WACUBO

Business Management Institute

Track 3: Strategic Planning
August 4-5, 2026

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What We Will Cover

Strategic Planning I: Strategic Planning Foundations (Tues. morning)
- Framework, Case Studies and Report Out Process
- SOAR analysis

Strategic Planning II (Tues. afternoon)
- Core Values, Vision, Mission

Strategic Planning III (Wed. morning)
- Strategic Sweet Spot, Strategic Objectives

Strategic Planning IV (Wed. morning)
- Initiatives, Measures

Strategic Planning V (Wed. afternoon)
- Strategic Initiative Resource Allocations
- Group Presentations
- Peer Wisdom and Takeaways

By the End of Day 2, Your Team Will Present a Balanced Scorecard Strategy Map

✓ Core Values
✓ Mission Statement
✓ Strategic Objectives
✓ Strategic Initiatives
✓ Measures of Success

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Agenda Session I: Strategic Planning Foundations

Tuesday, 10:30 AM-12:00 PM

Time	Topic
15 mins	Welcome!
15 mins	Introduce Case Studies - *What is Your University Name and Mascot?*
40 mins	Strategic Planning Fundamentals
15 mins	Group Work - SOAR
5 mins	Close

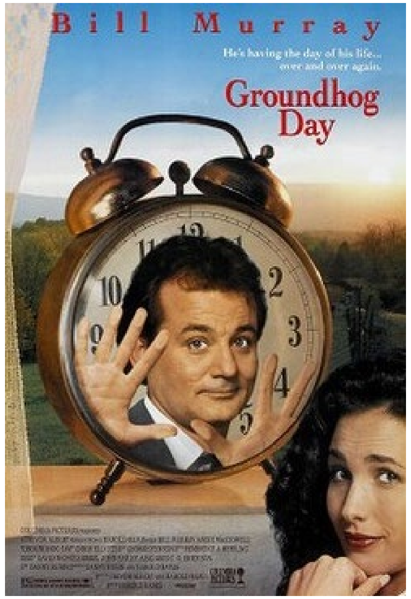
At your table: Case Study, SOAR Template, Strategy Map template

Report Out Deliverables on Wednesday afternoon: (10 mins each, including Q&A)
Core Values, Vision, Mission (Session II)
3 Strategic Objectives, 1 Strategic Initiative, 1 Measure of Success per planning category (Session III & IV)

Report out (Wed afternoon): Your team can choose to report out in whatever way works best: powerpoint, visuals and description of which tools you used (we will review templates and tools in class)

Which movie BEST describes where you are on your strategic planning journey?

"Wait...how did I end up leading this?"



“Been there, done that.”

"I survived strategic planning...I think."

“Where do we even begin?"

Discussion

5 mins

What causes strategic plans to fail?

- Why do some plans sit on a shelf?
- What makes a strategic plan useful?
- What have you experienced at your institution?

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Strategic Planning Activity – Case Studies

Your team has been appointed as the Senior Leadership team of a university unit or department facing a unique set of opportunities and challenges.

Your Case Study fact sheet reflects a common higher education environment, such as Academic Dept, Student Services, Alumni Affairs, Auxiliary Services, or Administrative Operations.

Like many institutions today, your university does not have a current institutional strategic plan to guide decision-making. While broad institutional goals and priorities exist, there is no clear roadmap for the future.

You will complete a Strategy Map to communicate your strategic plan and deliver a 7-minute presentation

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Your University Name:

University Mascot:

University Unit:

Team Members:

Unit's Mission

Why do you exist, whom do you serve, how do you do it?

	Strategic Objectives: List 3 Objectives and Draw Arrows to Indicate Cause and Effect			How success will be measured	Strategic Initiatives: List 1-2 Initiatives to execute on our Objectives in the next three years
Financial/ Stakeholder	1.	2.	3.	1. 2.	1. 2.
Customer	1.	2.	3.	1. 2.	1. 2.
Internal Processes	1.	2.	3.	1. 2.	1. 2.
People & Culture	1.	2.	3.	1. 2.	1. 2.

Core Values

What values must be upheld for your team to deliver on the university's mission?

Team Formation (5 Teams)

1. Academic Dept
2. Auxiliary Unit
3. Administrative Division
4. Student Services
5. Alumni Affairs

Your Task

- Review your Case Study Fact Sheet
- Determine your University Name and Mascot!

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Shared Definitions

Strategy vs Strategic Planning

Concept	Definition	Key Question	Simple Example
Goal	The specific **outcome** you want to achieve	What are we trying to accomplish?	*"Open a successful coffee shop"*
Strategy	The **unique approach** and choices you make to achieve the goal	How we will win, and what will we choose ***not*** to do?	*"Differentiate by serving premium local coffee in a community-focused space—not by competing on price.*
Strategic Planning	The **process** of turning the **strategy into action** through objectives, initiatives, measures, timelines, and resources	How will we execute the strategy?	*Secure a location, hire staff, purchase equipment, market the grand opening, and track sales and customer satisfaction."*

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Higher Education Example

Mission Why We Exist	Strategy How We Create Unique Value	Strategic Planning The Process of Building the Objectives, Initiatives, Measures, Timeliness
Educate students and advance knowledge	*Differentiate through proactive, data-informed advising and early intervention*	*Develop objectives, launch advising initiatives, assign resources, and measure retention and graduation*

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The ***Balanced Scorecard*** is a framework that translates strategy into execution.

The Balanced Scorecard: Origins & Purpose

Created by Kaplan & Norton in the 1990s.

Originally designed for the private sector, adapted for nonprofits and higher education.

Key insight: financial measures alone are insufficient — organizations need a balanced view.

"The Balanced Scorecard translates an organization's mission and strategy into a comprehensive set of **performance measures** that provides the **framework** for a strategic **measurement** and **management system**."

For higher education, the Financial perspective is often replaced with Mission Impact.

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Strategic Planning Story: “A Balanced Approach”

SHARED PURPOSE (MISSION AND VISION)

…And build strong **relationships** both **internally and externally** so that we can achieve our mission and vision, and **articulate our impact**	**Financial/Stakeholder**	**Outward Focus**
… We focus our efforts on the **value-add activities identified by our stakeholders**	**Customer Expectations**	
…That enables us to **operate equitably and productively**, and focus on the most important priority areas...	**Internal Processes**	**Inward Focus**
A culture built strong team skills, fostering a **positive work climate**, providing **professional development, providing the tools** to succeed…	**People & Culture**	

CORE VALUES

The Balanced Scorecard Basics

The 4 Perspectives	Strategic Objectives	Strategy Map
Measures of Success	Strategic Initiatives	Cascading

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1) What are Balanced Scorecard Perspectives

"How do we ensure we have the resources to succeed?"

Or

"How do we responsibly manage the resources entrusted to us?"

Financial/Stakeholder

("community partnerships and impact")

- Financial performance
- Effective resource use

"How do we create value for our stakeholders?"

Customer

- Customer-identified value
- Satisfaction

"What must we excel at to succeed?"

Internal Processes

- Efficiency
- Quality

"How do we build our people capacity to succeed?"

Learning and Growth (or "People and Culture")

("innovation and growth")

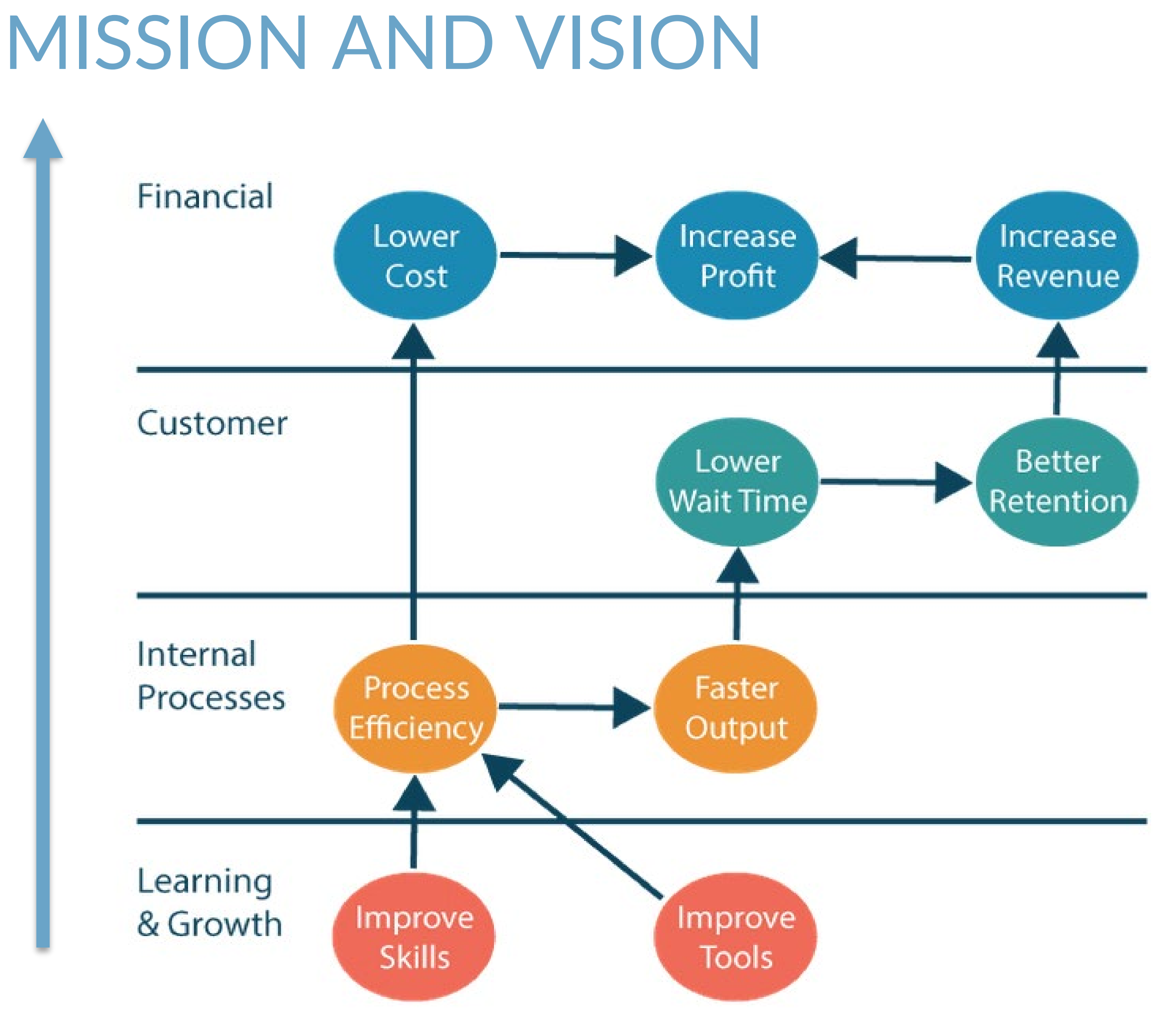
- Staff Engagement
- Infrastructure & Technology
- Culture

2) What are Strategic Objectives?

