STRATEGIC PRIORITIES TOOLKIT

This toolkit is for colleges, schools, and departments – to guide the development of strategic priorities and supporting action plans.

Why strategic priorities matter

Strategic priorities are key areas of focus over a set timeframe. They align effort, guide decision-making, and drive progress toward what matters most. Groups typically identify 3-5 strategic priorities, with a timeframe of 3-5 years.

USC's strategic priorities

The University of South Carolina has three near-term priorities:

- Reimagining the Student Experience and Advancing Post-Graduate Success

- Increasing Research and Scholarship to Drive Community and Economic Impact

- Transforming Service Delivery and Promoting Operational Excellence

Important considerations

When developing strategic priorities for a unit, it's essential to consider key elements that inform future direction: the **university's priorities**, **stakeholder needs**, **unit strengths**, and **relevant external factors**. Understanding these considerations will help a unit focus on a small number of well-informed, future-oriented priorities.

Setting this up for success

- **Involve colleagues with different perspectives (senior and emerging leaders, newcomers, cross-functional voices, etc.) in developing the strategic priorities and supporting actions.** This will elevate great ideas and establish common understanding, shared ownership, and alignment.

- **Make time for this, but keep it efficient and focused.** Offices with fewer than 10 people should plan for a half day to do this well. Larger groups may need a full day or two half-day sessions.

- **Do some advance work so your session runs smoothly.** Communicate the purpose and expected outcomes. Share reference materials in advance, and schedule sessions early.

Inside is everything participants need for a productive session to develop strategic priorities:

AGENDA Page 2

An easy-to-follow agenda – just copy it and you're ready

WORKSHEET Page 3

A note-taking worksheet to be used by participants – to seed discussion

USC PRIORITIES Page 4

The university mission, vision, and priorities – for important context

Also inside is guidance for the person who's leading this effort:

FACILITATION TIPS Pages 5-8

Step by step: What to do before, during, and after the session

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AGENDA

I. Set the stage

- Outline the overall purpose of this work – and our session outputs
- Go through the agenda to see how our work will unfold
- Set context by reviewing USC's priorities and unit-specific information

> **Full participation:** Each perspective adds value
>
> **To the point:** Keep comments to a max of 2 min.
>
> **Limit technology distractions:** Text, email, phone checks, etc.

II. Take stock of the current situation

Look at the current situation from three angles:

1. Our stakeholders

- Who are our primary stakeholders?
- Among them, who benefits the most from our work?
- What do they rely on us for?

2. Ourselves

- What do we do especially well?
- What resources (partnerships, infrastructure, expertise, etc.) do we under-utilize?
- What are we doing that's delivered by others?

3. Our environment

- What important external factors will have the greatest impact on us over the next 5 years? These can be outside USC or within USC, but external to your unit.

> **For all three segments**: Start by using the worksheet to capture individual notes, then follow with discussion and consensus.

III. Identify our priorities

- Use insights from the preceding segment to answer this key question:

  - What priorities rise to the top tier for the next 5 years?

- Group similar proposed priorities to see where there's common ground
- Discuss the groupings to ensure understanding and fine-tune the emerging priorities
- Reach consensus on a set of strategic priorities for the future (3-5 years)

> Write each of your proposed strategic priorities on a separate sticky note.

IV. Develop an action plan

- Document potential actions aimed at achieving each strategic priority
- In subgroups: Group like actions, then refine and narrow in on a recommended action set
- Look for keystone actions that advance two or more priorities
- Refine the overall action set to include leads for specific actions, time frames (start, complete), etc.

SESSION WORKSHEET

1. OUR STAKEHOLDERS

Who are our primary stakeholders?
Among them, who benefits the most from our work?
What do they rely on us for?

2. OURSELVES

What do we do especially well?
What resources (partnerships, infrastructure, expertise, etc.) are we under-utilizing?
What are we doing that's delivered by others?

3. OUR ENVIRONMENT

What important external factors will have the greatest impact on us over the next 5 years?

4. OUR PRIORITIES

What priorities rise to the top tier for the next 5 years? Consider the likely impact on key stakeholders.

