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Field Notes: Visions, missions, and strategic plans 101

By Marie-Jose' (M.J.) Caro, former Registrar, Daytona Beach Campus, Embry-Riddle Aeronautical University and Edward F. Trombley III, Registrar, Worldwide Campus, Embry-Riddle Aeronautical University

At the American Association of Collegiate Registrars and Admissions Officers (AACRAO) National Conference, March 2018, in Orlando, Florida, Marie-Jose' (M.J.) Caro, who was serving as the Registrar, Daytona Beach Campus, and Edward F. Trombley III, Registrar, Worldwide Campus, Embry-Riddle Aeronautical University, shared an interactive session entitled "Visions, Missions, and Strategic Plans 101." In this presentation, they discussed the importance of strategic planning within academic offices and divisions, and how difficult it is to balance day to day work load with long-term strategic planning. MJ's experience was working with her office staff to create a department strategic plan, while Ed had worked as part of a team creating a strategic plan for the enrollment management division at their respective branches of the university.

Rallying the troops

The initial step in preparing your team to embark on strategic plan creation is rallying the troops. It is incumbent upon the manager to demonstrate to the staff that there is a purpose to the activity; it isn't "just an exercise." Demonstrate enthusiasm for the project, and share examples of prior successes from within the institution if possible, or from like institutions.

Also, share the long-term goal of how the plan will be utilized on an ongoing basis, how goals will be assessed and how the plan ties in to day-to-day activities. The team should understand that the process will involve either the creation, or incorporation, of a vision statement and mission statement into the ultimate strategic plan.

The Vision Statement

The vision statement sets the direction for the organization with a concrete and aspirational view of the future, and should be inspirational, memorable, clear and concise. It should reflect what you are hoping to become; where you want to end up at the end of your project. Organizational and divisional leadership are expected to contribute to the creation of the vision statement, as it is a "big picture" view, without the specifics of a mission statement.

The Mission Statement

The mission statement defines the organization's purpose, describes its prime functions, and explains what we do now. MJ shared that with her team, working on a department vision statement, the initial urge was to create a task list. While a mission statement is not a task list, the list was itself a good place to start, with the team all contributing to the process of listing tasks, functions, and outcomes. From there, her team was able to edit and coalesce the tasks into a mission statement reflecting the general areas of focus and service, while still mentioning aspirational qualities such as strive for continuous improvement by embracing emerging technologies.

Ed discussed the benefits his team found in utilizing the traditional "SWOT" analysis, examining the Strengths, Weaknesses, Opportunities and Threats impacting the daily operations and business practices

of the enrollment management division. The presenters pointed out that divisional/departmental leadership are also expected to contribute to the mission statement, however input from everyone is essential to ensure “buy in” from the teams.

The Strategic Plan

The creation of the strategic plan is, in essence, where the rubber meets the road--moving from “philosophical” to “practical,” from “strategic” to “tactical,” and making the vision and mission an operational reality. In MJ’s office the team was of a size that all were able to participate in the creation of the strategic plan, while in Ed’s situation, divisional planning team areas were assigned to manage subject areas. The sub-committee areas included Admission and Recruitment, Marketing, Academics, and Retention and Student Success, but these subject areas may be broken out in whatever fashion best suits institutional needs.

In either arrangement, the goal of the group or sub-committees is to create the strategic plan draft via these four stages:

Stage 1: Input and assessment: Cross-departmental discussion of current and future states

Stage 2: Synthesis: Cross-departmental definition of desired outcomes

Stage 3: Strategy development: Cross-departmental definition of desired goals

Stage 4: Implementation: Act, assess, review and act again

Never fail to follow up

MJ and Ed concluded their presentation by stressing the importance of reminding the team of the strategic plan—including it in daily activities, department planning session and team meetings to demonstrate the usefulness and connectedness of the document to basic operations. The importance of assessing progress and shortfalls was reiterated, as well as the concept that the document was never actually complete: it should be assessed periodically and updated regularly to incorporate changes in business process and procedure. Remember to prove to the team that it wasn’t just an exercise!