you do well that makes you different from similar institutions at other higher education institutions?

2. What market segments should you select to match your institution's skills and resources and constituents' needs in those segments?

3. Do you have the skills/resources to pursue several segments or should you concentrate on one segment? Are the financial sponsorship and funding opportunities of that segment large enough to sustain the institution and to allow for growth?

Λ *Now, develop your positioning statement:*

1. Distinctive Competencies

2. Client Segments Sought

3. Services Offered

4. Promotion Orientation

5. Financial Support Levels

6. Growth Orientation

Λ Next, develop your overall strategy (Growth, Stability, Retrenchment) for each major program (p. 179):

PROGRAM: _____

➤ GROWTH (Add or expand spectrum of programs.)

- Growth: Alternative Strategy 1

Pros _____

Cons _____

- Growth: Alternative Strategy 2

Pros _____

Cons _____

➤ STABILITY (keep same programs while improving on effectiveness and efficiency)

- Stability: Alternative Strategy 1

Pros _____

Cons _____

- Stability: Alternative Strategy 2

Pros _____

Cons _____

➤ RETRENCHMENT (major reduction or elimination in existing programs)

- Retrenchment: Alternative Strategy 1

Pros _____

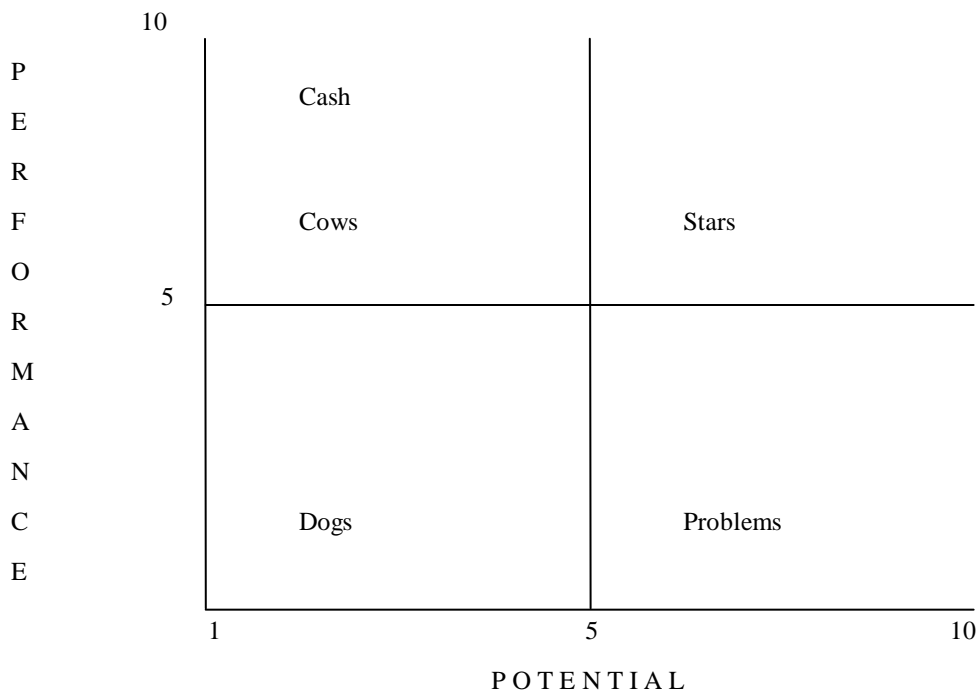
Cons _____

- Retrenchment: Alternative Strategy 2

Pros _____

Cons _____

To assist in determining growth stability and retrenchment, use the performance potential matrix.*



* Migliore, R. Henry. (2000). *Strategic Planning and Management for the New Millennium*, p. 64-68.

YOUR INSTITUTION'S OVERALL GENERAL STRATEGIES

➤ **GROWTH STRATEGIES:**

➤ **STABILITY STRATEGIES:**

➤ **RETRENCHMENT STRATEGIES:**

ACTION PLAN (Format option from page 181)

Please duplicate this sheet as necessary for each of your objectives.

OBJECTIVE: _____

STRATEGIES:

A. _____

B. _____

C. _____

D. _____

E. _____

ACTION PLAN: _____

Person Responsible: _____

Resources Required: _____

Date Started: _____

Date Completed: _____

Strategic Planning Worksheets For Units Within the Institution

The following worksheets are based on the book *Strategic Planning for Private Higher Education* (The Haworth Press, 1997). Page numbers in parentheses refer to this book. By completing the tasks that follow, you will help your institution and/or your specific unit, develop a strategic plan.

