

A photograph of two women in a meeting. The woman on the right has curly brown hair, is wearing a blue sweater and a necklace, and is holding a pen while speaking. The woman on the left has long dark hair and is seen from the back. The background is a blurred office setting with windows.

4 Essential Steps to Create Actionable Strategic Plans in Higher Education

A strategic planning approach that unites stakeholders and drives transformative change

You can't afford to have a strategic plan that just sits on a shelf ...

Have you participated in a strategic planning process only to see enthusiasm for change fizzle out once the plan is complete? This is not an unusual scenario, but today's challenges call for strategic plans – and a planning process – that inspire aligned action.

TODAY'S HIGHER EDUCATION LEADERS ARE FACING:



Seeking a path to financial sustainability due to massive state disinvestment and shrinking enrollment.



Balancing the history and traditions of institutions with the imperative to innovate and transform to meet the needs of current and future students.



Tough questions about everything from learning modalities and diversity, to return on investment and mental health.



Changes in the institutions and their offerings to better serve their students and keep pace with a rapidly changing working world.



Shifting cultures to be more innovative while also being more inclusive and student-focused.



Laying the Groundwork

Why are you creating a strategic plan? An effective strategic plan begins with this simple question. A clear vision for the goals of the strategic plan is essential before the planning process begins. Even if the primary driver for creating the plan is to meet accreditation requirements, it can be an invaluable means of educating and motivating stakeholders to embrace change and exchange ideas across often siloed communities.

IT BEGINS WITH COLLABORATION

Collaboration is the foundation of a successful strategic planning process. Through an inclusive and collaborative process, you can build trust and support across a diverse set of stakeholders, accurately reflect your organization's vision for the future, and inspire champions for the plan across communities.

But how do you include **all** voices and still speak in unison to create an actionable strategic plan? This is both the challenge and the magic of effective strategic planning – through careful listening and moderation, a chorus of voices and opinions can meld into a singular vision with broad buy-in and support.



In the following pages we outline **four essential steps** to facilitating a planning process that unites diverse stakeholders around common goals to create a strategic plan that drives measurable results.



Step 1: Prepare, Design, & Plan



Step 2: Listen, Engage, & Analyze



Step 3: Develop & Finalize
a Focused Plan



Step 4: Take Action



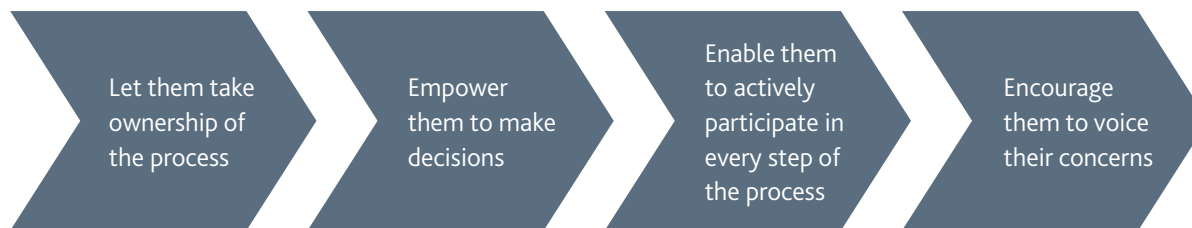
Step 1: Prepare, Design, & Plan

You have established the “why” behind your strategic planning. What next?

- ▶ Determine the governance model that will best support the planning process for your university or college and establish a timeline for the strategic planning process.
- ▶ Take time to understand the distinct needs and culture of your institution and your leadership's vision for the future, for the planning process, and the key data, trends, and issues that need to be considered as part of the process.
- ▶ Be ready to respond to probing questions with data to establish credibility and to dispel unhelpful “myths” that may exist in the organization.
- ▶ Design an approach that will engage all stakeholders in the planning process, looking for opportunities to bring diverse groups together to hear from one another and cross-pollinate ideas to build shared understanding and create more innovative, impactful solutions.

PRO TIP: SHARE RESPONSIBILITY & OWNERSHIP

Find the right people (think “team players” and influencers from key stakeholder groups) to participate on your strategic planning committee, then:



By fostering shared responsibility throughout the process, they will help champion the resulting plan and play a vital role in your success.



Step 2: Listen, Engage, & Analyze

Facilitate the process that you designed in Step 1 to deeply engage all stakeholders. Help them understand the purpose of the strategic planning process and why it is important so they know their time is well spent. Highlight opportunities that could be realized in the future when the strategic plan is implemented. Ongoing communication about the strategic plan “story” with different stakeholders is essential to open dialogue, maintain support, and generate additional interest.

Need some inspiration? Here are a few ways we have fostered engagement during the strategic planning process for our higher education clients:

- ▶ **Interactive workshops** that bring together diverse groups for conversation and idea generation
- ▶ **Targeted surveys** to gather input from students, alumni, faculty, and staff
- ▶ **Focus groups** with specific groups or mixed groups to gather nuanced input
- ▶ **Town halls and/or open forums** to share context, build understanding, and solicit ideas and input
- ▶ **Compelling infographics and visuals** to help spur learning and new kinds of conversation
- ▶ **Facilitated forums** with industry partners, donors, alumni, and community stakeholders

Once you have gathered both quantitative and qualitative insights, work with your governance team to illuminate key themes, generate critical insights, understand hot button issues that need to be addressed, and identify priorities, focus areas and innovative ideas.

You want to develop a process that both elicits input about goals and initiatives and builds a shared context and responsibility with all key stakeholders, preparing the community to embrace the priorities and vision outlined in the plan.

