IR 101:
The Strategic Planning and Management of Institutional Research

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Institution's Strategic Planning and Strategic Management Processes

I R
Strategic Planning
Management

For whom do these approaches work?

For Individuals… Or Groups!

Who doesn't need more…

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?

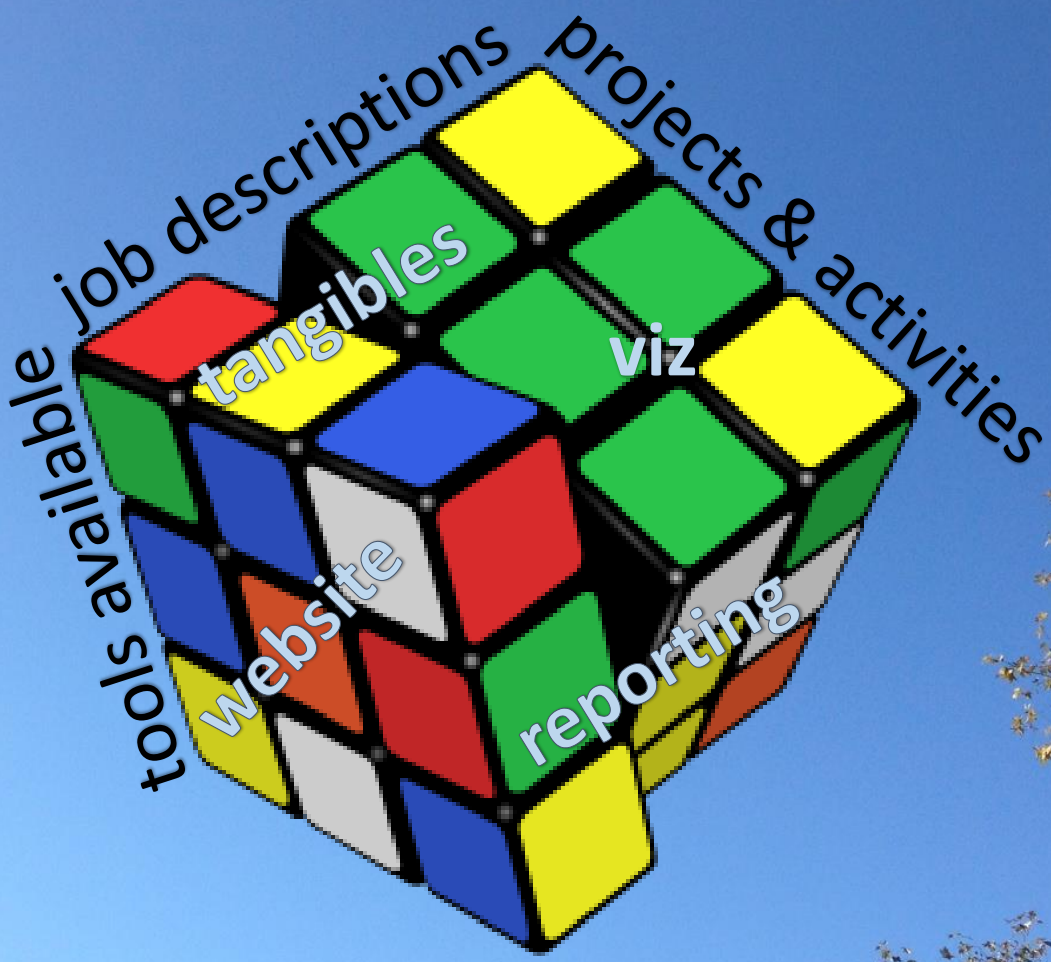
STRATEGIES

Who are we?