- Strategic Objectives are the "**what**," needs to be done in order to achieve success in fulfilling your **Mission**.

- They break down the abstract concepts like mission and vision into **action-language**

- They are high level, **measurable**, and **stable goals** that don't change from year to year

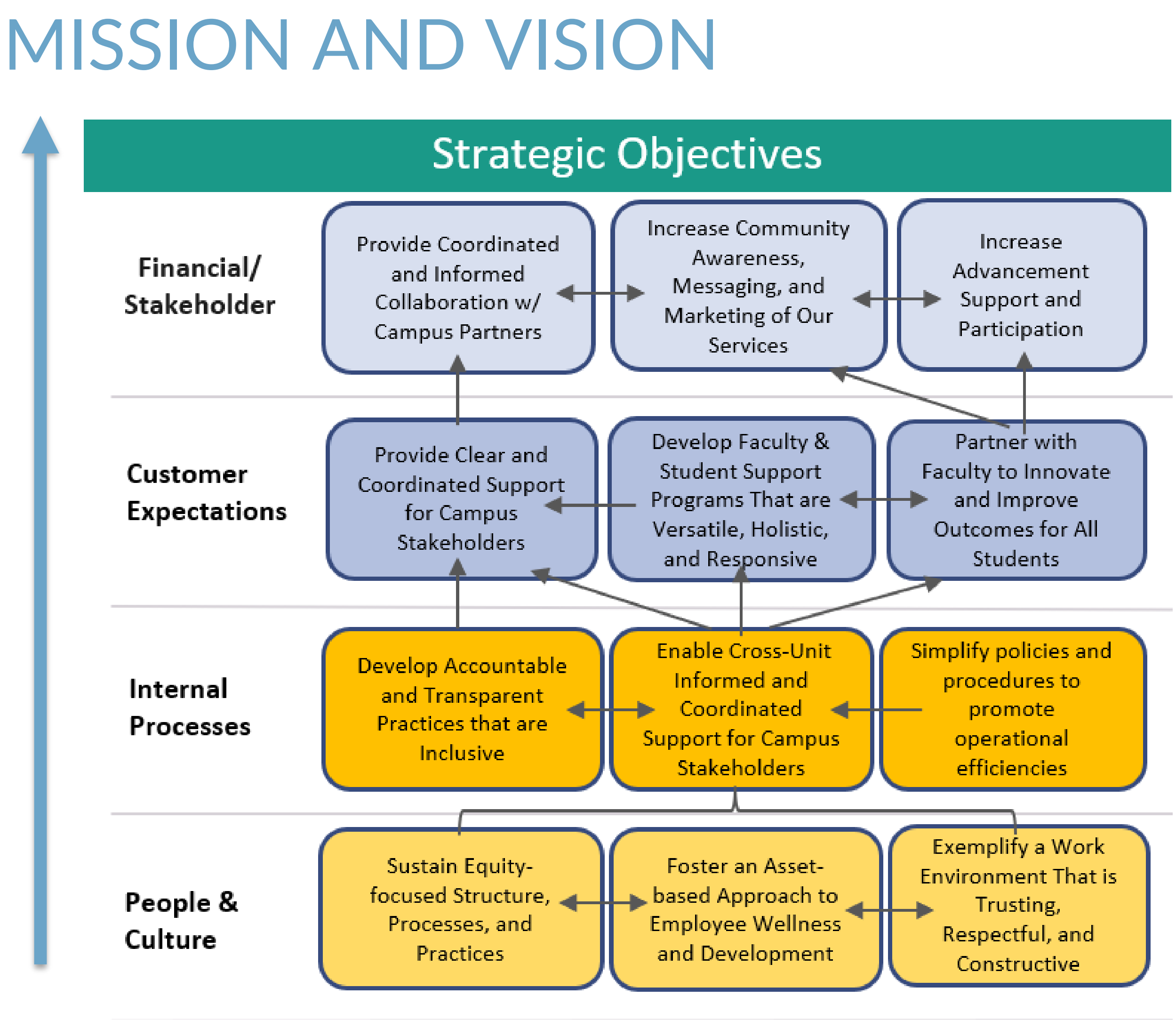


3) What is a Strategy Map?

- A strategy map is a **simple graphic** to reflect the **cause and effect relationships** between the strategic objectives (see arrows)

- Shows alignment to the Mission (answers the question "why are we doing this?")

- Enables you to visualize and communicate how value is created



4) What are Measures of Success (also called Key Performance Indicators, KPIs)

- For each objective on the strategy map, at least one measure or Key Performance Indicator (KPI) is identified and tracked over time
- KPIs ensure accountability by indicating progress
- Include both intermediary/input (“leading”) and output (“lagging”) measures

5) What are Strategic Initiatives (or Projects)?

- Strategic Initiatives are the specific "**how**," or the steps you will take to successfully accomplish the Mission.

- They are projects (new or existing) that help the organization achieve the Strategic Objectives

- They can be **short term or long term**, are measurable, and managed like any other project (i.e., have an owner, defined scope and schedule, and measurable outcomes)

SAMPLE BALANCED SCORECARD VISUAL

Institutional Targets

URM 4-yr grad rate: 75%
First Gen 4-yr grad rate: 75%
Pell Eligible 4-yr grad rate: 75%
All Students 4-yr grad rate:75%
URM 2-yr transfer grad rate: 70%
First Gen 2-yr transfer grad rate: 70%
Pell 2-yr transfer grad rate: 70%
All Students 2-yr transfer grad rate: 70%

MISSION

We support and enhance student and faculty success through transformative, evidence-based teaching and learning practices

"What are we going to do?"

	Strategic Objectives			Intermediary KPIs	Output KPIs
Financial/ Stakeholder	Provide Coordinated and Informed Collaboration w/ Campus Partners	Increase Community Awareness, Messaging, and Marketing of Our Services	Increase Advancement Support and Participation	# joint grant submittals # of campus collaborations formed/sustained # of faculty/student speaker series # consultations provided # of campus outreach	Joint grants awarded and $$ National articles recognizing XYZ Student grades improvements Faculty assessments improvements Student participant persistence & retention
Customer Expectations	Provide Clear and Coordinated Support for Campus Stakeholders	Develop Faculty & Student Support Programs That are Versatile, Holistic, and Responsive	Partner with Faculty to Innovate and Improve Outcomes for All Students	# of student / faculty hours at XYZ # of referrals to XYZ # repeat XYZ usage by student, faculty # new programs delivered # new students and faculty participants	Faculty & Staff Satisfaction Survey scores Student Satisfaction Survey scores Systemwide UG Survey scores Systemwide Grad Survey scores
Internal Processes	Develop Accountable and Transparent Practices that are Inclusive	Enable Cross-Unit Informed and Coordinated Support for Campus Stakeholders	Simplify policies and procedures to promote operational efficiencies	# of processes streamlined & documented % time savings realized from process opt % completion of programs & services eval plans # of facilitated internal trainings	XYZ Staff@Work Survey scores (on valuable training & development, spirit of cooperation, and behavior & conduct, overall satisfaction, etc.)
People & Culture	Sustain Equity-focused Structure, Processes, and Practices	Foster an Asset-based Approach to Employee Wellness and Development	Exemplify a Work Environment That is Trusting, Respectful, and Constructive	% response rates for staff surveys % participation in training and development % participation in voluntary team activities	eNPS score on S@W Survey XYZ Climate Survey scores Turnover and Retention XYZ Diversity Dashboards goals

Strategic Initiatives

- Perform program reviews with ABC
- Identify and expand of Digital Delivery for online courses
- Develop new faculty onboarding; faculty fellows programming
- Expand services to DEF, GHI, JKL
- Rebrand XYZ
- Develop new pipeline models with …
- Initiate joint fundraising with …
- Implement annual Strategic Focus Retreat
- Review hiring and lifecycle practice
- Invest in professional & student staff training
- Include EDI into performance review
- Develop internal documentation & library
- ITS unification in platforms

VALUES

Core Values: Transformation, Belonging, Collaboration, Authenticity, Compassion

6) What is Cascading?

This Line of Sight is what makes the strategy real for every individual

- Cascading strategies focus the entire organization and create line-of-sight between the work people do and the high-level mission and goals
- As you cascade down through the organization, objectives become more operational and tactical (as do KPIs)
- This is critical step for an organization to be truly strategy-focused

The Story of Christopher Wren

Wren: "What are you doing?"

