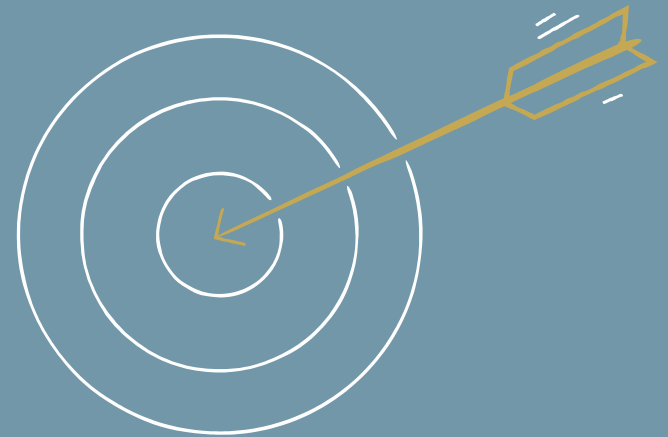


November 13, 2025

Staying Dynamic With Strategic Planning

John Graves, Internal Consultant



Office of Strategic Consulting
UNIVERSITY OF WISCONSIN-MADISON



Office of Strategic Consulting

UNIVERSITY OF WISCONSIN-MADISON

Who we are

We are an internal consulting office that works with academic and administrative units on campus to address organizational challenges, advance strategic priorities, and improve organizational effectiveness.

Our core services

- Strategic planning
- Process improvement
- Organization design and redesign
- Enhancing organizational culture and climate
- Project management and delivery
- Leadership coaching
- Organizational change management

strategicconsulting.wisc.edu

Agenda

1. Grounding in Core Concepts
2. Aligning Within the Organization
3. Exploring Strategy
4. Planning for Implementation
5. Making the Plan Dynamic
6. Questions & Answers

