

# IR 101: The Strategic Planning and Management of Institutional Research

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# Institution's Strategic Planning and Strategic Management Processes

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The letters 'IIR' are rendered in a large, white, sans-serif font, positioned centrally over the lower half of the image. The 'I' is a simple vertical bar, while the 'R' is a stylized, bold letter. The background is a photograph of a brick building with two prominent towers and arched windows, set against a clear blue sky. The building's facade is made of reddish-brown bricks with white mortar lines. The towers are tall and narrow, with arched openings near the top. The central part of the building features a series of arches supported by columns. The sky is a uniform, clear blue. In the top right corner, there are some dark green leaves from a tree, partially obscuring the sky.

# IR

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Strategic Planning

Management



For whom do these approaches work?  
For Individuals... Or Groups!




Who doesn't need more...

**staff**  
**money**  
**something**

A clear blue sky with green and yellow trees at the bottom and sides.

**Capitalize on your  
strengths and state  
your best case for  
greater support.**



**Strategic planning  
and management are  
all about resource  
allocation.**

# Strategic

Planning

**Figuring out  
what to do**

Management

**Getting  
it done**





# Strategic Planning

**MISSION**

What we do

**VALUES**

What we aspire  
towards

**STRATEGIES**

How we  
do it

# MISSION

What we do:

State your core  
business.  
Simply.

Core business

# MISSION

**What we do:**

**Create all  
accountability statistics  
and provide decision support  
for the institution using  
information system  
data and surveys.**

**Core business**

# VISION

What we aspire towards:

Tightly worded  
and brief.

Mostly actions  
described.

Concrete physical actions,  
not adjectives

# VISION

What we aspire towards:

**Be consulted by leadership  
across the institution  
as the preferred  
resource for  
data and analysis**

**Concrete physical actions,  
not adjectives**

# STRATEGIES

How we do it:

Multiple  
considerations  
when developing  
strategies...

# STRATEGIES

How we do it:

Developed considering:

**Who are we?**

**Where are we?**

**What do we value?**

# STRATEGIES

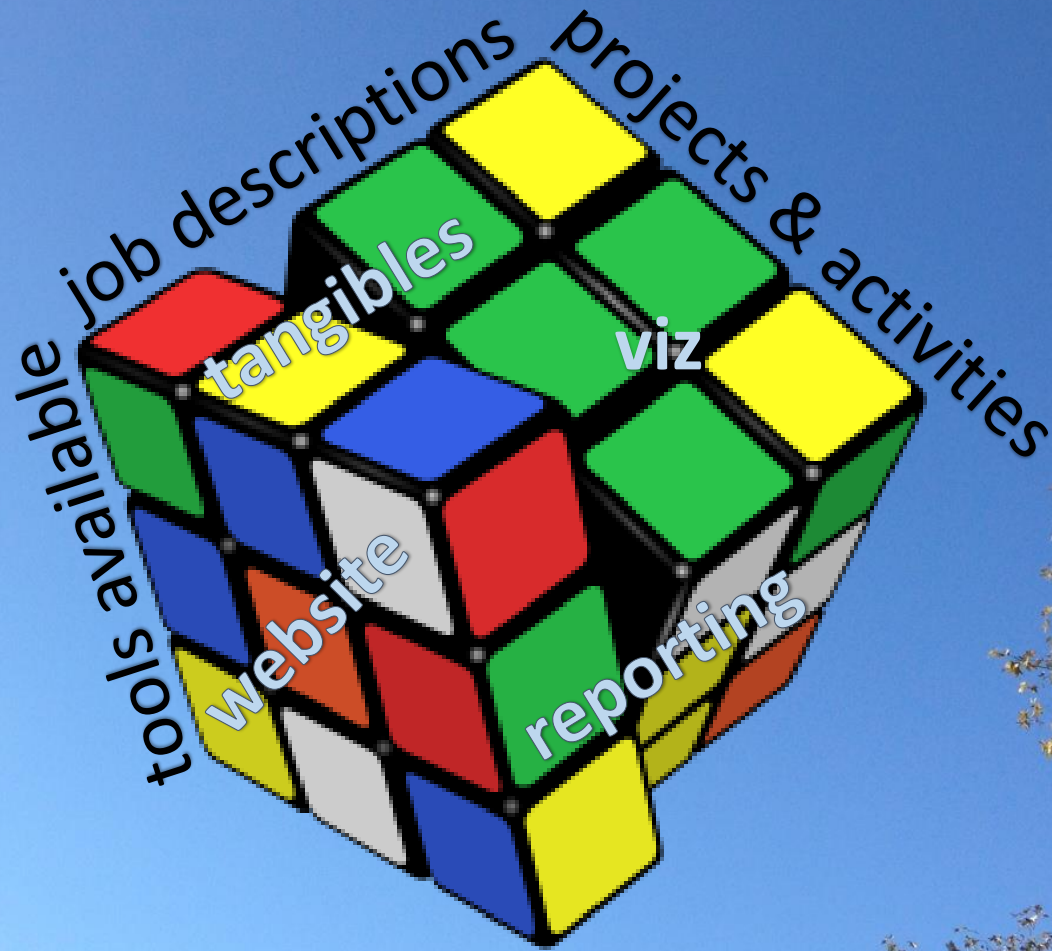
Who are we?

