

# **Student Leader Strategic Planning Handbook**

Engineering Leadership Program  
Engineering Student Services  
College of Engineering  
Iowa State University

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# Introduction

Have you ever asked or said to yourself...

Why do we do what we do in our club?

Does anyone know what our purpose is?

Are we fulfilling our purpose?

What expectations do I have of my club?

Are my expectations being met?

Why do we do the same thing over and over?

Why does it feel like the only people really involved are the executive team?

Are we being effective as a club?

Are we meeting our goals?

What are our goals?

[Insert more questions here]

*I feel like we could be doing more as a club, but I'm not sure what that is or what it looks like.*

If so, then these questions may be an indication that your organization could benefit from the strategic planning process. This process helps organizations identify and evaluate their purpose, or mission, and a vision for where the organization would like to end up in a given amount of time – a year, three years, maybe five years' time. (Surprise! You can envision where you think your organization might be in five years, even if you are no longer at Iowa State!) Strategic plans also include goals to help you achieve and determine if you have achieved your vision.

SO if you want to take your student organization where it hasn't been before and develop and apply skills used in the engineering firms you work with now and in the future, **READ ON**. The following handbook will walk you through a number of activities to get you, *and your group*, thinking critically about your organization and the endless possibilities to have an impact. The handbook was created to provide more information than needed, so take what works for you and your group and happy planning!

## THE STRATEGIC PLANNING PROCESS

1. **Conduct an environmental scan.** Review your organization's strengths and weaknesses. Reflect on the community and broader environment in which your organization operates to identify the opportunities and threats that it faces. Determine the community's assets and needs, specifically those of current/potential populations that you'll try to reach.
2. **Identify key issues, questions, and choices to be addressed.** Specify "strategic issues" that your organization should address and set priorities in terms of time or importance. Strategic issues emerge from the data and environmental scan.
3. **Define or review the organization's values, community vision, and mission.** Reach consensus on why the organization exists, what goals or outcomes it seeks to achieve, what it stands for, and whom it serves. Begin your strategic planning by agreeing on the following:
  - **Organizational core values or operating principles** – those beliefs/principles that guide the organization - these are shared, strongly held, and not easily changed.
  - **Community Vision** – the vision for your community - an image of what it would be like if your values were shared and practiced by everyone.
  - **Mission** – the stated purpose for your organization's existence; the contribution it promises to make to help accomplish the community vision.
4. **Transform the vision and mission into a series of key goals for your organization**
5. **Agree upon key strategies to address strategic issues and reach goals.** The emphasis should be on broad strategies, including current/new collaborative approaches that are related to specific goal(s). The process requires that you look at where the organization is now, where its vision and goals indicate it wants to be, and identify strategies to get there. Specific criteria for evaluating and choosing among strategies should be agreed upon, such as the following:
  - **Value and Appropriateness** – Is the strategy consistent with your organization's mission, values, operating principles, and agreed-upon goals?
  - **Feasibility** – Is the strategy practical given current personnel, financial resources and capacity?
  - **Acceptability** – Is the strategy acceptable to your stakeholders?
  - **Cost-benefit** – Is the strategy likely to lead to benefits that justify time, costs and other resources?
6. **Create an annual action plan that addresses goals and specifies objectives/work plan.** Once long-term elements of your strategic plan have been developed, create a specific work plan for implementation. Its strategies should reflect current organizational/environmental conditions. Objectives should be measurable and time-based. Under these or other agreed-upon criteria, strategies can be evaluated, prioritized and chosen.
7. **Finalize a written strategic plan that summarizes your decisions.** Be sure to include the outputs of each major step.
8. **Build in procedures for monitoring and modifying strategies.** Monitor the progress towards goals, objectives and strategies and revise your plan based on progress made, obstacles encountered and the changing environment. Acknowledge and take advantage of unexpected changes, such as more sympathetic elected/appointed officials, economic improvements, and changes in funder priorities or the priority population.

Adapted from Mosaica, 2001. Accessed February 21, 2012 at [http://siteresources.worldbank.org/INTAFRREGTOPEIA/Resources/mosaica\\_10\\_steps.pdf](http://siteresources.worldbank.org/INTAFRREGTOPEIA/Resources/mosaica_10_steps.pdf)

# Written Plan

*How will you remember if you don't write it down?*

*How will you know your impact if you don't write it down?*

1. How will you include your members in the analysis, planning, and goal setting?
2. How will you record your analysis, plan, and goals?
3. How are members able to access your work?
4. How will you solicit feedback from your members?
5. What is your timeline for completion of the plan?
6. When will you reference the plan throughout the semester to monitor progress, remember the vision, and adjust the plan?
7. When will you evaluate the year?

