

David W. Miles



Trusteeship readers doubtless understand the importance of developing an effective strategic plan for their institutions. Even in the best of times, a clear focus is required to prevent urgent day-to-day issues from distracting the enterprise from longterm strategic priorities. Without a strategic plan, supported by key constituents, moving your institution forward becomes a losing battle.

The Iowa Board of Regents, which governs three universities and two special schools, adopted a new six-year strategic plan in April 2010. It was the culmination of an 18-month effort that included: (1) an environmental scan of the role of higher education globally, nationally, and in our state, (2) two workshops to gather input from key constituencies, such as faculty members, students, elected state officials, and business leaders, among others, and (3) extensive dialogue among regents about the key strategic priorities for public higher education in Iowa. The plan we approved was short and to the point with eight overarching goals that addressed the most-important priorities for all the institutions—access, affordability, and student success; educational excellence and impact; and economic development and vitality.

Regents worked hard on developing the new plan and avoiding the challenges of the prior plan. A review of the 2004–09 plan revealed that it did not assign specific responsibility for completion of the objectives or have clear targets and measurements of the key goals. We resolved that our new plan would not suffer the same fate, but rather that it would remain a vital and living document with continuing impact on the decisions affecting our board and institutions.

We required that each goal in the plan be accompanied by an accountability measure and a performance target so the board could track success. Without those items in the prior plan, we couldn't ensure that the institution's strategic plans were connected to the board's priorities. The board had approved a set of common academic indicators for all institutions in February 2006, but not concurrently with

the adoption of the board's strategic plan.

At first, the requirement that the 2010–16 strategic plan would include measurable performance targets was met with concern, and our planning efforts slowed. The collective concern among everyone involved was palpable, as they were more accustomed to having the board defer such measures to office staff and the institutions. However, as it became clear that establishing the metrics and targets would be a collaborative process between the board and the institutions, the board was able to make significant progress.

Without question, the discussion of measurable targets changed the quality of our deliberations, which took on a new seriousness of purpose. Ambiguities or disagreements that had been glossed over were placed in stark relief. Participants felt a greater stake in the decisions we were making and became more engaged. What was realistically achievable given dwindling public resources was addressed openly.

The result, we believe, is a strategic plan of higher quality and greater impact than we would have had otherwise. While the board of regents' strategic plan includes a short list of top policy priorities for the system, each institution has since revised its own more detailed strategic plan to address specific goals—all in alignment with the board plan.

The first progress report on our new strategic plan will be presented in September. It is likely that we will have missed the mark on some of the performance metrics; some will be easier to achieve while others will be more difficult than we expected. The board understands that it will need to revisit some of the plan's objectives well before 2016. However, we are encouraged by the quality of thinking that went into this plan and the buy-in for its goals. It is clear that the plan is much stronger than if we had allowed the process to stop at the stage of setting directional aspirations.

When your board next addresses your strategic plan, we highly recommend that, working with your institutions, you involve the entire board in setting key priorities, developing performance metrics, and setting performance targets that will hold your board and institutions accountable.

About the Author:

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