"I am cutting a piece of stone."

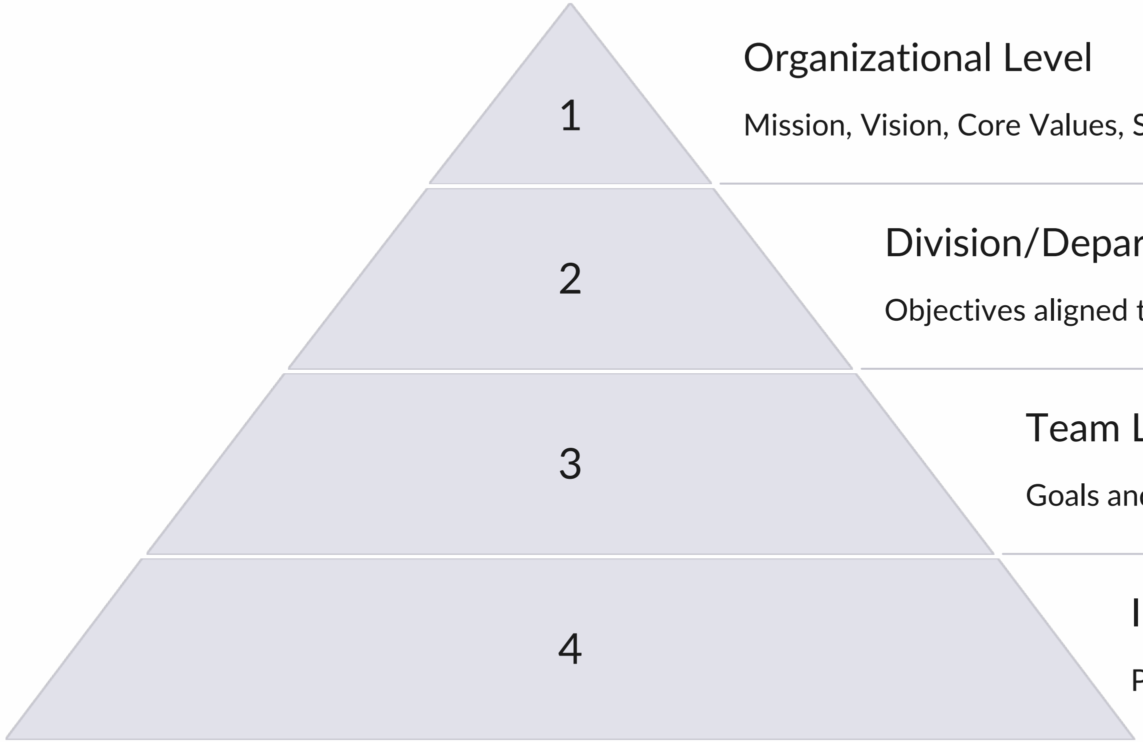
"I am earning five shillings twopence a day."

"I am helping Sir Christopher Wren build a beautiful cathedral."

“I’m Helping Put a Man On the Moon”

Cascading Strategy: Line of Sight

Cascading strategy gives every individual a **sense of purpose** — connecting daily work to the organization's highest aspirations. When people understand **why** their work matters, they become **mission-driven contributors**.



Organizational Level

Mission, Vision, Core Values, Strategic Objectives

NASA: "Land a man on the moon and return him safely to Earth."

Division/Department Level

Objectives aligned to organizational strategy

Facilities Department: "Provide the facilities and operational support that enable NASA's scientists and engineers to do their best work"

Team Level

Goals and projects supporting departmental objectives

Custodial Team: Maintain clean, safe, and mission-ready laboratories, offices, and testing facilities."

Individual Level

Personal performance goals tied to team priorities

Custodian: "I prepare the workspaces every day so engineers and scientists can focus on building the systems that will take astronauts to the moon."

Cascading is complete when every employee can answer: "How does my work contribute to our mission?" This is the line of sight.

Without cascading, strategy stays at the top and never reaches the people doing the work.

SOAR: Strengths, Opportunities, Aspirations, Results

S

- What are we the best at?
- What are we most passionate about?
- What capabilities and resources do we have that are unique to us?
- How or where do we exceed expectations?
- What do others see as our strengths?
- What advantages do we have?

O

- What trends in our environment (social, technological, policy) can we leverage?
- Are there unmet needs or gaps we are well-positioned to fill?
- Who could we collaborate with to amplify our strengths?
- How can we use innovation to reach new stakeholders or increase value?

A

- What do we care deeply about becoming?
- How do we want to be known by our stakeholders or communities?
- What would bold success look like in the next 3–5 years?
- How can we build a culture that reflects our highest ideals?

R

- What outcomes will tell us we're making progress?
- What does success look like for our aspirations?
- How will we measure impact beyond just financial results?
- What indicators would energize and motivate our team?

At Your Tables

15 mins

SOAR Activity

Looking at your Case Study

Identify:

- Top 2 Strengths
- Top 2 Opportunities
- Top 2 Aspirations
- Top 2 Results

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SOAR: Strengths, Opportunities, Aspirations, Results

S	O
A	R

Agenda Session II: Core Values, Mission & Vision

Tuesday, 1:30 – 3:00 PM

Time	Topic
5 mins	Welcome back!
35 mins	Core Values, Vision, Mission
45 mins	Group Work - Core Values, Vision, Mission Statement
5 mins	Close

Report Out Deliverables on Wednesday afternoon: (10 mins each, including Q&A)
Core Values, Vision, Mission (Session II)
3 Strategic Objectives, 1 Strategic Initiative, 1 Measure of Success per planning category (Session III & IV)

Report out (Wed afternoon): Your team can choose to report out in whatever way works best: powerpoint, visuals and description of which tools you used (we will review templates and tools in class)

Core Values

Core values are the essential, guiding principles that define how you work, what you stand for, and why you make the choices you do. They **shape culture, influence decision-making, and reflect what is non-negotiable** in fulfilling your purpose.

→ Guide our work processes and clarify who we are

→ Articulate what we stand for and guide us in decision making

→ Must be: Authentic, Enduring, Timeless, Actionable, and Inspirational

Qualities of Effective Core Values

Authentic
Reflect who you truly are, not who you wish you were.

Enduring
Stand the test of time; not trend-driven.

Actionable
Can be demonstrated through specific behaviors.

Inspirational
Motivate and energize your team.

Distinctive
Set you apart from other organizations.

As you reflect, consider:

- What principles guide your behavior, even when no one is watching?
- What beliefs do you hold that you would not compromise, even under pressure?
- What values must be upheld for your team to deliver on the university's mission?

At Your Tables

15 mins

Define Your Unit’s Values

Activity Steps:

Step 1 — Brainstorm (2 min): Each person writes 5 values that feel essential to your unit's identity.

Step 2 — Cluster (5 min): Group similar values together.

Step 3 — Prioritize (5 min): Narrow to your Top 3–5 values.

Step 4— Write (3 min): Add these to your Strategy Map

Mission & Vision

Mission & Vision Statements

Mission Statement

A **written declaration** of an organization's core purpose and focus — answering **why** you exist.

- Why do we exist?
- What do we do?
- Who do we do it for?

Describes the *organization*.

Vision Statement

An **aspirational** description of what the future we aspire to create if we are successful.

- Where are we going?
- What do we aspire to be?

Describes the *future*.

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Example Mission Statements

Google: “To organize the world's information and make it universally accessible and useful.”

Smithsonian: "To increase the diffusion of knowledge."

The Nature Conservancy: "To conserve the lands and waters on which all life depends.”

What do these have in common? What makes them memorable?

Example Vision Statements

Habitat for Humanity: “A world where everyone has a decent place to live.”

Make-A-Wish Foundation: "That people everywhere will share the power of a wish.”

Teach For America: "One day, all children in this nation will have the opportunity to attain an excellent education

What do these have in common? What makes them memorable?

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Higher Education Examples

Mission: We educate students, advance research, and serve our communities.

Vision: A world where every learner has the opportunity to thrive and contribute to a better future.

Another Example...

Mission: We provide outstanding patient care, education, and research.

Vision: Healthier communities. Longer lives. Better futures.

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Mission Reflection

“why does our area exist?”

- What purpose remains constant regardless of changing circumstances?
- What fundamental need or problem do we exist to address?

Vision Reflection

“what future are we trying to create?”

- If our unit were wildly successful five years from now, what would be different because of our work?
- What are we known for?

Developing a Mission Statement for Your Unit

We **exist** to…	primary purpose, need served, or problem solved
For…	primary clients, stakeholder, or customer
In order to…	core services offered
So that…	long-term outcomes determining success

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Developing a Vision Statement for Your Unit

We **aspire** to be…	primary purpose, need served, or problem solved
For…	primary clients, stakeholder, or customer
By…	core services offered
So that…	long-term outcomes determining success

Developing a Mission Statement

We exist to…	primary purpose, need served, or problem solved
For…	primary clients, stakeholder, or customer
In order to…	core services offered
So that…	long-term outcomes determining success

Developing a Vision Statement

We aspire to be…	primary purpose, need served, or problem solved
For…	primary clients, stakeholder, or customer
By…	core services offered
So that…	long-term outcomes determining success

At Your Tables

30 mins

Work on your Strategy Map for your Unit:

- Mission
- Vision

Agenda Session III: Strategic Objectives & Strategy Map

Wednesday, 8:30-10:00 AM

Time	Topic
5 mins	Good morning!
15 mins	Peer Wisdom
20 mins	Strategic Objectives, Sweet Spot
45 mins	Group Work - 3 Strategic Objectives, Explore what your Unit's differentiators may be
5 mins	Close

Report Out Deliverables on Wednesday afternoon: (10 mins each, including Q&A)
Core Values, Vision, Mission (Session II)
3 Strategic Objectives, 1 Strategic Initiative, 1 Measure of Success per planning category (Session III & IV)

Report out (Wed afternoon): Your team can choose to report out in whatever way works best: powerpoint, visuals and description of which tools you used (we will review templates and tools in class)

Strategic Objectives Development

Strategic Objectives

Strategic Objectives are the "***what***," needs to be done to achieve success in **fulfilling your Mission.**

They break down the abstract concepts like mission and vision into **action-language**

They are **high level, measurable, and stable goals** that don't change from year to year

Check/Verify . . .