PRO TIP: PRIORITIZE TRANSPARENT COMMUNICATION

Transparency, more than anything, builds trust. If your stakeholders are going to buy into the plan and help move it forward, **they need to trust you and trust the process.** They also need to see how their ideas and inputs are being captured and shared through regular, transparent updates and communications.



Step 3: Develop & Finalize a Focused Plan

Your strategic plan is not a “to do” list. The most effective plans hone in on the key tasks that are essential to realize overall goals. Consult with the people who will play an active role in achieving goals to prioritize initiatives and establish realistic metrics before crafting a plan. Drawing on the stakeholder input:

- ▶ Create new or update existing mission, vision and value statements
- ▶ Determine key focus areas
- ▶ Establish priorities and goals for each area
- ▶ Identify and prioritize near- and long-term initiatives to support the achievement of each goal and delegate ownership to responsible individuals
- ▶ Establish metrics to evaluate progress and success in achieving goals
- ▶ Work with the designated governance team and campus leadership to write, review, fine-tune and finalize the draft plan document
- ▶ Validate the draft plan with the broader stakeholder community and incorporate additional feedback through open forums or a final survey
- ▶ Finalize a plan with buy-in from all

A successful strategic plan is distinct, compelling, clear, and actionable — summarized in a simple and accessible format. Stakeholders should relate to and feel inspired by your institution's aspiration and understand the path to achieve the desired future.

PRO TIP: WHAT DOES A PLAN LOOK LIKE?

Some plans are bound, formal documents – but they don't have to be. At BDO, we have created plans as visual maps, one-page overviews, flow charts, websites and more.



Step 4: Take Action

We have seen 40-page strategic plans that gather dust, as well as one-page planning flowcharts that became essential roadmaps for future success. The difference often lies in accountability and follow-up **after** the hard work of strategic planning is completed. Here are a few ways to help ensure that your strategic plan is implemented:

- ▶ Work with stakeholders to build the implementation governance structures and processes necessary to support ongoing accountability.
- ▶ Consider expanding capacity in key areas such as communications, leadership development, measurement/metrics and others to ensure ongoing collaboration and governance operates smoothly.
- ▶ Charter and equip work groups, task forces, or other cross-organizational structures as needed to help ensure effective plan implementation.
- ▶ Communicate the strategic plan internally and externally to enhance accountability.
- ▶ Regularly track progress, measure success, and report goal metrics and achievements.
- ▶ Evaluate the plan at a regular cadence and adjust as needed.

PRO TIP: THINK BEYOND THE PLAN

The real work starts after the plan is done—prioritize initiatives, stay flexible, and know your limits. Effective strategic planning means making tough choices, asking critical questions, and sometimes saying “no” or “not yet.”



Triggers that May Call for a Major Plan Update

An effective strategic planning process will help you create a “living document” that truly guides the priorities and focus of the institution over time. It’s important to review and update your strategic plan to keep it relevant and focused, but sometimes more significant changes are needed. Here are four scenarios that indicate it might be time for a whole new strategic plan:

MARKET FORCES AT WORK

External factors—like new technologies and changing demographics—can dramatically change everything from student expectations, to modes of teaching, to the way we deliver programs and services. These forces may bring challenges, but they also offer opportunities to improve efficiency, expand reach, and deepen impact. For mission-driven organizations with limited resources, a current and flexible strategic plan is key to staying responsive and focused.

YOU'RE UNDER NEW LEADERSHIP

New leaders often come in with a new vision. This might even be the reason they were hired! New leaders need a way to engage their stakeholders to build a truly aligned vision and plan. A well-designed strategic planning process can be an extremely effective way for a new leader to engage their team and broader community of stakeholders in identifying and working toward a shared vision.

YOU WANT TO ATTRACT ADDITIONAL FUNDING

If you want to engage new stakeholder commitment among the potential donor community, you'll need a strategic plan that tells your story, articulates your goals, inspires increased confidence in your work and, hopefully, encourages increased giving. The result is a strategic plan that funders quite literally are invested in helping you achieve.

IT'S BEEN A WHILE

The world — and the higher education environment — has changed rapidly over the past few years. An up-to-date strategic plan has never been more vital both to create a roadmap for the future and as a way to engage and align your institution and its stakeholders around a common vision.

PRO TIP: COMMIT TO MAKING CHANGES – ESPECIALLY LEADERSHIP

Change is hard, especially for long-standing organizations. However, external forces often require major shifts. Leadership must commit to letting go of outdated processes and embrace necessary changes to ensure your strategic plan's success.



Need support developing and implementing a strategic plan?

BDO has collaborated with universities and colleges throughout the planning process. Drawing from a deep bench of experience in everything from change management and culture transformation to leadership development, communications, and organizational effectiveness.

BDO IS UNIQUELY POSITIONED TO:

- ▶ **Craft a strategic planning approach** that is tailored to the needs and goals of your institution
- ▶ **Design data gathering and engagement strategies** that will ensure effective planning outcomes and robust stakeholder engagement
- ▶ **Foster leadership engagement** to drive the strategic planning process
- ▶ **Design and facilitate events** to encourage 360 degree input and feedback from all stakeholders
- ▶ **Serve as an objective third party** to draw out candid feedback
- ▶ **Partner with the Strategic Plan governance team** to ensure their effective leadership and guidance, from data gathering through draft creation and implementation
- ▶ **Provide interdisciplinary post-planning expertise** to guide the implementation of the strategic plan



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