INTERNAL ANALYSIS

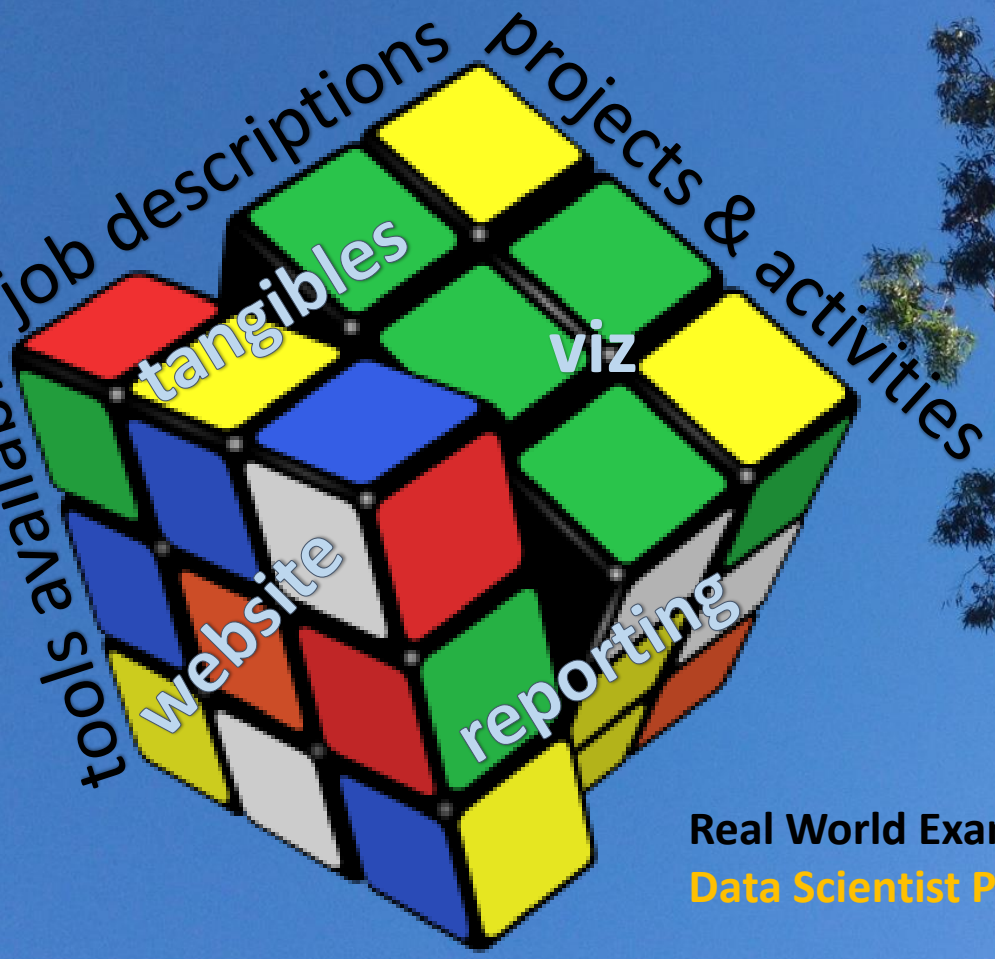
- Job descriptions (roles to be fulfilled)
- The work that must be done (projects and activities)
- Tools available (systems, software, methods)
- Output (reporting, viz, website, tangibles)