# SWOT ANALYSIS

## Strengths Weaknesses Opportunities Threats Environmental Scanning

Adopted from UWM Student Union, Student Involvement, <https://uwm.edu/studentinvolvement/>

SWOT stands for **strengths, weaknesses, opportunities and threats**. A SWOT analysis identifies strengths and weaknesses within your organization, and outside opportunities and threats. The most important parts of a SWOT analysis specify the ideas or actions that correspond to the elements you identify. By using the results of the analysis to improve the situation of your organization, you can reduce the likelihood of developments that negatively impact your group. After all, the main focus should be on helping your members and organization thrive, right?

Take some time with your executive board and/or general membership to evaluate your organization using the SWOT analysis method. Then develop a plan complete with action steps on how your organization will address the strengths, weakness, opportunities, and threats that you have identified.

### Strengths

Strengths are internal characteristics of your organization that place you at an advantage over other. For example, your organization has memorable programs and high name recognition on campus. When determining strengths of your group, consider these questions:

- What advantages does our organization have?
- What do we do better than anyone else?
- What do other organizations, students, faculty/staff, or community members see as our strengths?
- What resources can we access? What connections or networks can we take advantage of?
- What achievements are we most proud of?

Strengths	Ideas for building upon these strengths

## Weaknesses

Weaknesses are internal characteristics that place your organization at a disadvantage. For example, why are the members of another organization participating more than members in your organization? To determine your organization's weaknesses, ask yourselves:

- What could we improve?
- What should we avoid?
- What are other organizations, students, faculty/staff, or community members likely to see as our weaknesses?
- Where do we have fewer resources than other organizations?
- Are we completely confident in our member development, skills, and training? If not, where are the weakest?

Weaknesses	Ideas for minimizing or repairing weaknesses

## Opportunities

Opportunities are external factors that your organization can take advantage of in growing and developing your group. Maybe your members can think of a unique recruiting or fundraising idea that no other organization on campus has thought of yet. The answers to these questions will help you to brainstorm opportunities and future successful programs/tactics/projects that will help your organization shine!

- What good opportunities can you spot?
- What interesting trends are you aware of?
- Do you have a network of strategic contacts and resources to help you, or offer good advice?
- Are any other organizations failing to do something important? If so, can you take advantage of their mistakes?
- Is there a need at the university or in the surrounding community that no one is filling?
- How can you turn your strengths into opportunities?

<b>Opportunities</b>	<b>Ideas for investigating or taking advantage of opportunities</b>

**Threats**

Threats are elements in the environment around you (for example, at the university) that can cause trouble or barriers for your organization. Take a look at other organizations, current events, and the changing climate for possible threats to your group.

- What obstacles do you face?
- What are other organizations doing?
- Could any of your weaknesses seriously threaten your organization?
- Is the demand for your organization changing?

<b>Threats</b>	<b>Ideas for minimizing or overcoming threats</b>



# SWOT ANALYSIS

## At-a-Glance

	Helpful	Harmful
Internal	Strengths	Weaknesses
External	Opportunities	Threats

# Values, Mission, Vision

Please reference the *Values, Mission, Vision Handbook* if your organization needs to create these.

**Values:** An organization's principles or standards for behavior and performance; the judgment of what is important to the organization

**Identify your organization's *Values*:**

**Mission:** A clear, powerful, broad statement that explains the purpose of the organization, its values, services, and unique attributes

**Identify your organization's *Mission Statement*:**

**Vision:** A clear and succinct description of what an organization should look like after it successfully implements its strategies and achieves its full potential

**Identify your organization's *Vision Statement*:**

## Incoming Officers - "Goals, Dreams, & Priorities"

Things We Would Like  
To Accomplish

Barriers / Limitations

Resources

Unknown Questions

Why We Want This

Things We Would Like To Accomplish	Barriers / Limitations	Resources	Unknown Questions	Why We Want This

# 365 Action Plan Strategic Goal Setting

**Group Name:**  
**Created:** [date]  
**Latest Review:** [date]

Developing sound goals is critical to managing your own and your group’s performance. A 365 Action Plan is a comprehensive plan spanning 365 days of the year. Complete the 365 Action Plan with your student group officer team to establish group goals. Create an action plan to accomplish the stated goals including a timeline to completion. This document should be reviewed twice a semester with officers as well as twice per year with the general membership of the student group. The plan should be shared with general membership at least once a semester to assure they are supporting the group’s goals. The plan is to be created and reviewed in conjunction with the student group mission, purpose, and values.