YOUR MISSION STATEMENT (pp. 51-69)

Λ Here is a sample Statement of Purpose and Mission Statement from Northeastern State University:

STATEMENT OF PURPOSE

To implement Northeastern State University's mission of excellence in teaching, research, and service; the following purposes provide direction for planning, administration, and programming:

1. Provide flexible, comprehensive, and relevant undergraduate and graduate programs;
2. Promote and support comprehensive academic programs that stimulate students to seek knowledge, think analytically, and communicate their thoughts effectively;
3. Maintain and support a university community committed to providing educational programs that enhance the quality and vitality of student experiences through effective teaching, research, continuing education, and public service;
4. Provide multifaceted opportunities for personal and social development through effective student support services;
5. Provide cultural and extracurricular activities that foster informed judgment, aesthetic sensibility, and a sensitivity for ethnic and cultural diversity and a sense of historical continuity;
6. Offer programs which prepare students for leadership and decision-making roles in a technologically and globally-oriented society, and which enable students to develop an awareness and appreciation for local, state, national, and international perspectives.

MISSION STATEMENT

Northeastern State University is a comprehensive regional university governed by the Board of Regent of Oklahoma Colleges within a state system coordinated by the Oklahoma State Regents for Higher Education. Its mission is to provide undergraduate and graduate education leading to bachelor's degrees, master's degrees in selected areas, and a doctoral degree in Optometry. In fulfilling this mission the University commits itself to excellence in instruction, to appropriate basic and applied research, to educational outreach and service, and to cultural activities that enhance the quality of life in the region and state. The University's contemporary mission reflects the high aspirations and commitment to classical education made in 1846 by the founders of the original Cherokee seminaries.

For example, here is the Mission Statement for the College of Business, University of Arkansas. Every college's Mission Statement at the University of Arkansas must support the overall University mission statement.

**COLLEGE OF BUSINESS ADMINISTRATION
UNIVERSITY OF ARKANSAS**

Our mission is to cultivate an environment of educational excellence in the business and organizational disciplines and to foster lifelong learning and innovation.

We will achieve our mission by continuous improvement in:

- Generating and disseminating knowledge that benefits individuals, organizations, and society
- Providing educational programs and experiences that prepare individuals to make sustained contributions to organizations and society in a global, diverse, and dynamic environment
- Developing an individual's:
 - interdisciplinary problem-solving skills,
 - interpersonal and communication skills,
 - ability to adapt to changing technology,
 - spirit of entrepreneurial innovation, and
 - ethical and professional values
- Exploring the theory and practice of organizations and businesses, and expanding the knowledge upon which they operate.
- Fostering a spirit of partnership with all our constituents based upon mutual respect, trust, and benefit.
- Serving the public's needs in harmony with the Land-Grant Mission of the University of Arkansas.

EXTERNAL ENVIRONMENT ANALYSIS WORKSHEETS (pp. 106-109)

Λ *Look for trends—what is going on now and how this relates to past trends that have influenced your institution's and your unit's performance. List key opportunities and threats for each of the following environmental sectors:*

A. GOVERNMENT

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

B. ECONOMY

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

C. TECHNOLOGY

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

D. SOCIAL TRENDS

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

E. STUDENTS

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

F. FUNDING SOURCES/SPONSORSHIP

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

G. COMPETING EDUCATIONAL INSTITUTIONS

Opportunities

1. _____
2. _____
3. _____

Threats

1. _____
2. _____
3. _____

Λ *Next, evaluate your external analysis:*

- Have you listed several international/national trends that affect the institution and/or your unit?

- Have you listed several local trends that affect the institution and/or your unit?

- Have you identified trends unique to your institution and/or your unit?

- Have you listed several of your most important competitors? What is distinctive about them?

- Which competitors are growing, becoming stronger?

- Which competitors are declining?

- What are the successful ones doing to cause their growth/vibrancy?

INTERNAL ANALYSIS WORKSHEETS

A. MANAGEMENT AND PLANNING SYSTEMS (pp. 109-112)

Λ Use these questions to help you prepare your strengths and weaknesses list for the management and planning systems portion of your institution's and/or your unit's operation:

- Do you have a strategic planning system?