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

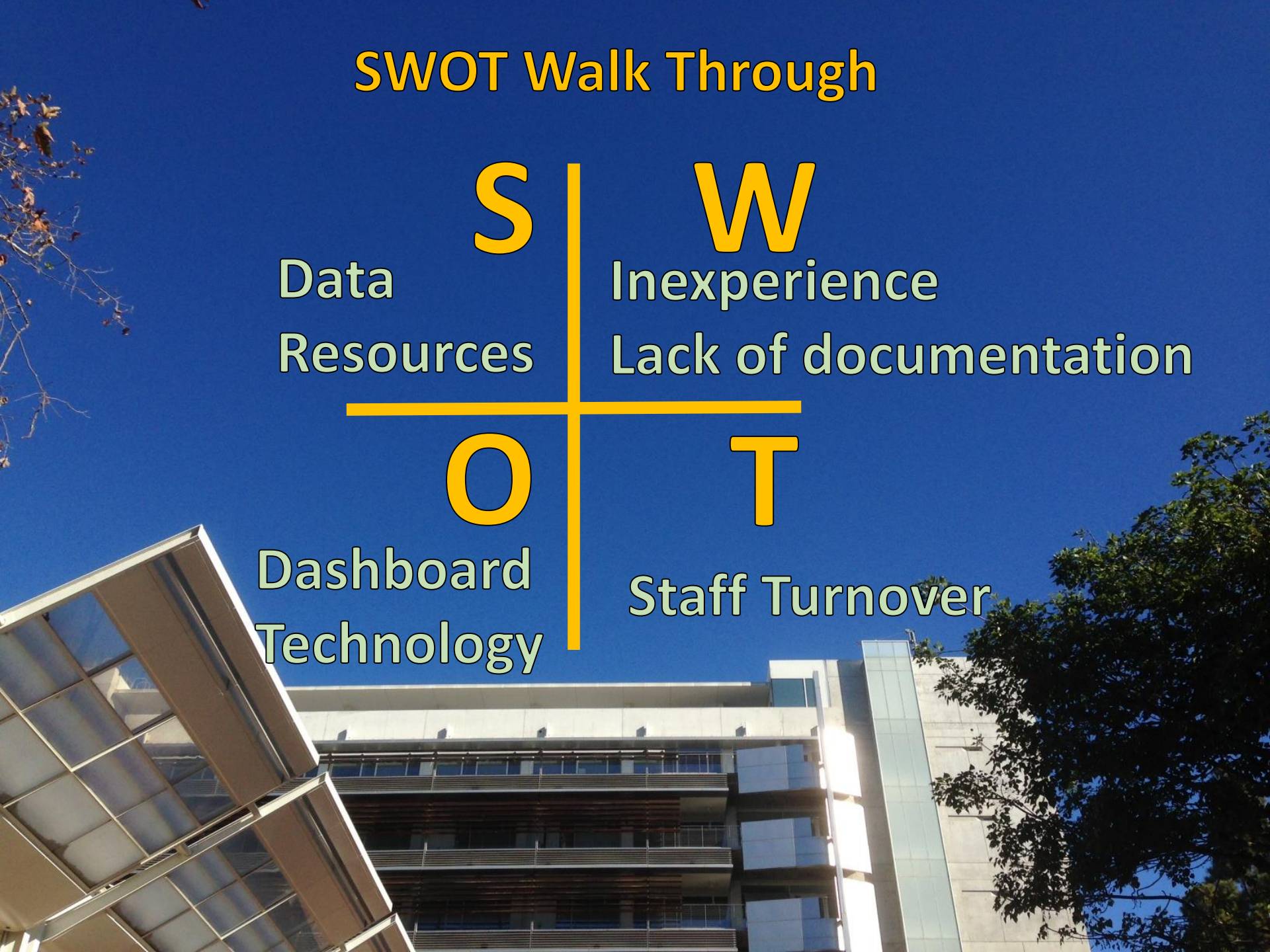
STRATEGIES

Where are we?

SWOT ANALYSIS

- Strengths
- Weaknesses
- Opportunities
- Threats

SWOT Walk Through



STRATEGIES

What do we value?

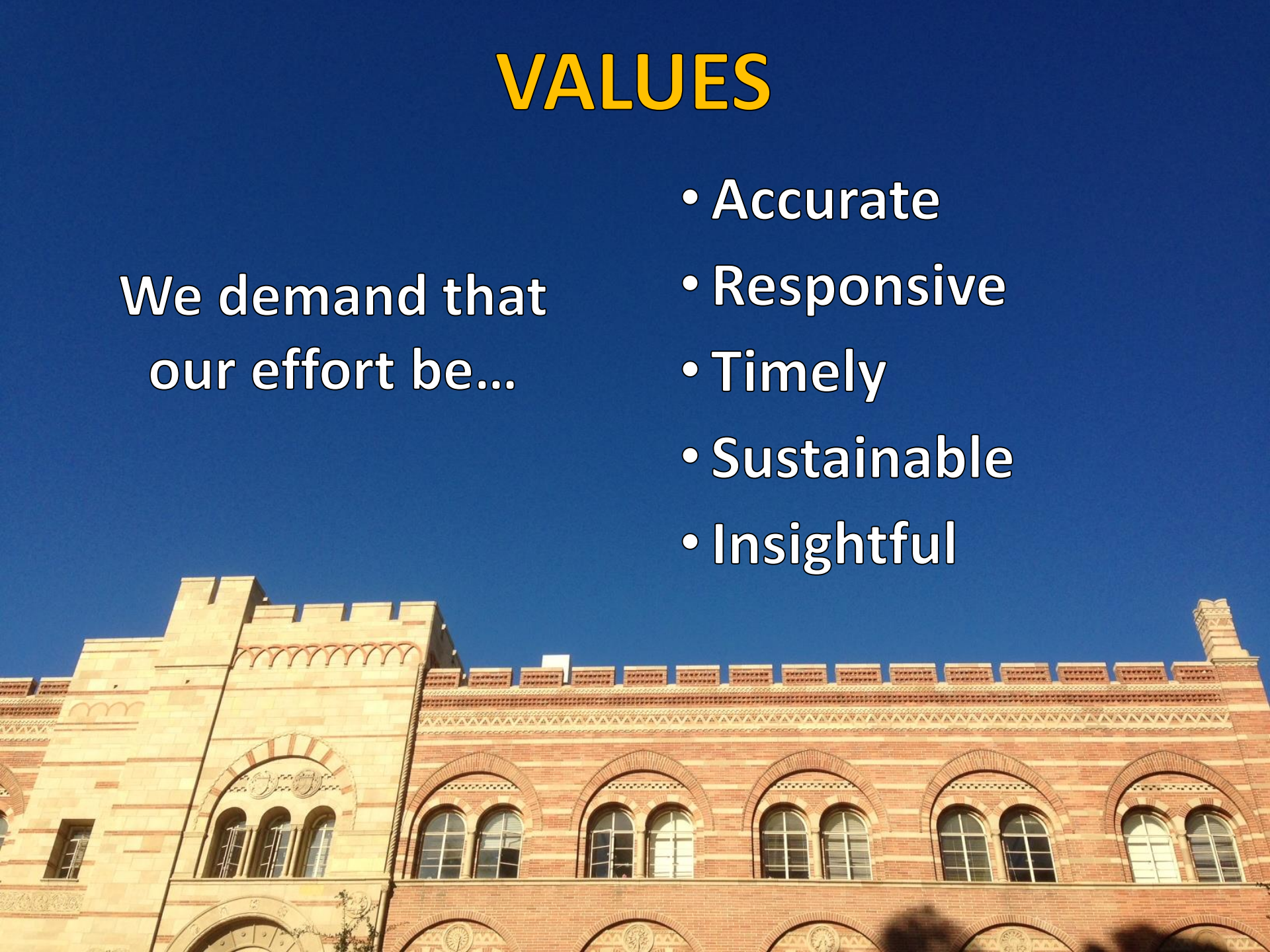
Takes the form of:

- 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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