*\* Included is an overview of SMART Goals.*

GOAL	OFFICER RESPONSIBLE [Name and position]	ACTION PLAN FOR COMPLETION	PROGRESS (Include date of review)	FINAL REVIEW (Completion date/Transition Plan)
<i>Example: Recruit 10 new members in fall semester to sustain student group potential (Completion Date: December 10)</i>	<i>Anna: Recruitment Officer</i>	<ol style="list-style-type: none"> <li>1. <i>Promote student group in Minnesota Daily, at the SUA Activities Fair, and Paint the Bridge.</i></li> <li>2. <i>Members reach out to friends for personal invitations.</i></li> <li>3. <i>Hold open house event for potential new members to learn about our group.</i></li> <li>4. <i>Invite potential new members to weekly group meeting.</i></li> </ol>	<p><i>Sept. 12: Attended SUA Activities Fair and met 13 new people who were interested.</i></p> <p><i>Oct. 5: 5 new members attended weekly officer meeting</i></p> <p><i>Oct. 20: Held Open House event and 15 new people came</i></p>	<i>Nov. 10: COMPLETE Officially have 10 new members who are regularly attending meetings and events. Five of them serve on planning committees.</i>

**Officer comments** (Related to stated goals and progress updates, in general)

**Advisor Comments** (if applicable)

# Writing S.M.A.R.T. Goals

Developing sound goals is critical to managing your own and your employees' performance. Each year you will ask your employees to set goals for the upcoming year/evaluation period. When you ask your employees to write their goals, teach them to create S.M.A.R.T. goals that support your own goals for the same period.

A S.M.A.R.T. goal is defined as one that is specific, measurable, achievable, results-focused, and time-bound. Below is a definition of each of the S.M.A.R.T. goal criteria.

**Specific:** Goals should be simplistically written and clearly define what you are going to do.

Specific is the What, Why, and How of the S.M.A.R.T. model.

**Example:** By August 1, 2009, implement a new performance management system for Classified Staff, A& P Faculty, and University Staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and develop their careers.

**Explanation of Example:**

“Implement a new performance management system for Classified Staff, A& P Faculty, and University Staff” = what

“using clearly defined processes and guidelines” = how

“so employees and managers can competently evaluate performance and develop their careers = why

**Measurable:** Goals should be measurable so that you have tangible evidence that you have accomplished the goal. Usually, the entire goal statement is a measure for the project, but there are usually several short-term or smaller measurements built into the goal.

**Example:** By August 1, 2009, implement a new performance management system for Classified Staff, A& P Faculty, and University Staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and develop their careers.

**Explanation of Example:**

The essential metric is whether or not the system is operational by August 1<sup>st</sup>.

**Achievable:** Goals should be achievable; they should stretch you slightly so you feel challenged, but defined well enough so that you can achieve them. You must possess the appropriate knowledge, skills, and abilities needed to achieve the goal.

You can meet most any goal when you plan your steps wisely and establish a timeframe that allows you to carry out those steps. As you carry out the steps, you can achieve goals that may have seemed impossible when you started. On the other hand, if a goal is impossible to achieve, you may not even try to accomplish it. Achievable goals motivate employees. Impossible goals demotivate them.

**Example:** By August 1, 2009, implement a new performance management system for Classified Staff, A& P Faculty, and University Staff using clearly defined

processes and guidelines so employees and managers can more competently evaluate performance and develop their careers.

**Explanation of Example:**

In order for you to reach this goal, you must have a skill set, in this case in the area of performance management, that allows you to understand the nature of the goal, and the goal must present a large enough challenge for you to remain interested in and committed to accomplishing it.

**Results-focused:** Goals should measure outcomes, not activities.

**Example:** By August 1, 2009, implement a new performance management system for Classified Staff, A& P Faculty, and University Staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and develop their careers.

**Explanation of Example:**

The result of this goal is a process that allows employees and managers to more competently evaluate performance and develop their careers, not the individual activities and actions that occur in order to make the goal a reality.

**Time-bound:** Goals should be linked to a timeframe that creates a practical sense of urgency, or results in tension between the current reality and the vision of the goal. Without such tension, the goal is unlikely to produce a relevant outcome.

**Example:** By August 1, 2009, implement a new performance management system for Classified Staff, A& P Faculty, and University Staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and develop their careers.

**Explanation of Example:**

August 1, 2009 provides you with a time-bound deadline.

The concept of writing S.M.A.R.T. goals is very important for accomplishing individual goals, which in turn are linked to department, division, and University goals. It is also critical for ensuring good communication between employees and supervisors so there are no surprises during annual performance evaluations.

The following questionnaire will assist you in creating S.M.A.R.T. goals. Begin by writing your goal as clearly and concisely as possible. Then answer the related questions. Conclude by revising your goal, in the space allotted.

Should you have any questions or require assistance, please contact UHR, Employee Development.

## S.M.A.R.T. Goal Questionnaire

Goal:

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1. Specific. What will the goal accomplish? How and why will it be accomplished?

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2. Measurable. How will you measure whether or not the goal has been reached (list at least two indicators)?

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3. Achievable. Is it possible? Have others done it successfully? Do you have the necessary knowledge, skills, abilities, and resources to accomplish the goal? Will meeting the goal challenge you without defeating you?

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4. Results-focused. What is the reason, purpose, or benefit of accomplishing the goal? What is the result (not activities leading up to the result) of the goal?

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5. Time-bound. What is the established completion date and does that completion date create a practical sense of urgency?

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Revised Goal:

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# Yearly Organizational Evaluation

Goal	Accomplishments	Barriers/Limitations to Completion	Resources	Work Left to Do



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