- How does it work?

- Is the structure of your institution and/or your unit allowing effective use of resources?

- Is control centralized or decentralized?

- Are performance measures and information system controls in evidence? What are they?

- What staffing needs do you have?

- Is there a motivation problem? Is it centered in one segment of the institution or is it broadly felt?

- Is your current strategy defined? Is it based upon a strategic plan? Is it working?

- How efficient are operations? Where could improvements be made?

- What is your synopsis of the current management situation? How strong are your managers? Are there obvious weaknesses?

Λ *Now list the strengths and weaknesses of your management and planning systems:*

- Strengths

- Weaknesses

B. FINANCIAL RESOURCES (pp. 112-113)

Λ Use these questions to help you prepare your strengths and weaknesses list.

- Describe the current financial situation of your institution and your unit.

- Do you have regular financial statements prepared? (How complete are they? Are they accurate? Are they distributed on a timely basis to everyone having approval authority for an account?)

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- Are there pro forma statements for revenue centers, such as each department/school?

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- Strengths

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C. MARKETING RESOURCES (pp.113-115)

Λ Use these questions to help you prepare your strengths and weaknesses list for the marketing portion of your institution's and your unit's operation:

- Does your institution have established written marketing policies?

- Have you established a written marketing plan outlining what you will and will not do?

- Have you identified your potential students in the written marketing plan?

- Have you identified your current and potential funding sponsors (beyond tuition)?

- What are your competitors' services and products, level of demand, and relative market positions?

- What is the structure of tuition and fees charged? How competitive is it?

- What promotional activities (advertising, recruitment strategy) are being used by the institution and/or your unit? Are there written goals? Is there an advertising budget?

- What is your synopsis of the current marketing situation? How well does the marketing compare to the competition?

Λ *Now list the strengths and weaknesses of your marketing resources:*

- Strengths

- Weaknesses

D. OPERATIONS OR SERVICES RESOURCES (pp. 116-117)

Λ *Use these questions to help you prepare your strengths and weaknesses list for the operations or services portion of the institution and your unit:*

- What are your operations capacities? (How many students can your unit accommodate? What is an acceptable rate of use?)

- What is the age and condition of your facilities?

- What is the age and serviceability of existing equipment (including computers)?

DEVELOPMENT OF ASSUMPTIONS (pp. 117-118)

Λ *Based on your responses to this point, list the major assumptions on which you can base your strategic plan.*

1. _____

2. _____

3. _____

4. _____

5. _____

ESTABLISHING OBJECTIVES AND KEY RESULT AREAS (pp. 119-147)

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Development of Organizational Objectives

Page 120 states: "Kotler and Murphy (1990) advocate a hierarchical approach in setting overall goals which then progresses throughout various levels with increasingly specific but congruent objectives. The implication here is that strategic overall direction is driven by the mission as interpreted by senior leadership of the institution, but much latitude is given for input at lower levels."

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Λ *Now write your objectives. Use the information in your answers above to write statements of your objectives for each Key Result Area.*

KEY RESULT AREA NO. 1: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 2: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 3: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 4: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 5: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

KEY RESULT AREA NO. 6: _____

Objective 1: _____

Objective 2: _____

Objective 3: _____

B. TESTING OBJECTIVES

Λ Now test each statement made above using the following criteria:

➤ Is each statement relevant to the purpose/mission of your institution and your unit?

1. _____
2. _____
3. _____

➤ Is each statement practical?

1. _____
2. _____
3. _____

➤ Does each statement provide a challenge?

1. _____
2. _____
3. _____

➤ Is each stated in objectively measurable terms?

1. _____
2. _____
3. _____

➤ Do you have a specific date for completion?

1. _____
2. _____
3. _____

➤ Does each statement contribute to a balance of activities in line with the institution's and/or your unit's strengths and weaknesses?

1. _____
2. _____
3. _____

Λ *Now test the institution's and/or your unit's objective/goal-setting process:*

- Is there a clear process of setting goals and objectives?

- What are your unit's goals and objectives for the current planning year?

- Is there clear evidence that goals and objectives are written at the institutional level and at the school/college/department level?

- Does your institution's and/or your unit's goals and objectives have a clear relationship to vision/mission/purpose?