- Objectives should start with an action verb
- It should be measurable (or be able to track success)
- It should sustain for at least 3 years
- If it sounds like a project or task, it is probably an initiative, not an objective.

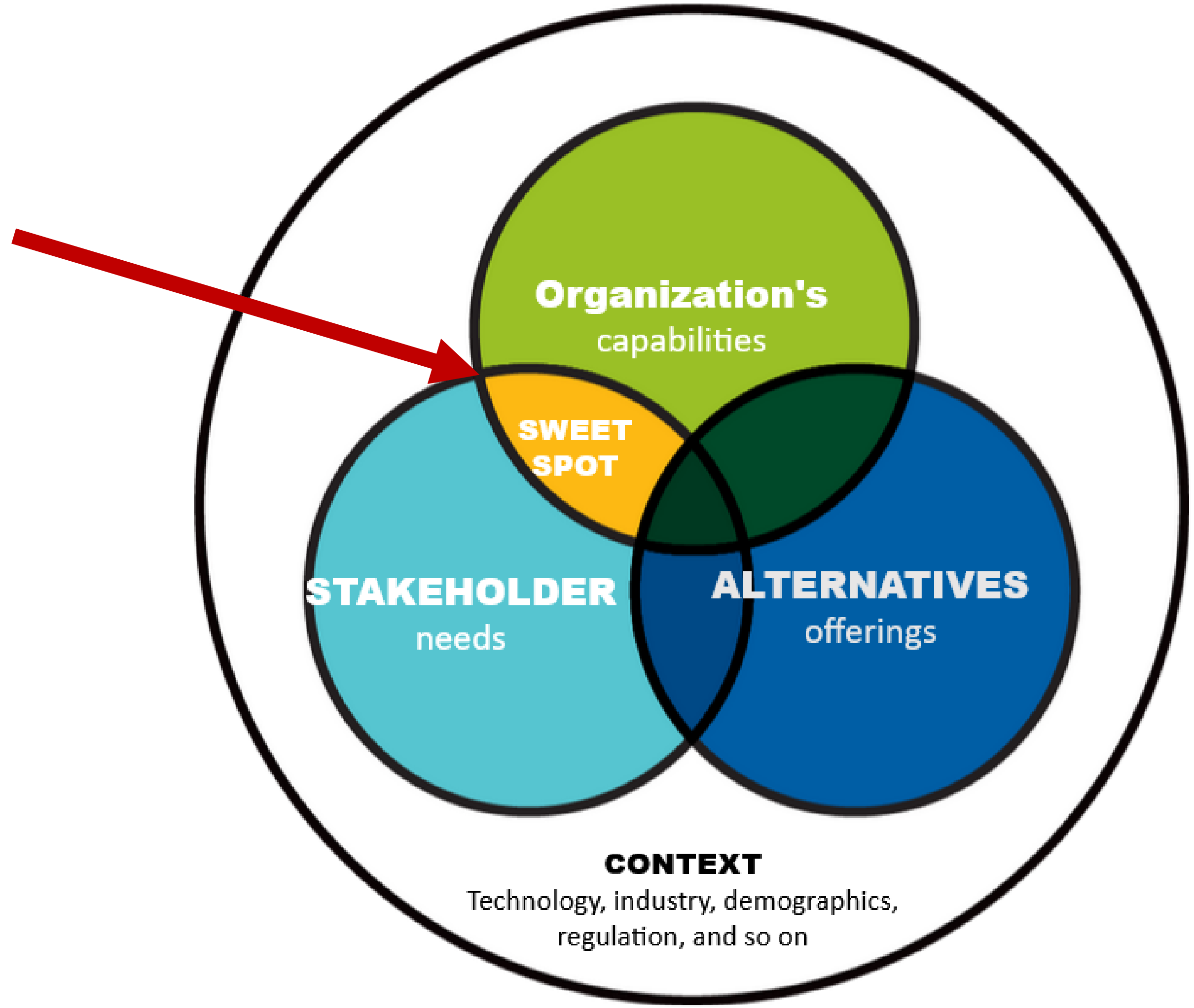
	Strategic Objectives		
Financial/ Stakeholder	Provide Coordinated and Informed Collaboration w/ Campus Partners	Increase Community Awareness, Messaging, and Marketing of Our Services	Increase Advancement Support and Participation
Customer Expectations	Provide Clear and Coordinated Support for Campus Stakeholders	Develop Faculty & Student Support Programs That are Versatile, Holistic, and Responsive	Partner with Faculty to Innovate and Improve Outcomes for All Students
Internal Processes	Develop Accountable and Transparent Practices that are Inclusive	Enable Cross-Unit Informed and Coordinated Support for Campus Stakeholders	Simplify policies and procedures to promote operational efficiencies
People & Culture	Sustain Equity-focused Structure, Processes, and Practices	Foster an Asset-based Approach to Employee Wellness and Development	Exemplify a Work Environment That is Trusting, Respectful, and Constructive

Questions to Consider

Financial/ Stakeholder	➢ What high-level goals would help ensure financial sustainability? How do we demonstrate our impact to the broader community?
Customer Expectations	➢ What do our customers/students expect or need from us?
Internal Processes	➢ What must we excel at to be internally efficient and effective?
People & Culture	➢ What do our staff need to thrive here? What does our climate need to be like here?

The Strategic Sweet Spot

The strategic sweet spot is where you offer unique value – where your strengths meet customer needs better than your competitors.



David J. Collis and Michael G. Rukstad, Harvard Business Review 2008

Slide credit: Kristin Kielich

Identifying your strategic sweet spot

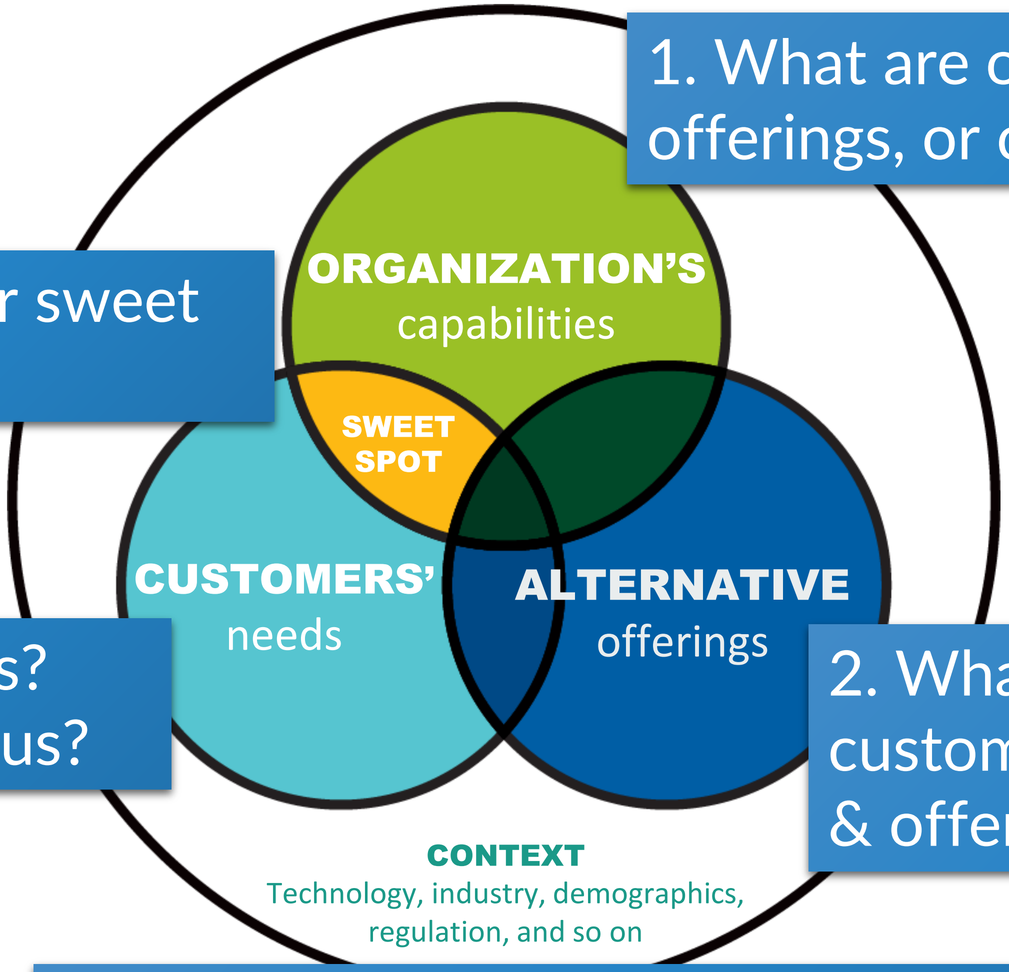
1. What are our capabilities, resources, offerings, or competencies?