Write a separate priority on each sticky note.

UNIVERSITY OF
South Carolina

The university mission, vision, and strategic priorities provide important context for all planning within colleges, schools and departments. Include the following in the reference materials sent to participants in advance of your planning sessions.


MISSION STATEMENT

The mission of the University of South Carolina Columbia is to educate students through outstanding teaching and to provide research, scholarship, and service that drives community and economic impact for the benefit of the state, nation, and world.

VISION STATEMENT

- Our Students Change the World for the Better – Using their knowledge to build a better future.

- Our Faculty and Staff are Innovators – Bringing ideas and solutions that advance the state, nation, and world.

- Our Institution is Committed to Operational Excellence – Redesigning operations and enhancing service delivery for faculty, staff, students, and the community.

STRATEGIC PRIORITIES

- Reimagining the Student Experience and Advancing Post-Graduate Success

- Increasing Research and Scholarship to Drive Community and Economic Impact

- Transforming Service Delivery and Promoting Operational Excellence
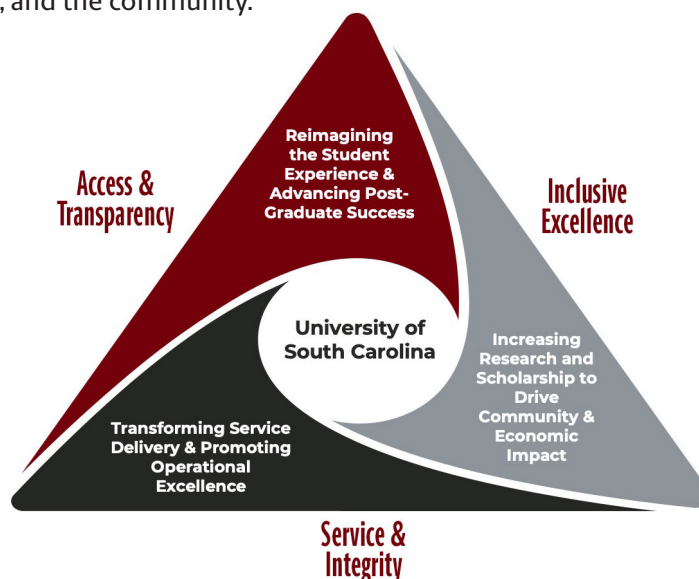
The agenda, worksheet, and USC strategic priorities (previous three pages) are for participants. The tips below guide the facilitator on what to do <u>before</u>, <u>during</u>, and <u>after</u> the session.

BEFORE THE SESSION

1. Ensure that you and your unit leader(s) are clear on the intended outputs – and why they're so important.

- The agenda (page 2) is designed to yield two outputs: a set of **strategic priorities** and a supporting **action plan**.

- Strategic priorities are essential because they align effort and ensure everyone is working toward shared goals. They provide focus, guide decision-making, and help teams use their time and resources wisely

2. Decide on a time span that defines how long the strategic priorities will guide your unit's work.

- Five years is a common and effective timeframe, but three or four years can work as well, especially to encourage nearer-term action.

3. Identify participants for the session.

4. Gather key reference materials.

- University-level: USC mission, vision, strategic priorities (see page 4)

- College/School/Division: relevant plans and data

- Department: goals, current efforts, context

5. Determine the session schedule.

- Decide on one or two sessions.

- Schedule the session(s).

- Finalize the agenda. Use (or adapt) the agenda on page 2.

Number of participants:		
< 10 people	**10-15 people**	**> 15 people**
Recommended:		
1 half-day session	**1 full-day session or 2 half-days**	**2 half-day sessions**

6. Send materials to all participants before the session.

- Calendar invite, reference materials, agenda(s)

- Communicate the purpose, outputs, and overall importance of this work and their involvement.

DURING THE SESSION

As the session unfolds:
If unrelated or tangential points come up during the session, note them on a **"parking lot"** flipchart sheet posted on the wall. This lets people be heard while keeping the session on track.

I. Set the stage (about 20 minutes for this opening segment)

- Begin by having your unit leader describe the overall purpose, the session outputs, and the importance of everyone's input.

