LEAD Workshop
Strategic Planning

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A Community of Innovators
Strategic Planning ABCs

• Where are we now?

• Where do we want to be?

• How will we get there?

• How will we know when we’ve arrived?
Preplanning

Decide On:

• Process

• Participants

• Time frame

• Tools – e.g., statistics/SWOT analysis
Environmental Scan

- Internal scan – full SWOT analysis
- External scan – know your competitors
- Compare with close competitor
- Compare with leader in the field
SWOT Example

• Strengths and opportunities are easy

• Weaknesses and threats are hard

• Example
Formulate Strategy

• Develop vision

• Develop mission

• Develop values

• Develop goals
Implement Strategy

• Develop tactical goals related to overall strategy

• Develop budget – faculty positions, staff support, enrollments, facilities … - where is the money coming from?

• Develop action plan, including all partners – identify others who should help invest in your plan (UOPM)
Evaluation

• Define metrics and evaluate yearly against these metrics

• Readjust milestones yearly using metrics

• Devote significant time at annual retreat to update and adjust the strategic plan
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