2. What alternatives do our customers have for our services & offerings?

3. Who are our customers? What do they need from us?

4. What other context might provide us with an advantage?

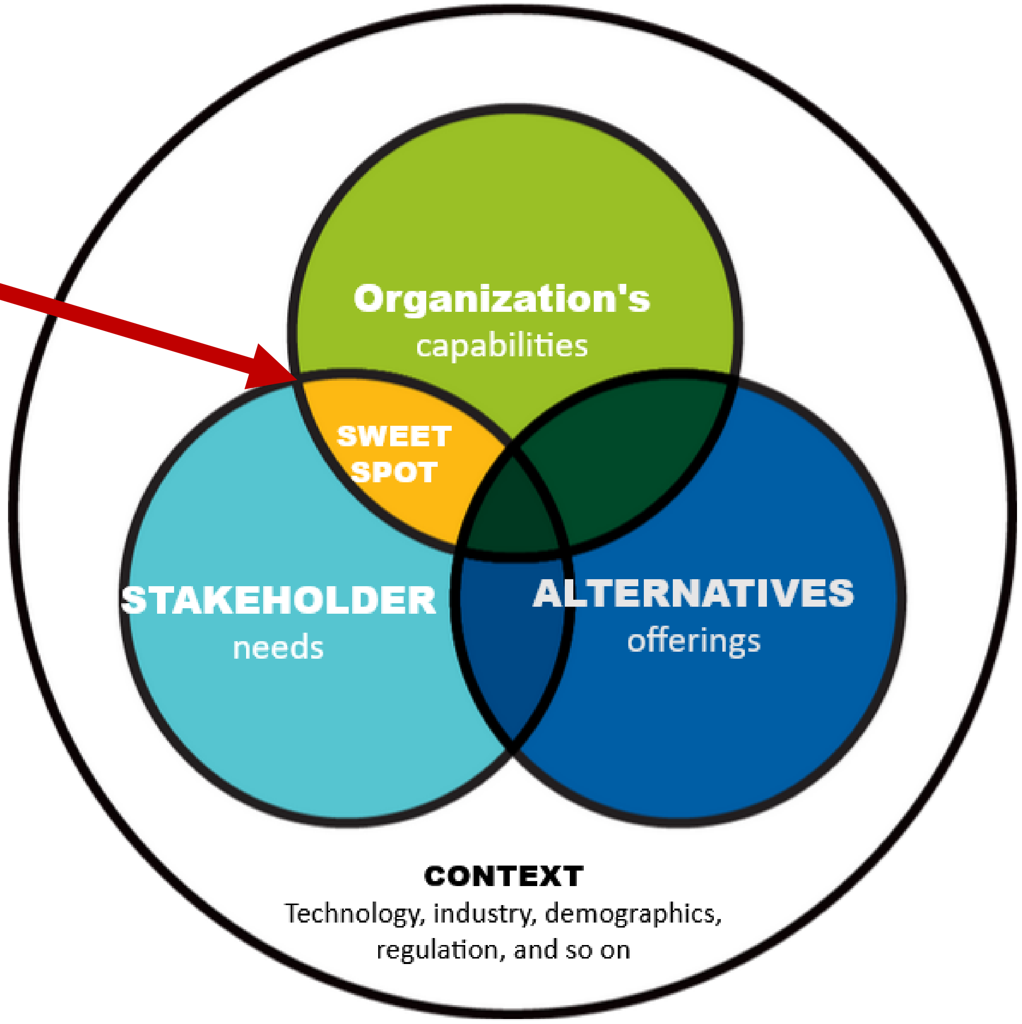
5. What is in our sweet spot?



Slide credit: Kristin Kielich

What is your Unit's Strategic Sweet Spot?

The strategic sweet spot is where you offer unique value – where your strengths meet customer needs better than your competitors.



David J. Collis and Michael G. Rukstad, Harvard Business Review 2008

Slide credit: Kristin Kielich

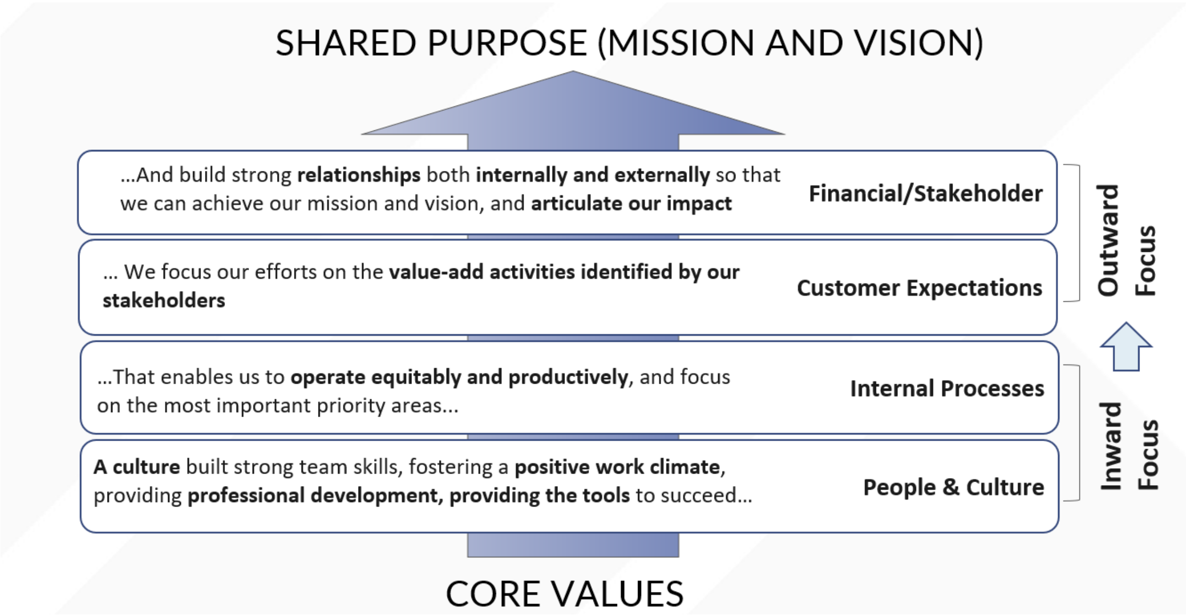
At Your Tables

40 mins

At your table, develop 2-3 potential Strategic Objectives for each Balanced Scorecard Perspective

- People and Culture
- Internal Processes
- Customer Expectations
- Financial/Stakeholder

Team Presentations: 7 minutes



1. What is your University, Mascot, and Unit you are representing?

2. Show your completed **Strategy Map**

3. Walk us through your Balanced Scorecard "Story" by stating your **Core Values**, and how they inform your **4 BSC perspectives**, and ultimately **deliver on your Mission**.

4. Describe a **Strategic Objective and its cause and effect connection with other objectives** to deliver on your Mission.

5. Give an **example of a Measure of Success for that objective**

6. Share a **Strategic Initiative** that will drive that Objective forward.

Agenda Session IV: KPIs & Making Strategy Real

Wednesday, 10:15-11:45 AM

Time	Topic
5 mins	Welcome back!
45 mins 5 mins 40 mins	Strategic Initiatives, Measures of Success (Metrics) BREAK 1 Strategic Initiative, 1 Metric, Finish Group Work, prep for Report Outs

Report Out Deliverables on Wednesday afternoon: (10 mins each, including Q&A)
Core Values, Vision, Mission (Session II)
3 Strategic Objectives, 1 Strategic Initiative, 1 Measure of Success per planning category (Session III & IV)

Report out (Wed afternoon): Your team can choose to report out in whatever way works best: powerpoint, visuals and description of which tools you used (we will review templates and tools in class)

What are Strategic Initiatives/Projects?

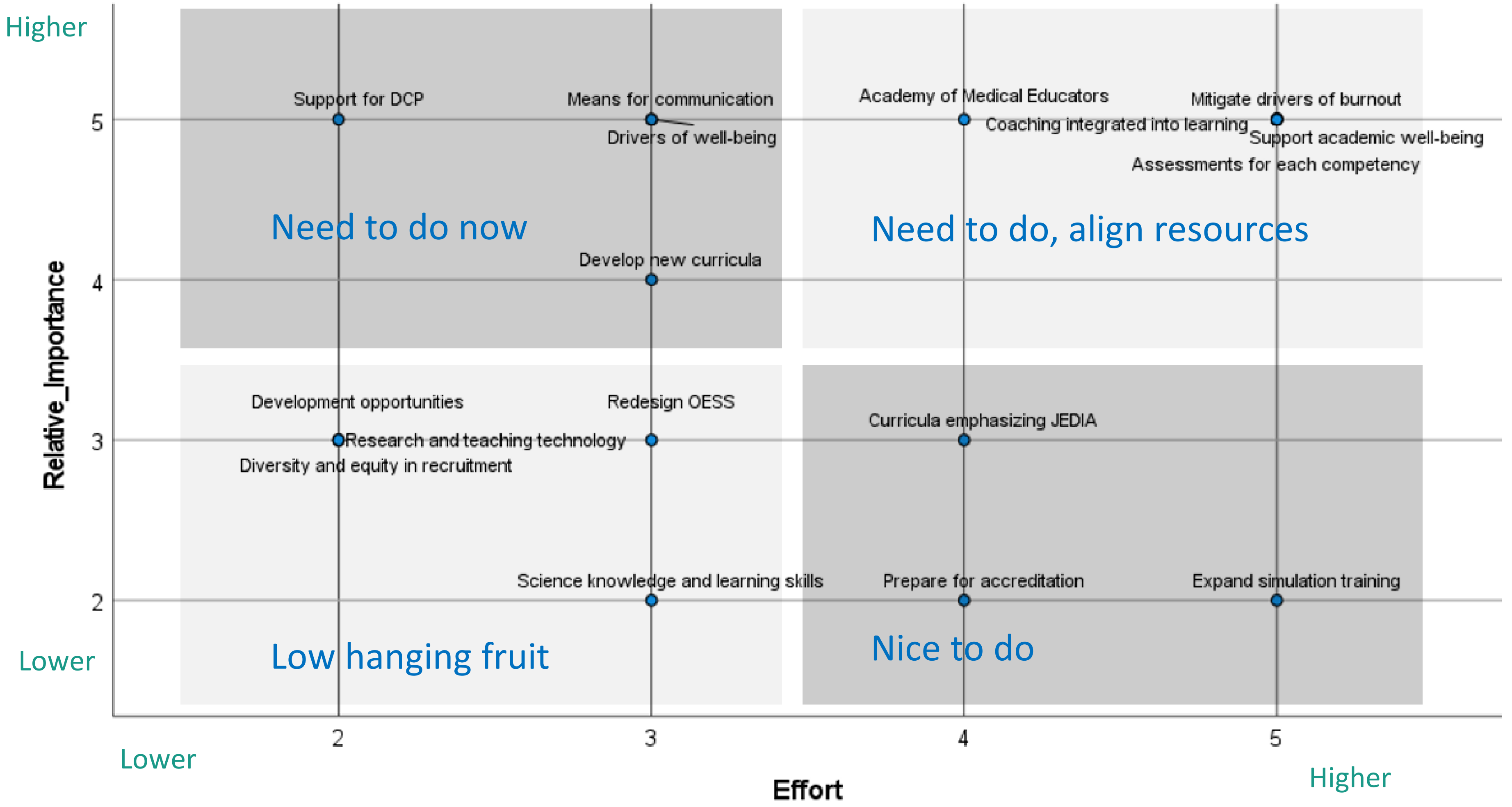
- Strategic Initiatives are the “how,” or the steps you will take to successfully accomplish the organization’s Mission.

