



## Strategic Planning Toolkit

### OVERVIEW

The Strategic Planning Toolkit provides a guide and resources that adapt many of the concepts and building blocks of program review to allow constituents to strategically analyze and address the future. This approach to the planning process is intended to be customized to suit the individual needs and culture of the unit. Some may find it beneficial to complete this planning process from start-to-finish while others may wish to incorporate individual components of the toolkit to complement their existing efforts.

While each engagement and design can be uniquely customized to serve the specific needs of the unit, the purpose of the Strategic Planning Toolkit is threefold:

- To define the strategic planning process in various forms and sizes
- To provide exercises, models and templates for strategic analyses
- To provide options and serve as a reference to constituents who are considering strategic activities in their areas

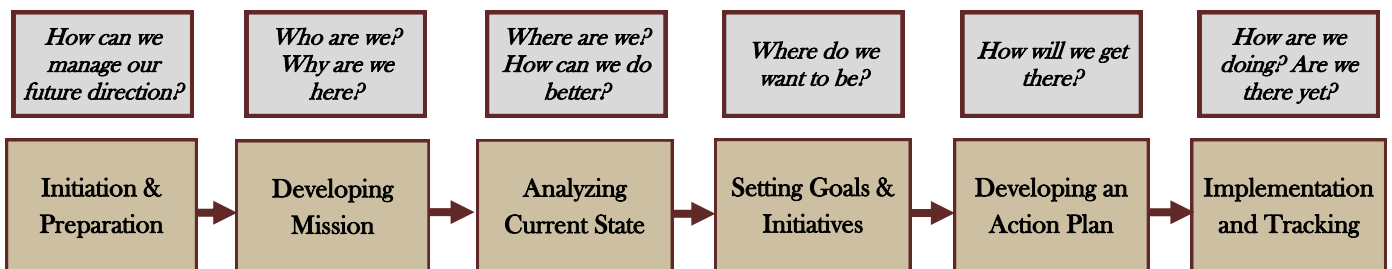
### PLANNING AND ASSESSMENT



### IR&P STRATEGIC PLANNING PROCESS

Electronic folders with tips, exercises and sample facilitated programs to assist your team with its strategic planning efforts are located in the Strategic Planning Toolkit on the IR&P website.

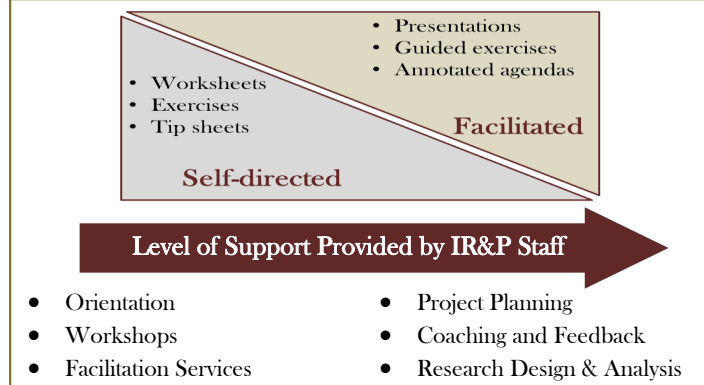
[https://www.bc.edu/offices/irpa/strategic\\_services/strategic\\_planning\\_toolkit.html](https://www.bc.edu/offices/irpa/strategic_services/strategic_planning_toolkit.html)



### KEY ANALYTIC TOOLS

- Conducting a Planning Audit
- Setting Scope and Tailoring the Planning Process
- Developing Mission Exercises
- Checking Mission Alignment
- Strategic Visioning
- Stakeholder Identification and Analysis
- External Environment Scan and Peer Analysis
- SWOT Analysis
- Setting Goals and Initiatives
- Prioritizing Initiatives
- Developing Action Plans
- Implementation of Strategies