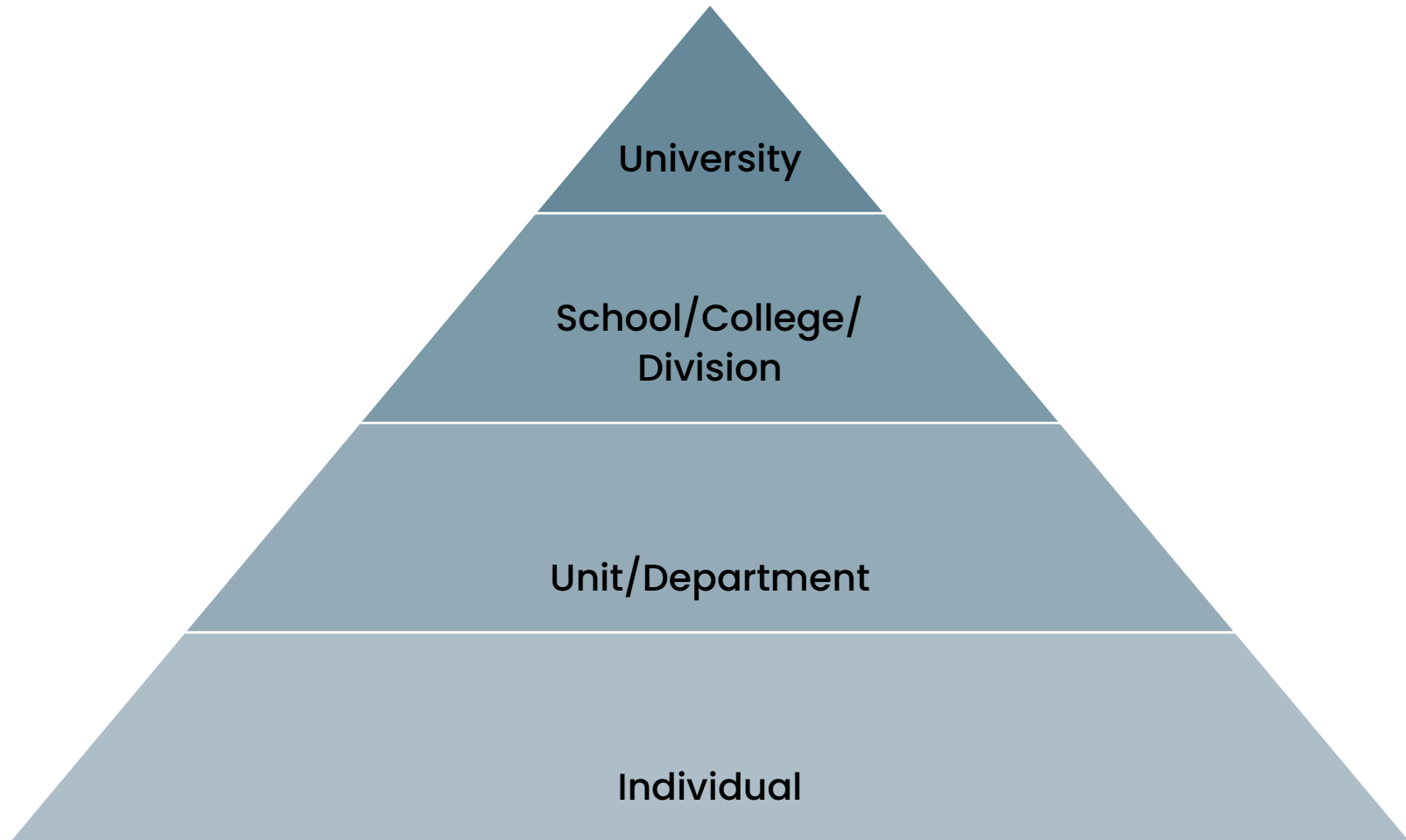
Grounding in Core Concepts

Core Concepts	Definition
Strategic Planning	A tool to define where your organization wants to go (your goals) and what actions you need to take to achieve those goals
Purpose	Purpose is the foundational reason an organization exists, its core intent and contribution to the people, communities, or systems it serves. It answers the question: “Why do we do what we do?”
Mission	A mission statement is a clear, concise declaration of an organization’s core purpose, why it exists, what it does, and who it serves.
Vision	A vision statement is a forward-looking declaration that describes what an organization ultimately aspires to become or achieve.
Core Values	Core values are the fundamental beliefs and guiding principles that shape how an organization behaves, makes decisions, and interacts with others.
Strategic Priorities	Strategic priorities are the key focus areas an organization chooses to advance to fulfill its mission and move toward its vision.
Initiatives	Initiatives are specific programs, projects, or actions launched to advance an organization’s strategic priorities.

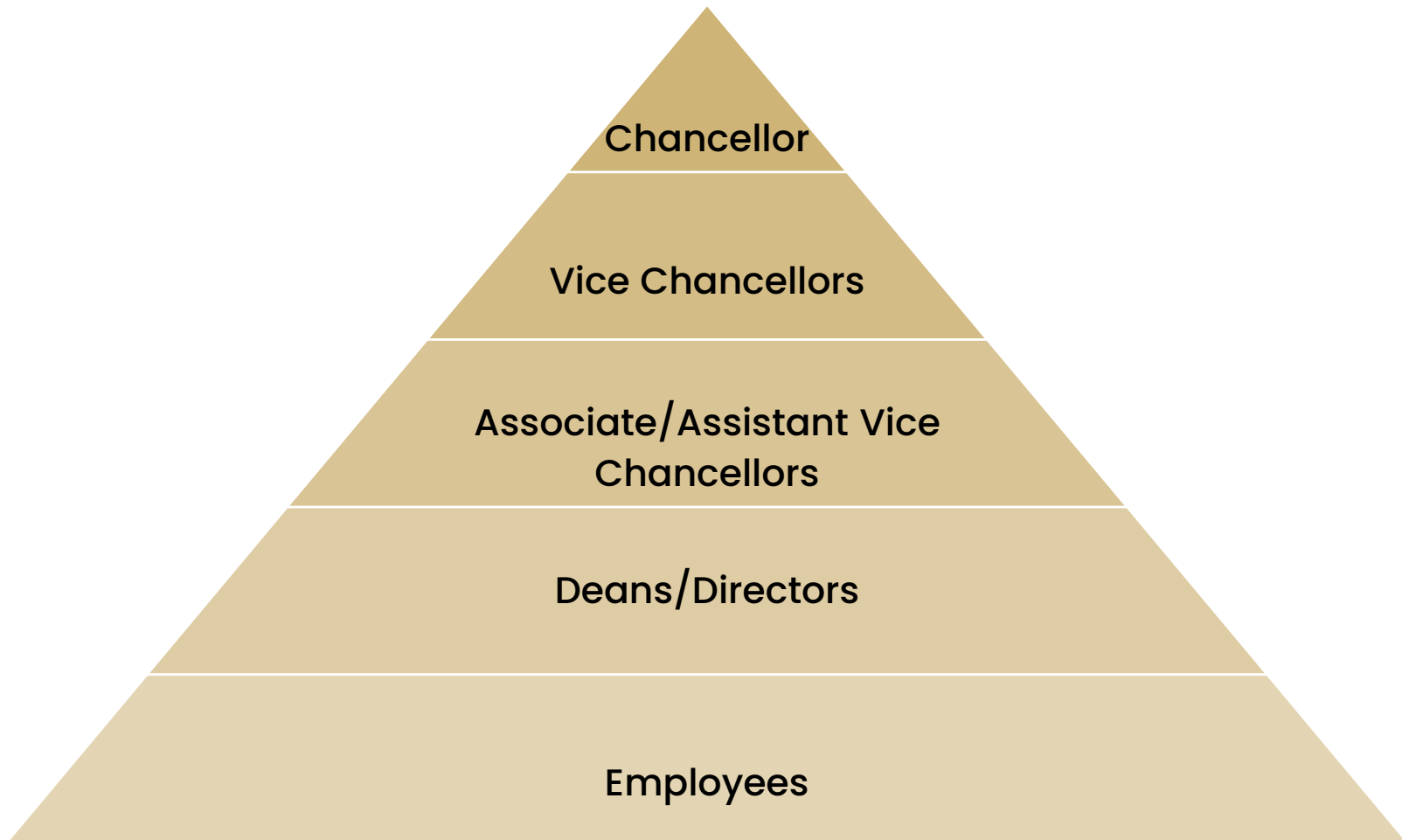
Grounding in Core Concepts Cont.