- They are projects (new or existing) that help the organization achieve the Strategic Objectives

- They can be short term or long term, are measurable, and managed like any other project (i.e., have an owner, defined scope and schedule, and measurable outcomes)

Initiative	Label	Relative Importance	Effort
Augment support for the Office of the Associate Dean for Diversity and Community Partnerships and IDEA	Support for DCP	5	2
Design multi-media means for communicating our mission, vision and values, competencies, etc.	Means for communication	5	3
Attend to organizational drivers of well-being	Drivers of well-being	5	3
Implement an Academy of Medical Educators to promote faculty development and scholarly productivity across the Health	Academy of Medical Educators	5	4
Create an environment where coaching is integrated into learning and expected for growth and development	Coaching integrated into learning	5	5
Mitigate organizational drivers of burnout	Mitigate drivers of burnout	5	5
Support academic well-being through cognitive training,	Support academic well-being	5	5
Design programs of assessment for each competency	Assessments for each competency	5	5
Maximize direct observation and feedback to enhance competency development	Direct observation and feedback	5	5
Implement milestone-focused, outcomes-oriented tracking of competencies (i.e., outcomes	Tracking of competencies	5	5
Provide training to mitigate bias, minimize microaggressions, and	Training to mitigate bias	5	5
Develop new curricula related to value-based care, quality improvement and patient safety,	Develop new curricula	4	3
Develop recruitment and selection practices for medical students and residents / fellows that promote diversity and equity	Diversity and equity in recruitment	3	2
Enhance and adapt technological capabilities for curriculum design, teaching and research (i.e.,	Research and teaching technology	3	2
Provide coaching for leaders and other development opportunities (e.g., attendance at national / international conferences) for faculty and staff	Development opportunities	3	2
Redesign OESS to assist educators with instructional design / pedagogies	Redesign OESS	3	3
Design curricula on the etiology of health disparities and emphasize justice, equity, diversity, inclusion and anti-racism	Curricula emphasizing JEDIA	3	4
Develop foundational basic, clinical and health systems science	Science knowledge and learning skills	2	3
Continuously prepare for accreditation success (LCME, ACGME, ACCME)	Prepare for accreditation	2	4
Expand simulation training aimed at mastery learning using low-fidelity,	Expand simulation training	2	5

Example of Prioritization of Potential Initiatives



Measures of Success

"However beautiful the strategy, you should occasionally look at the results." – Winston Churchill

Measures Matter

To create alignment and coordination across the organization

To identify whether we are meeting stakeholder requirements

To ensure that decisions are based on data, not on emotion or gut feel

To show where improvements need to be made and guide meaningful continuous improvement

To show if improvements actually occurred

Types of Measures

Efficiency	• Are we doing things right? (Minimizing waste, optimizing resources, and managing costs)
Effectiveness	• Are we doing the right things? (Strategic alignment, hitting key targets, and achieving objectives)
Quality	• Are we doing things well? (Meeting high standards of excellence and delivering error-free output)
Productivity	• How much are we getting done? (Maximizing output volume and scaling effort relative to inputs)
Safety and Compliance	• Are we doing things safely and legally? (Protecting our people, mitigating risk, and following regulations)
Timeliness	• Are we doing things on schedule? (Meeting key deadlines, reducing cycle times, and delivering on time)

Characteristics of Good Measures: MARVO-C

Measurable

Can it be quantified or clearly observed?

Actionable

Does it drive behavior? Can you influence the result?

Relevant

Is it tied to strategic goals? Is it meaningful?

Valid

Does it measure what it is supposed to measure?

Objective

Is it free from personal bias? Is the definition clear?

Cost-Effective

Is the data easy to collect? Is the effort worth the insight?

At Your Tables

5 mins

Think of a measure at your institution that caused confusion or misalignment

- What made it unsuccessful?
- Which MARVO-C characteristic was it missing?
- Did it incentivize the wrong behavior?

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Types of Measures: Leading vs. Lagging

Leading Measures

Predictive. These drive change and provide the opportunity to adjust strategies *before* the result is final.

Example: % of faculty completing training on new technology.

Lagging Measures

Confirming. These provide accountability and tell you what already happened.

Example: Increased use of active learning techniques (post-semester).

Leading and Lagging Measures Examples

Perspective	Strategic Objective	Leading Measure	Lagging Measure
Financial/Stakeholder	Increase external funding	# of grant proposals submitted	Total external funding secured
Customer	Improve student satisfaction	% of students using support services	Student satisfaction survey score
Internal Processes	Streamline onboarding	% of onboarding steps automated	Average time to full productivity for new hires
People & Culture	Foster professional development	# of staff in development programs	Employee engagement score

Note: Leading measures tell you if you're on track; lagging measures confirm whether you succeeded.

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Types of Measures: Output vs. Outcome

Output Measures

What is done. Tracks the immediate results of activities, processes, or deliverables.

Example: # of students participating in peer mentoring.

Outcome Measures

Why it matters. Focuses on the broader impact, value, or result of those outputs.

Example: Increased graduation rates for participants.

Note: Outcome measures are usually **lagging indicators**, but whether a measure is leading or lagging depends on the downstream outcome you are trying to predict.

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Output and Outcome Measures Examples

Perspective	Strategic Objective	Output Measure	Outcome Measure
Financial/Stakeholder	Diversify and grow university funding	# of new alternative revenue streams launched	% increase in non-tuition revenue
Customer	Delivery high-quality academic programs	# of students who completed a curriculum	% graduation rate for the cohort
Internal Processes	Streamline student support systems	# of peer mentoring sessions held	% increase in term-to-term persistence
People & Culture	Cultivate teaching excellence and pedagogical innovation	# of hours of professional development training delivered	% increase in certified faculty actively using modern active-learning pedagogies

Note: Outputs are what is done (immediate results); Outcomes are why it matters (value and impact)

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Types of Metrics: Quantitative vs. Qualitative

Quantitative

Captures numeric data. Provides clear, objective metrics suitable for trending.

Example: Retention rates, survey scores (1-5 scale).

Qualitative

Captures descriptive or subjective data. Essential for understanding "why" and feelings.

Example: Focus group themes, open-ended survey comments.

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What to Watch for in Data Reporting

Common Pitfalls

Correlation vs. Causation

Survivorship Bias

Cherry-Picking

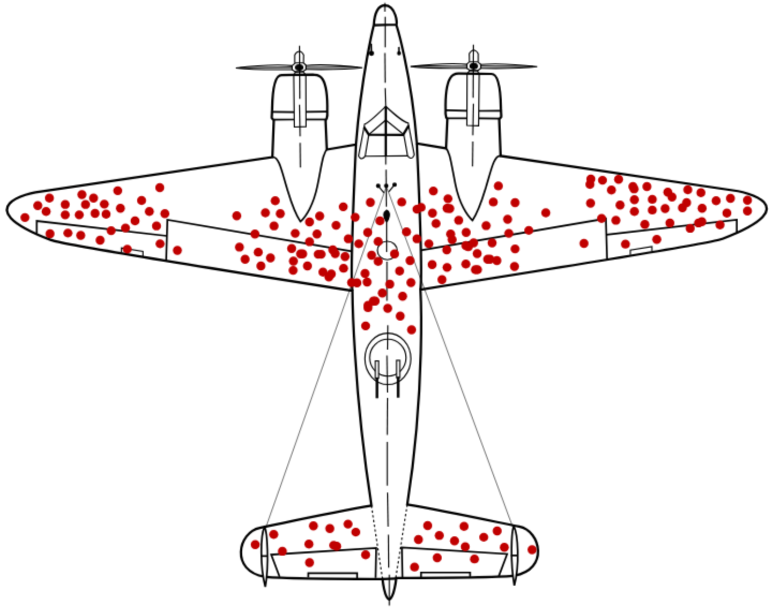
#1: Correlation vs Causation

Context is Key. Just because two variables move together doesn't mean one causes the other.

“Did you hear that eating ice cream causes drowning?"

Ice cream sales and drowning both rise in summer. Hot weather leads to more ice cream consumption and more swimming, which is why drowning incidents rise.