DEVELOPING STRATEGY AND ACTION PLANS (pp. 149-176)

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2. What market segments should you select to match your unit's and/or the institution's skills and resources and constituents' needs in those segments?

3. Do you have the skills/resources to pursue several segments or should you concentrate on one segment? Are the financial sponsorship and funding opportunities of that segment large enough to sustain the institution and/or your unit and to allow for growth?

Λ *Now, develop your positioning statement:*

1. Distinctive Competencies

2. Client Segments Sought

3. Services Offered

4. Promotion Orientation

5. Financial Support Levels

6. Growth Orientation

Λ Next, develop your overall strategy (Growth, Stability, Retrenchment) for your unit (p. 179):

UNIT (PROGRAM): _____

➤ GROWTH (Add or expand spectrum of programs.)

- Growth: Alternative Strategy 1

Pros _____

Cons _____

- Growth: Alternative Strategy 2

Pros _____

Cons _____

➤ STABILITY (Keep the same programs while improving on effectiveness and efficiency.)

- Stability: Alternative Strategy 1

Pros _____

Cons _____

- Stability: Alternative Strategy 2

Pros _____

Cons _____

➤ RETRENCHMENT (major reduction or elimination in existing programs)

- Retrenchment: Alternative Strategy 1

Pros _____

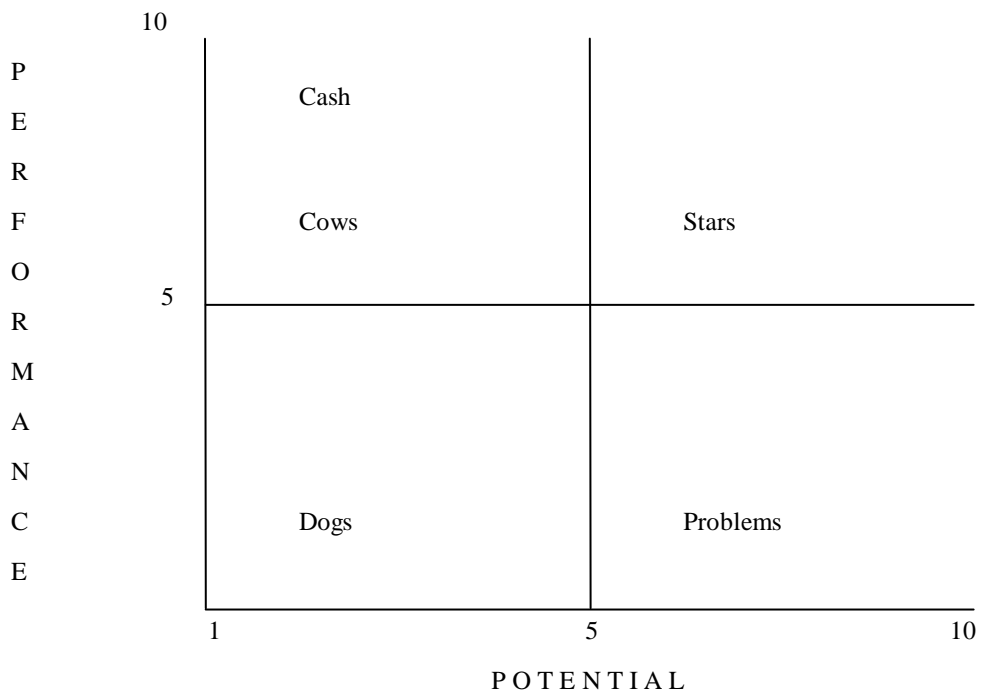
Cons _____

- Retrenchment: Alternative Strategy 2

Pros _____

Cons _____

To assist in determining growth stability and retrenchment, use the performance potential matrix.*



* Migliore, R. Henry. (2000). *Strategic Planning and Management for the New Millennium*, p. 64-68.

YOUR INSTITUTION'S OVERALL GENERAL STRATEGIES

➤ GROWTH STRATEGIES:

➤ STABILITY STRATEGIES:

➤ RETRENCHMENT STRATEGIES:

ACTION PLAN (Format option from page 181)

Please duplicate this sheet as necessary for each of your objectives.

OBJECTIVE: _____

STRATEGIES:

A. _____

B. _____

C. _____

D. _____

E. _____

ACTION PLAN: _____

Person Responsible: _____

Resources Required: _____

Date Started: _____

Date Completed: _____