

KEY ELEMENTS OF THE STRATEGIC PLAN

The academic, administrative and other unit plans will be developed using a consistent format and outline which is provided in the following diagram. The time period for the plan is 2005 to 2010. An explanation for each of the components of the plan is included in this document as well.

1. **Executive Summary** – The executive summary of the plan will provide the reader with a summary level understanding of the issues facing the organization, the organization’s future direction and vision, how the organization will achieve its vision, and the resources required to implement the plan.
2. **Vision Statement** – The vision statement is a one-sentence statement that defines what the academic, administrative or other unit will look like when it is successful.
3. **Environmental Assessment and Strategic Implications** – The items to be incorporated in the final strategic plan report include the strategic issues and a summary of the strengths and weaknesses, opportunities and threats.
4. **Goal Statements with Measures/Targets for Each Goal** – Indicate 5-year and first year targets.
5. **Strategic Initiatives to Accomplish the Goals** – Indicate tactics for the next year and tactics to be completed from years two through five.
6. **Resource Plan: Space, Capital and Non-Capital Items, Infrastructure, Human Resources, Other**
7. **Summary Statement of How the Plan Supports the University Vision** - The statement can be brief but needs to be tied back to specific items in the summary vision statement and the accompanying vision characteristics.

Represents the basis for the development of an annual operating plan and budget development process.

EXECUTIVE SUMMARY

The executive summary of the plan will provide the reader with a summary level understanding of the issues facing the organization, the organization’s future direction and vision, how the organization will achieve its vision, and the resources required to implement the plan. The executive summary should be no more than 2 pages long. Typically, the executive summary is written once the plan has been completed.

VISION STATEMENT

The vision statement is a one-sentence statement that defines what the academic, administrative or other unit will look like when it is successful. The vision is the stated end-point that is at least 10 years away, is attainable, and is an actionable stretch goal. A bulleted list can be included that further defines the characteristics of the vision statement.

ENVIRONMENTAL ASSESSMENT

This component of the report will include the summary level information from Part One of the environmental assessment report. The items to be incorporated in the final strategic plan report include the strategic issues and a summary of the strengths and weaknesses, opportunities and threats. Additionally, key data points or trends of information can be included as well as important benchmark information. The remainder of the assessment information can be included as an appendix.

GOAL STATEMENTS

A goal statement is a comprehensive statement that defines the desired outcomes after a 5-year period required to achieve the vision. The statement explains the end result or specific behavior desired for the future. It is the “why” of the strategic plan activities. A goal should always have three components: a description of the result or change, a description of the entity for whom the result or change will apply, and a time specific target-driven measure. A 5-year target and annual targets need to be defined for each goal.

Six to ten goal statements should be developed to address the strategic issues identified by your academic, administrative or other unit.

Goal Statement 1:	
Measure (s)	Year 1 Target-FY 2006: 2010 Target:

STRATEGIC INITIATIVES

Strategic initiatives are an integrated set of choices, which positions the academic, administrative and other units to create sustainable advantage relative to other premier universities. A strategic initiative statement describes the scope of work that needs to be completed to achieve the goals and vision. The statement has two components: the description of the scope of work and a timeframe. The initiative statement should guide the academic, administrative or other unit over the time period of the plan and should drive annual activities. For each initiative, high-level implementation tactics need to be defined and prioritized. Initiatives should not only include new program development, but should identify programs that should be reprogrammed, redirected, or eliminated. Ten to twenty initiatives should be developed.

The following framework should be used for documentation. Prioritization of initiative implementation will be required to document annual operating plans for FY 2005, FY 2006 and a summary for FY 2007-2010.

Strategic Initiative 1:

Annual Operating Plan (Current Year – FY 2005)	
Tactics	Resources
<ul style="list-style-type: none"> • • • 	Summary level of dollar amounts

Annual Operating Plan (Year 1 – FY 2006)	
Tactics	Resources
<ul style="list-style-type: none"> • • • 	Summary level of dollar amounts

Annual Operating Plan (Year 2 through 5 – FY 2007 – FY 2010)	
Tactics	Resources
<ul style="list-style-type: none"> • • • 	Summary level of dollar amounts

RESOURCE NEEDS TEMPLATE

See attached.

SUMMARY STATEMENT OF HOW THE PLAN SUPPORTS THE UNIVERSITY VISION

Each plan should include a brief statement documenting how the plan supports the University Vision. The statement can be brief but needs to be tied back to specific items in the summary vision statement and the accompanying vision characteristics.