#2: Survivorship Bias



What’s missing?

Analyzing data only from those who "survived" the process. Focusing only on “Successes”

Example: Alumni surveys show that 90% of respondents are employed in their field of study.

However, only graduates who were satisfied with their education and career outcomes responded, ignoring those who did not achieve similar success.

Impact: Administrators might overestimate program effectiveness, ignoring potential curriculum improvements needed for struggling graduates.

#3: Cherry-Picking

Selectively presenting data that supports a specific narrative while suppressing contradicting evidence.

The “Good News” Filter

- **Example**: "Research funding is up 30%!" (omitting that it dropped 40% last year)

- **Impact**: Selective reporting can mislead stakeholders about the stability and growth of research capabilities, affecting future funding and strategic planning.

Which of these have you seen at your institution?

Correlation vs. Causation

Survivorship Bias

Cherry-Picking

At Your Tables

40 mins

Develop Strategic Initiatives for each Balanced Scorecard Objective

- People and Culture
- Internal Processes
- Customer Expectations
- Financial/Stakeholder

How would you Measure Success of these Objectives?

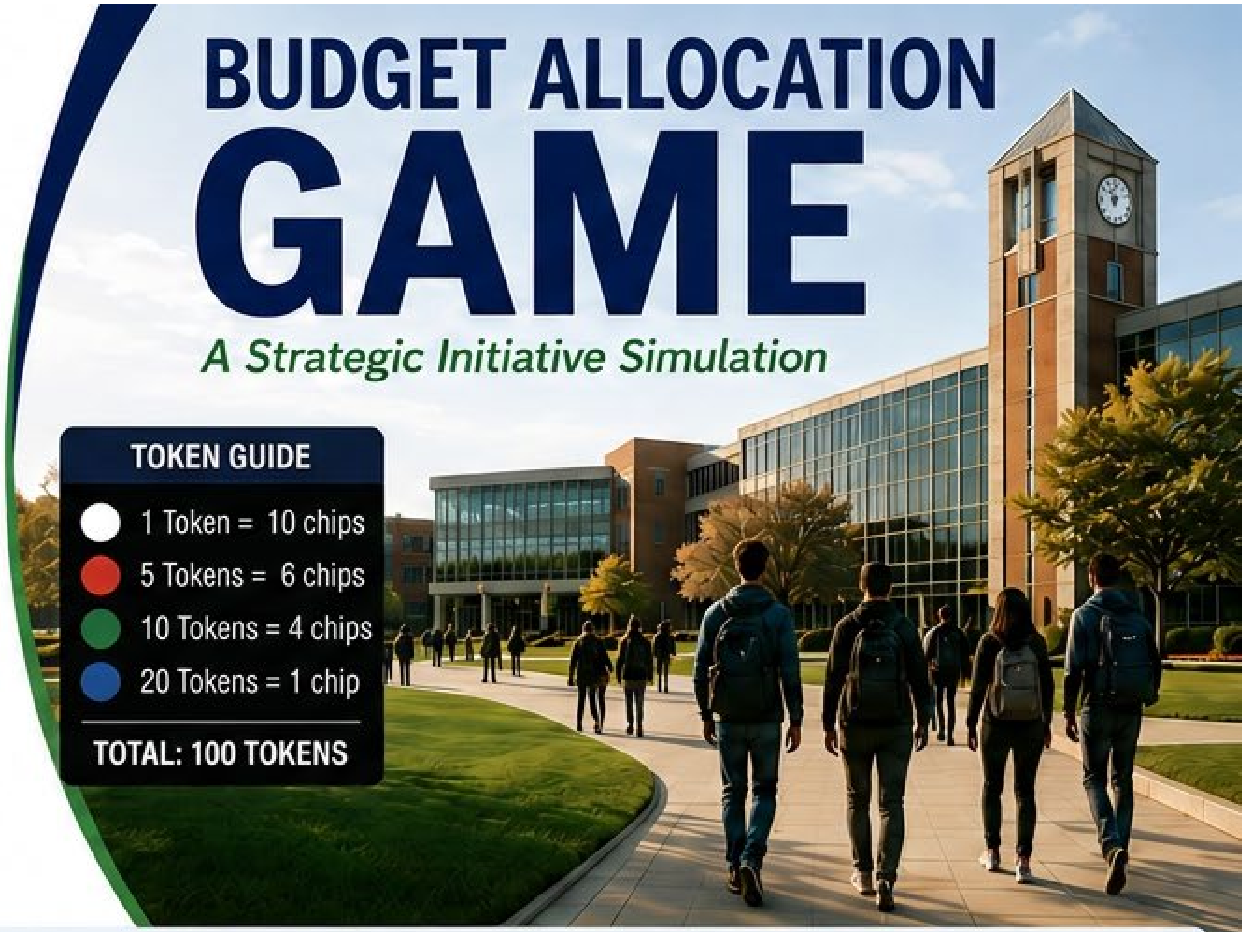
Agenda Session V: Resource Allocation Simulation, Report Outs, Peer Wisdom

Wednesday, 2:45 – 4:30 PM

Time	Topic
5 mins	Hello Again!
25 mins 10 mins	Resource Allocation Simulation Game Break and Prepare for Presentations
45 mins	Report Outs (7 mins per team) ✓ What are your Unit's Core Vales and Mission? ✓ Share one Strategic Objective for each Balanced Scorecard Perspective ✓ Pick one Strategic Objective and tell us how you will Measure its Success, and share a Strategic Initiative that will drive that Objective forward.
15 mins	Peer Wisdom and Discussion
5 mins	It's a Wrap!

BUDGET ALLOCATION GAME

A Strategic Initiative Simulation



Congratulations! The President likes your work so much that you've now been appointed to the University's Strategic Investment Committee.

Your job is now to make decisions for the entire university.

You have been entrusted with **100 Strategic Investment Tokens** to invest in initiatives that will create the greatest impact for the entire institution over the next three years.

Decide as a team how you will allocate these tokens and be prepared to explain your rationale.

Remember, there are no right answers, only strategic decisions.

1 Each Team has

100 TOKENS

100

Use your tokens to invest in the initiatives that will have the greatest impact.

2 Teams Choose:

- Top 3 Initiatives to Fund (with amounts)
- 1 Initiative to Skip or Cut

3 Report Out:

Top funded, one skipped, key stakeholder or change management strategy

STRATEGIC INITIATIVES BUDGET ALLOCATION

Investing in What Matters Most for Our Students, Our Faculty, Our Staff, and Our Future

TOKEN GUIDE

White	= 1 Token		x10 chips
Red	= 5 Tokens		x6 chips
Green	= 10 Tokens		x4 chips
Blue	= 20 Tokens		x1 chip

TOTAL = 100 TOKENS

1 FACULTY SUCCESSION PLANNING — COST 25 TOKENS

BENEFITS
- Recruit and retain outstanding faculty
- Ensure continuity of teaching and research leadership
- Strengthen academic excellence

TRADEOFFS/RISKS
- Benefits realized over 3-5 years
- Higher ongoing salary commitments
- Competitive market

2 FLEXIBLE HOUSING OPTIONS — COST 28 TOKENS

BENEFITS
- Increase affordability and access
- Meet diverse student needs
- Improve retention and satisfaction
- Advance sustainability goals

TRADEOFFS/RISKS
- Requires debt financing
- Construction disruption
- Higher operating costs

3 SHARED SERVICES EXPANSION — COST 28 TOKENS

BENEFITS
- Consolidate HR and Finance
- Standardize processes
- Improve efficiency and service
- Reduce duplication

TRADEOFFS/RISKS
- Change fatigue
- Upfront investment
- Complex implementation across units

4 INSTRUCTIONAL INNOVATION — COST 18 TOKENS

BENEFITS
- Modernize pedagogy and learning delivery
- Increase student engagement
- Prepare for future modalities

TRADEOFFS/RISKS
- Requires faculty time and training
- Technology adoption challenges

5 ONE STOP ADVISING — COST 24 TOKENS

BENEFITS
- Integrate academic, career and financial advising
- Improve student experience
- Increase persistence and on-time graduation

TRADEOFFS/RISKS
- Significant process change
- Technology integration complexity
- Requires cross unit collaboration

6 RESEARCH SEED FUND REALIGNMENT — COST 16 TOKENS

BENEFITS
- Invest in high-potential research
- Leverage external funding
- Enhance institutional reputation
- Support interdisciplinarity

TRADEOFFS/RISKS
- Competitive internal process
- No guarantee of external funding
- Limited immediate returns

7 RESIDENTIAL LIFE WELLBEING — COST 18 TOKENS

BENEFITS
- Expand mental health and well-being supports
- Improve student living experience
- Build a healthier, more supportive community

TRADEOFFS/RISKS
- Ongoing staffing needs
- Space limitations
- Coordination across partners

8 DINING SUSTAINABILITY OVERHAUL — COST 20 TOKENS

BENEFITS
- Improve food quality and experience
- Support local partners
- Reduce environmental impact
- Lower long-term costs

TRADEOFFS/RISKS
- Contract negotiation risk
- Upfront transition costs
- Supply chain complexity

9 UNIFIED GIVING PLATFORM — COST 22 TOKENS

BENEFITS
- Streamline donor experience
- Increase transparency
- Grow philanthropic revenue
- Strengthen donor relationships

TRADEOFFS/RISKS
- Data migration complexity
- Requires adoption across units
- Upfront technology cost

10 LOCAL EMPLOYER PARTNERSHIP — COST 18 TOKENS

BENEFITS
- Expand internships and jobs
- Build talent pipeline
- Support curriculum relevance
- Strengthen community impact

TRADEOFFS/RISKS
- Requires sustained relationship building
- Needs staffing capacity
- Results vary by economy

11 AI INTEGRATION IN TEACHING AND ADMINISTRATION — COST 18 TOKENS

BENEFITS
- Improve efficiency and decision making
- Enhance learning and support
- Enable predictive analytics
- Drive innovation.