### IR&P SUPPORT

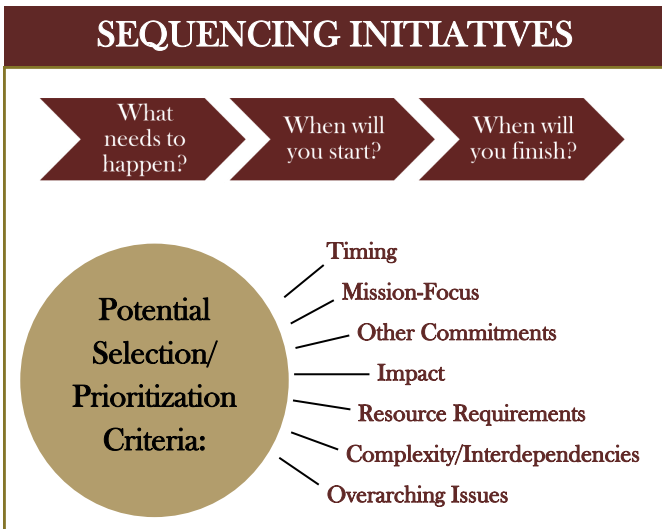


MISSION	VS	VISION
Enduring Purpose		Picture of Desired State
Who Are We?		Where Are We Headed?
Abstract		Concrete
Guiding Star		Direction
Aspiration		Stretch but Achievable
Timeless		1-5 Years
Informs Vision		Gives Life to Mission

STAKEHOLDER ANALYSIS	
<ul style="list-style-type: none"> <li>Students and Parents</li> <li>Department Staff</li> <li>Faculty/Academic Community</li> <li>Staff/Administrators</li> <li>University Leadership</li> <li>Other Departments</li> </ul>	<ul style="list-style-type: none"> <li>Central Administration</li> <li>Cross Divisional Peers</li> <li>Collaborators/Divisional Peers</li> <li>Board of Trustees</li> <li>Prospective Students</li> <li>Alumni</li> </ul>
<ul style="list-style-type: none"> <li>Federal, State, and Local Government</li> <li>Regulators</li> <li>External Funding Sources</li> <li>Contractors &amp; Consultants</li> <li>Vendors &amp; Suppliers</li> </ul>	<ul style="list-style-type: none"> <li>Professional Groups</li> <li>Trades Associations</li> <li>Collaborators, Consortia, and Alliances</li> <li>Other Universities</li> <li>Local Community Groups</li> </ul>

SWOT MATRIX	
<b>Strengths</b> <ul style="list-style-type: none"> <li>What do we do exceptionally well?</li> <li>What knowledge, skills, or resources do we have?</li> <li>What do you feel proud of?</li> <li>What is our "rock"?</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>What could we do better?</li> <li>What are we criticized for or received complaints about?</li> <li>What are our vulnerabilities?</li> <li>What frustrates you?</li> </ul>
<b>Opportunities</b> <ul style="list-style-type: none"> <li>What are the emerging trends and events (i.e. technology, government policy, social patterns, population profiles, lifestyle changes) that we can capitalize on?</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>What external roadblocks block our progress?</li> <li>Is there any significant change coming in our customer base?</li> <li>What are other universities doing that may impact us?</li> </ul>

EXTERNAL SOURCES
<b>Professional Associations/Trade Publications and Magazines</b> <ul style="list-style-type: none"> <li>What are the current trends/best practices in the unit's field or national service area?</li> <li>What has the unit done to accommodate changes in its environment and continuously improve?</li> </ul>
<b>Industry Standards and Benchmark Information</b> <ul style="list-style-type: none"> <li>What are sources of benchmark data and industry standards?</li> <li>How do the unit's services compare to these standards?</li> <li>If standards do not exist, how can they be developed &amp; compared?</li> </ul>
<b>Peer Institutions</b> <ul style="list-style-type: none"> <li>Consider key criteria to identify peer group.</li> <li>Develop group of 10-15 peers, including aspirational peers, competitors, and peers with similar characteristics, e.g., size, location, etc.</li> </ul>
<b>Regulatory Environment</b> <ul style="list-style-type: none"> <li>What laws, regulations or other requirements external to the University impact the work of the unit?</li> <li>How does the unit ensure it remains current and compliant with these legal requirements?</li> </ul>



CONTACT APR	
<b>Office:</b> St Clement's Hall 300 617-552-3111	Michael Pimental, Executive Director · 617-552-4958 · <a href="mailto:michael.pimental@bc.edu">michael.pimental@bc.edu</a> Denice Koljonen, Associate Director · 617-552-3739 · <a href="mailto:denice.koljonen@bc.edu">denice.koljonen@bc.edu</a>