## INTERNAL ANALYSIS

- Job descriptions (roles to be fulfilled)
- The work that must be done (projects and activities)
- Tools available (systems, software, methods)
- Output (reporting, viz, website, tangibles)

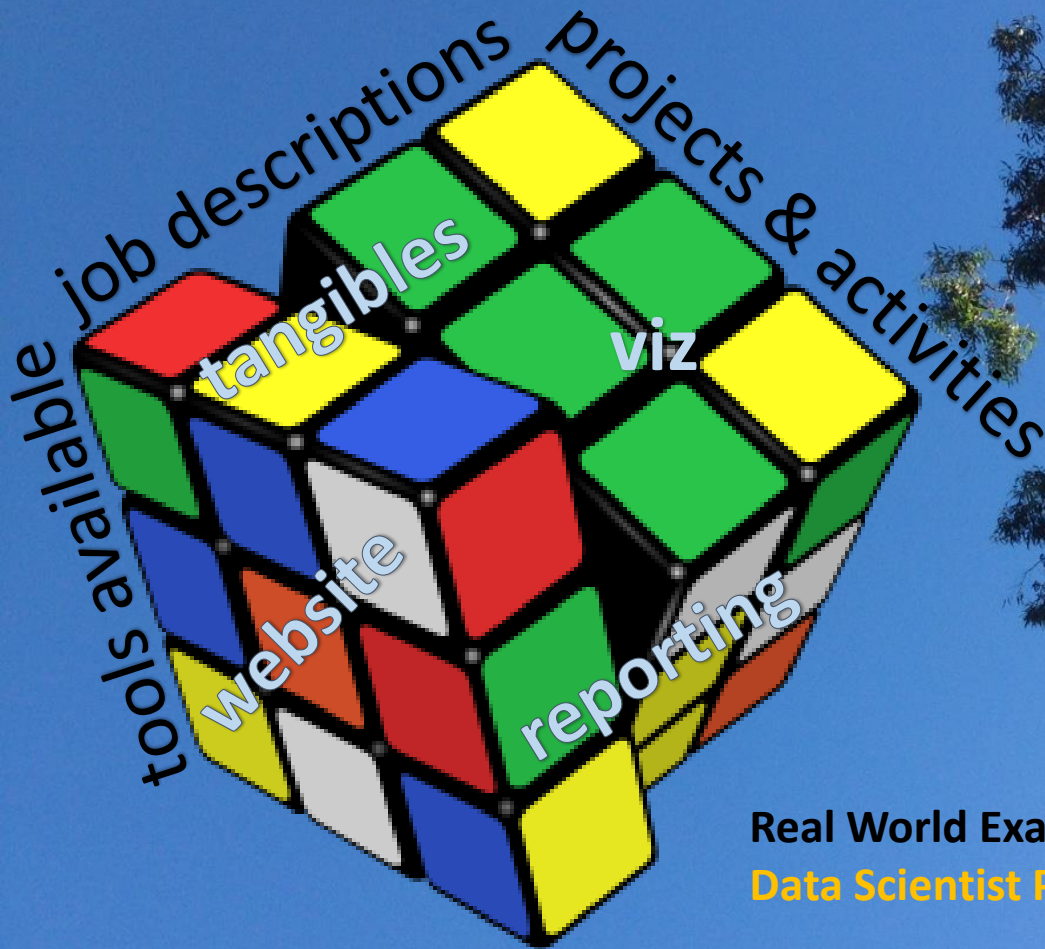


# INTERNAL ANALYSIS CUBE



Each component is a dimension,  
with the outputs being shown  
on the surface.

# INTERNAL ANALYSIS CUBE



Real World Example:  
Data Scientist Position

# STRATEGIES

Where are we?

## SWOT ANALYSIS

- Strengths
- Weaknesses
- Opportunities
- Threats

# SWOT Walk Through

	<b>S</b>	<b>W</b>	
Data		Inexperience	
Resources		Lack of documentation	
	<b>O</b>	<b>T</b>	
Dashboard Technology		Staff Turnover	

# STRATEGIES

What do we value?

Takes the form of:

- Values
- Standards
- Behaviors

# VALUES

We demand that  
our effort be...

- Accurate
- Responsive
- Timely
- Sustainable
- Insightful



# VALUES

Create explicit statements, such as:

“Every function is documented so that another staff member can undertake it in an emergency.”



# VALUES

Create explicit statements, such as:

“Email requests are provided a time estimate of completion within two hours of receipt.”





Develop a memorialization  
of your mission, vision, and values.

Keep it simple so you can  
immediately remember all of it.



Consider who is involved in its  
development.

Give it a rough childhood.



# Strategic Management

**ALIGN**

Time, money, effort

**LEARN**

Define measures  
(see: priorities, values, etc.),  
collect data, assess performance

**CHANGE**

Introduce more  
change

# Action prompts further design...



## **Review:**

- Process
- Planning Documents
- Performance (KPI Data)

# When?

**Align with individual performance review,  
with institutional budget process,  
and with calendar of deliverables  
to create and to provide evidence.**

# What?

**Consider your results:**

**Internal: what worked, what is changing,  
what can change, what it cost;**

**External: Scan of success, impressions  
formed, and new requests.**



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