TRADEOFFS/RISKS
- Data privacy and ethics
- Faculty and staff training needs
- Rapidly evolving technology
- Change management

12 CRISIS RESPONSE AND RESILIENCE PLANNING — COST 14 TOKENS

BENEFITS
- Strengthen emergency preparedness
- Protect people and operations
- Reduce risk and liability
- Improve communication

TRADEOFFS/RISKS
- Low visibility until needed
- Competing priorities
- Requires cross campus collaboration

STRATEGIC INVESTMENTS WORKSHEET

Investing in What Matters Most for Our Students, Our Faculty, Our Staff, and Our Future

BUDGET ALLOCATION
GAME
A Strategic Initiative Simulation

TOTAL BUDGET
100 TOKENS
(100 POINTS)

You have been appointed by your university Sr Leadership to be a member of a cross-functional team to decide how to invest

100 Strategic Investment Tokens.

Your goal is to select initiatives that will provide the **best impact** for the entire institution at the end of three years.

Decide as a team how you will allocate these tokens and be prepared to explain your rationale.

Remember, there are no right answers. only strategic decisions.

TOKEN GUIDE

White = 1 Token	x10 chips
Red = 5 Tokens	x6 chips
Green = 10 Tokens	x4 chips
Blue = 20 Tokens	x1 chip

TOTAL: 100 TOKENS

INVESTMENT TRACKER
Use this sheet to plan your investments

INITIATIVE NUMBER	INITIATIVE NAME	COST (TOKENS)	FUND? (✓ / X)	TOKENS INVESTED	NOTES / RATIONALE
1.	Faculty Succession Planning	25			
2.	Flexible Housing Options	28			
3.	Shared Services Expansion	28			
4.	Instructional Innovation	18			
5.	One Stop Advising Hub	24			
6.	Research Seed Fund Realignment	16			
7.	Residential Life Wellbeing Initiative	18			
8.	Dining Sustainability Overhaul	20			
9.	Unified Giving Platform	22			
10.	Local Employer Partnership Initiative	18			
11.	AI Integration in Teaching & Administration	18			
12.	Crisis Response & Resilience Planning	14			
TOTAL TOKENS INVESTED		**100**			

PORTFOLIO SUMMARY

Total Tokens Available ____________

Total Tokens Invested ____________

Tokens Remaining ____________

ONE INITIATIVE TO SKIP OR CUT

Initiative # ____________________

Initiative Name ____________________

Why did you skip or cut it?

____

____

____

____

____

University Mission and Vision

Our mission is to transform lives through excellence in education, research, innovation, and public service.

> *We prepare diverse learners to thrive in a rapidly changing world, generate knowledge that addresses society's greatest challenges, and partner with our communities to improve the well being of our region, nation, and world.*

Vision:

A world where knowledge creates opportunity and positive societal impact.

What does this budget simulation tell us about strategic planning?

- Strategic planning is rarely about choosing between good and bad ideas. More often, it requires choosing between multiple worthwhile opportunities when resources are limited.

- Effective leaders make those decisions by staying grounded in mission, considering enterprise-wide impact, and being willing to make difficult tradeoffs.

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Business Management Institute

Break

Team Presentations: 7 minutes

1. What is your University, Mascot, and Unit you are representing?

2. Show your completed **Strategy Map**

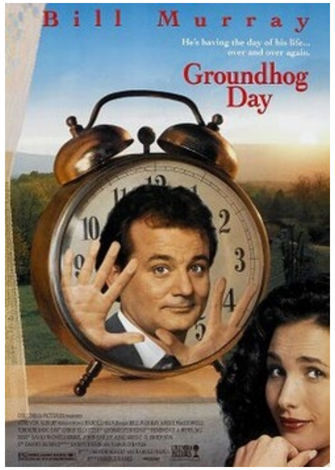
3. Walk us through your Balanced Scorecard "Story" by stating your **Core Values**, and how they inform your **4 BSC perspectives**, and ultimately **deliver on your Mission**.

4. Describe a **Strategic Objective and its cause and effect connection with other objectives** to deliver on your Mission.

5. Give an **example of a Measure of Success for that objective**

6. Share a **Strategic Initiative** that will drive that Objective forward.

Peer Wisdom and Practical Takeaways



- What challenges discussed resonate most with your institution?
- What lessons are most applicable to your own institution?
- What advice or key takeaway would you share with colleagues leading strategic planning efforts?

THANK YOU!

Angela Song-Ruiter, PhD
aysong@ucsd.edu

Appendix

SAMPLE BALANCED SCORECARD

Institutional Targets

URM 4-yr grad rate: 75%
First Gen 4-yr grad rate: 75%
Pell Eligible 4-yr grad rate: 75%
All Students 4-yr grad rate:75%
URM 2-yr transfer grad rate: 70%
First Gen 2-yr transfer grad rate: 70%
Pell 2-yr transfer grad rate: 70%
All Students 2-yr transfer grad rate: 70%

MISSION

We support and enhance student and faculty success through transformative, evidence-based teaching and learning practices

"What are we going to do?"

	Strategic Objectives			Intermediary KPIs	Output KPIs
Financial/ Stakeholder	Provide Coordinated and Informed Collaboration w/ Campus Partners	Increase Community Awareness, Messaging, and Marketing of Our Services	Increase Advancement Support and Participation	# joint grant submittals # of campus collaborations formed/sustained # of faculty/student speaker series # consultations provided # of campus outreach	Joint grants awarded and $$ National articles recognizing XYZ Student grades improvements Faculty assessments improvements Student participant persistence & retention
Customer Expectations	Provide Clear and Coordinated Support for Campus Stakeholders	Develop Faculty & Student Support Programs That are Versatile, Holistic, and Responsive	Partner with Faculty to Innovate and Improve Outcomes for All Students	# of student / faculty hours at XYZ # of referrals to XYZ # repeat XYZ usage by student, faculty # new programs delivered # new students and faculty participants	Faculty & Staff Satisfaction Survey scores Student Satisfaction Survey scores Systemwide UG Survey scores Systemwide Grad Survey scores
Internal Processes	Develop Accountable and Transparent Practices that are Inclusive	Enable Cross-Unit Informed and Coordinated Support for Campus Stakeholders	Simplify policies and procedures to promote operational efficiencies	# of processes streamlined & documented % time savings realized from process optimizations % completion of programs & services eval plans # of facilitated internal trainings	XYZ Staff@Work Survey scores (on valuable training & development, spirit of cooperation, and behavior & conduct, overall satisfaction, etc.)
People & Culture	Sustain Equity-focused Structure, Processes, and Practices	Foster an Asset-based Approach to Employee Wellness and Development	Exemplify a Work Environment That is Trusting, Respectful, and Constructive	% response rates for staff surveys % participation in training and development % participation in voluntary team activities	eNPS score on S@W Survey XYZ Climate Survey scores Turnover and Retention XYZ Diversity Dashboards goals

Strategic Initiatives

- Perform program reviews with ABC
- Identify and expand of Digital Delivery for online courses
- Develop new faculty onboarding; faculty fellows programming
- Expand services to DEF, GHI, JKL
- Rebrand XYZ
- Develop new pipeline models with …
- Initiate joint fundraising with …
- Implement annual Strategic Focus Retreat
- Review hiring and lifecycle practice
- Invest in professional & student staff training
- Include EDI into performance review
- Develop internal documentation & library
- ITS unification in platforms

VALUES

Core Values: Transformation, Belonging, Collaboration, Authenticity, Compassion

Example "Strategic Pillars" or "Themes" with Balanced Scorecard Perspectives

	Strategic Pillar: STUDENT SUCCESS	Strategic Pillar: RESEARCH EXCELLENCE
Financial/Stakeholder "How do we ensure we have the resources to succeed? Or "How do we responsibly manage the resources entrusted to us?"	**INCREASE FINANCIAL RESOURCES THAT SUPPORT STUDENT SUCCESS** **Measure**: Increase student success grant funding by 20% **Initiative**: Launch a student success fundraising & grant initiative	**GROW RESEARCH FUNDING** **Measure**: Increase grant dollars awarded by 20% **Initiative**: Develop a strategic grant and research partnership initiative
Customer Expectations "How do we create value for our stakeholders?"	**IMPROVE STUDENT PERSISTENCE** **Measure**: Increase first-year retention from 86% to 90% **Initiative**: Redesign the first-year student experience through proactive advising, peer mentoring, and success coaching	**INCREASE RESEARCH IMPACT AND REPUTATION** **Measure**: Increase publications in top-tier journals by 20% **Initiative**: Expand interdisciplinary research initiatives
Internal Processes "What must we excel at to succeed?"	**DELIVER PROACTIVE, COORDINATED STUDENT SUPPORT** **Measure**: 90% of at-risk students receive advisor outreach within 72 hours of an early alert **Initiative**: Implement an integrated early alert and case management system	**STREAMLINE RESEARCH ADMINISTRATION** **Measure**: Reduce grant proposal turnaround time from 20 to 10 days **Initiative:** Modernize the grant submission & approval process
People & Culture "How do we build our people capacity to succeed?"	**BUILD FACULTY AND ADVISOR CAPABILITY TO SUPPORT STUDENT SUCCESS** **Measure**: 95% of advisors & first-year faculty complete student success training **Initiative**: Launch a Student Success Professional Development Academy	**BUILD FACULTY RESEARCH CAPABILITY** **Measure**: 90% of new faculty complete grant development training **Initiative**: Launch a Faculty Research Development Program