Core Concepts	Definition
Key Performance Indicators (KPIs)	KPIs , or Key Performance Indicators , are measurable values that help organizations track progress toward specific goals. They serve as vital signposts to evaluate success, identify areas for improvement, and guide strategic decision-making.
Milestones	Milestones are key markers that signify progress toward a goal or the completion of a major phase in a project or strategic plan. They help teams stay aligned, track achievements, and maintain momentum.

Alignment Within the Organization



Alignment Within the Organization



Strategic Planning: Opportunities and Obstacles

Positives

- Clear direction and vision
- Improved resource allocation
- Enhanced accountability and transparency
- Adaptability to change
- Stakeholder engagement

Challenges

- Cultural resistance to change
- Rapidly changing environment
- Limited resources
- Misalignment across units

Challenges to Action

Challenges

- Cultural resistance to change
- Rapidly changing environment
- Limited resources
- Misalignment across units

Potential Solutions

- Co-create the plan with faculty, staff, and students to build ownership.
- Build a living strategic plan that's reviewed and updated annually.
- Seek external partnerships and grants to supplement funding.
- Develop a shared strategic vision with clear institutional priorities.

Exploring Strategy



2025-? STRATEGIC PLAN: Center for Collaborative Learning & Innovation (CCLI)

PURPOSE

To empower educators, staff, and students to co-create inclusive, innovative, and sustainable learning environments through strategic collaboration, reflective practice, and capacity-building initiatives.

VISION

CCLI is shaping a university culture where collaboration, equity, and innovation are practiced daily empowering teams to lead change, strengthen learning, and grow together.

MISSON

We advance inclusive, innovative learning by helping teams and educators build sustainable strategies, reflective practices, and collaborative solutions.

CORE VALUES

Inclusion - We honor diverse perspectives and design for belonging.

Collaboration - We believe in the power of shared leadership and co-creation.

Curiosity - We approach challenges with inquiry, reflection, and openness to change.

Integrity - We act with transparency, respect, and accountability.

Innovation - We embrace experimentation and learning from failure.

Sustainability - We prioritize long-term impact over short-term fixes

STRATEGIC PRIORITIES

Teaching Excellence	Collaborative Research	Recruiting the Next Generation	Team Culture	Continuous Improvement	Professional Development
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INITIATIVES

Strategic Priority	Initiatives	Milestones & Time Frame	Lead / Involved
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Strategic Priority	Initiatives	Milestones & Time Frame	Lead / Involved
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Exploring Strategy

- **Step 1:** Each person will read the CCLI scenario to understand the center’s purpose, vision, and values.
- **Step 2:** Participants will divide into six teams, each representing one strategic priority area.
- **Step 3:** Each group will receive a themed “bucket” representing one area of strategic focus (e.g., Teaching Excellence, Team Culture).
- **Step 4:** Teams will brainstorm and propose **two initiatives** that align with CCLI’s mission and strategic direction.
- **Step 5:** After 10 minutes, each group will briefly report out:
 - The two initiatives they selected
 - Why those initiatives best support CCLI’s goals
- **Step 6:** All initiatives will be gathered and added to a shared document to help shape CCLI’s strategic plan.

Planning for Implementation

INITIATIVES

Strategic Priority	Initiatives	Milestones & Time Frame	Lead / Involved
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Strategic Priority	Initiatives	Milestones & Time Frame	Lead / Involved
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Strategic Priority	Initiatives	Milestones & Time Frame	Lead / Involved
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Making the Plan Dynamic



Questions



Recap

1. **Strategic Planning** – Alignment within the organization
2. **Alignment Within the Organization** – Information flow
3. **Mission** – Purpose of the organization
4. **Vision** – North Star
5. **Values** – DNA of the organization
6. **Strategic Directions** – Vision guiding
7. **Substantial Actions** – Work
8. **Implementation** – What/Who/When

Thank You!

Office Hours

All consultations are conducted virtually and at no cost.

Choose a primary area of interest from those listed on the form.

One of our consultants will then follow up with you within one week to schedule a time to meet. It's that easy!

<https://strategicconsulting.wisc.edu/organizational-office-hours/>

Presenter Contact

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