

Planning to plan: Setting up your strategic planning process for success

Strategic planning is a key initiative for theological schools and is critical to the strategic planning process. Before initiating your strategic planning process, spend some time setting it up for success.

There are four essential questions to address as you prepare for strategic planning:

1. Why do a strategic plan?
2. Is your school's mission and vision for the future clearly understood and articulated?
3. What is the process you will use?
4. Do you understand the unique aspects associated with your school as they relate to larger trends in theological education, post-secondary education, and society at large?

Why do a strategic plan?

There are many reasons organizations decide to develop a strategic plan.

The following are some of the most common:

- **Routine best practice.** For some organizations, strategic planning is a routine practice embedded in how business is conducted. These organizations regularly assess progress on their current plans. They also examine business conditions and update their plans on a cyclical basis, often every 3–7 years, depending on the dynamics of their current situation and changes in the environmental landscape.
- **Investor/grantor/funder requirement.** In some cases, an investor, grantor, or funder may require a current strategic plan be included in their application process. There may be specific components they require to be included — components that inspire confidence that the funds will contribute to mission or vision achievement. They may also want to ensure that there is organizational alignment with their mission or that they will see a specific return on their investment.
- **Accreditation requirement.** Having a current and comprehensive plan may be required or strongly recommended by an accrediting agency. A strategic plan is generally considered a “best practice.” It establishes a clear roadmap to ensure financial sustainability.

- **Response to major organizational change.** If a theological school is considering a merger, partnership, or reorganization, having a strategy and specific plans is critical. Organizational change always requires a close look at many factors related to financial management, operations, academic planning, partnership alignment, coordination, transition and more. Change requires a reassessment of mission and vision and it demands that you have the right plans in place to achieve an aligned future state.
- **External factors.** Environmental, societal and political factors, including pandemics, can present both new challenges and opportunities that can impact current and future initiatives and strategies.

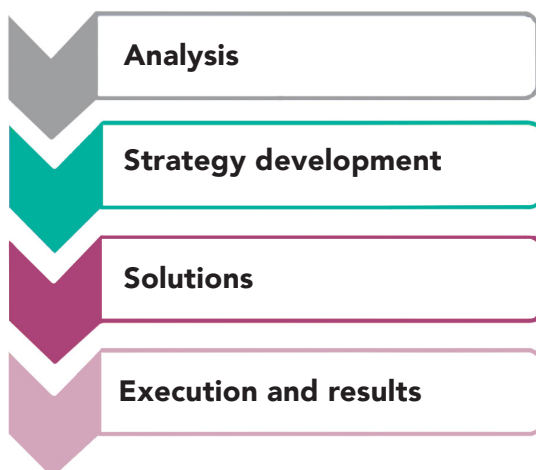
Determining your reason for strategic planning will help you to determine what needs to be integrated into your process.

Is your school's mission and vision for the future clearly understood and articulated?

Having a clear understanding of your school's mission or purpose is a critical aspect of strategic planning. If you cannot clearly articulate the purpose already, then you need time to dedicate to mission validation, development, or refreshing.

It is also critical to have a clearly defined vision or dream of the future. A vision needs to be both aspirational and inspirational. It should provide a visual picture of where your school aspires to be at a future point in time, usually 5–10 years out. Visioning provides you with the opportunity to dream big and to articulate the future state in a way that provides a destination. Your strategic plan will then serve as the roadmap to your future state or destination.

If there has been an organizational change that involves a merger, acquisition, or partnership, it will be important for the mission and the vision to be aligned with that of the other organization. Mission and vision validation, and refreshing, if necessary, should be integrated into your strategic planning process.



What is the process you will use?

If you have a current strategic plan that you are updating, or if you are developing a plan for the first time, it is essential to follow a process. Key elements to a successful process include the following:

- Analysis.** A comprehensive outreach to internal and external stakeholders, along with the completion of a SWOT analysis.
- Strategy development.** Identification of key strategic areas that fulfill the mission and map to the future state.
- Solutions.** Defining associated actions and initiatives that are necessary to achieve each strategic area.

Execution and results. Detailed action plans, milestones, accountabilities, timelines and metrics, including a performance dashboard to assess progress and facilitate continuous improvement.

It is essential to determine who will lead the process. Do you have the internal expertise to facilitate the process, or will an external consultant be needed? If so, what will be the criteria you use in the selection of a consultant? Who will serve on your strategic planning team? You will want to ensure you have representation from leadership, faculty, staff, board, alumni, and others, dependent upon your structure and situation.

Lastly, understanding the timeline and any deadlines is essential. A comprehensive strategic plan generally takes a minimum of six months and, more often, 9–12 months to complete. The actual time necessary to complete a plan is dependent upon whether the mission/vision needs an update, the availability of strategic planning team members, the scope of stakeholder outreach, the board approval process and your specific situation.

Do you understand the unique aspects associated with your school as they relate to larger trends in theological education, post-secondary education, and society at large?

Every school has its own unique culture and situation that need to be defined and understood. These unique aspects need to be integrated into the planning process. Furthermore, the environment within which theological schools exist today is highly dynamic. It is also essential to understand those trends that will have an impact on the strategic decisions. The In Trust Center and the Association of Theological Schools provide excellent resources on trends and best practices.

The best strategic plans are those that are well led and facilitated. Taking the time upfront to answer the four questions above will ensure you are ready to kick off your strategic planning process.

Written by Carol Marturano-Becker, president of IMPACT Learning Inc. Contact Carol at carol@impactlearninginc.com.



In Trust Center members and affiliates have permission to print and share this resource.
To learn more, contact resources@intrust.org.