- After the unit leader sets the context, review the agenda so participants know what to expect. Consider noting the ground rules at the top right of the agenda.

- Provide quiet time for all participants to review key reference material provided in advance (USC's strategic priorities, college/school/division priorities, other relevant context and data).

II. Take stock of the current situation (about 1.5 hours for all three parts)

1. Our stakeholders

- Have participants work individually/silently for 5 minutes. Prompt them to take notes in box 1 of the session worksheet.

- Invite participants to share. Capture key points on a flipchart.

- Prompt the group to identify 2–4 key stakeholders from their list. To help them narrow, ask: Who benefits most from your work?

2. Ourselves

- Repeat the process: Have participants work individually for 5 minutes, writing notes in worksheet box 2.

- Prompt the group share input, and note key points on a flipchart.

- Ask the group to distinguish core strengths from work better done elsewhere: What are we doing that others already cover? Where could we scale back to focus on higher priorities?

- Have the group identify key themes from the discussion.

The **worksheet** focuses thinking and sets the stage for productive discussion.

3. Our environment

- Have participants silently write notes in box 3 of the worksheet.

- Hear from the group, and record key points on a flipchart.

- Identify themes that are emerging from all the points

- Suggested: For 10 or more, form subgroups of ~5 to discuss, then share key points and scribe on flipchart.

III. Identify our priorities (about 1 hour)

- Urge participants be mindful of key points from the previous segment when writing potential strategic priorities. Invite them to get up and review any of the flipchart notes.

- Prompt participants to work individually for 10-15 minutes, responding to the box 4 prompt and writing their proposed strategic priorities on sticky notes – one priority per note.

- Have participants go to the wall, place their sticky notes on the flipcharts, then review and group similar strategic priorities by repositioning related notes. Allow time for reading and reflection.

- Ask participants to keep grouping until all ideas are sorted. Then have them write a title for each strategic-priority group. It may take time, but the discussion is valuable.

- Guide a review of each priority grouping. Prompt discussion, process any needed revisions, and achieve a common understanding. Avoid the temptation to spend time looking for the "perfect" wording.

IV. Develop an action plan (about 1.5 hours)

- For larger groups (10+), consider a second session for action planning. This allows time to refine the priorities and ensures fresh energy for the next phase.

- Write each newly established strategic priority at the top of a flipchart sheet, and post these to the wall.

- Have participants start individually, using sticky notes to write as many action ideas as they'd like – writing one action per note – aimed at advancing any of the priorities. Then have them place their notes on the appropriate priority sheets so that all the actions are grouped by strategic priority.

- Divide into subgroups of at least three per priority flipchart. Instruct them to:

  1. Review all proposed actions to see what people have in mind for this priority.

  2. Use the input to develop a "top 5" (max) recommended action list.

  3. For these actions, indicate a recommended sequence and start/complete timing.

  4. Document your subgroup's output on the flipchart; be ready to present.

- Open the floor to subgroup report-outs. Facilitate discussion and refinement.

- After hearing from all the subgroups, ask if there are keystone actions that advance two or more priorities. If yes, be sure to highlight these on the flipchart. They might warrant emphasis in the action plan.

- Note: The above work might need to be done in two rounds, if the number of participants doesn't allow for at least three people per each priority flipchart.

- Depending on the remaining amount of session time and your own preferences: Fine-tune the action set with group input to identify potential leads for specific actions, to clarify time frames (start, complete), etc.

The **impact/effort grid** is often useful in evaluating potential actions
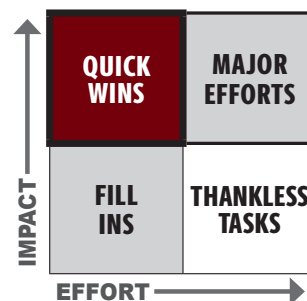
AFTER THE SESSION(S)

If the group meets <u>twice</u>, do this after the <u>first</u> session:

- Compile an organized summary of key points from the session, and send it to all participants. (Include raw notes if helpful, but prioritize a well-organized synthesis.)

- Review progress with leadership to ensure alignment and begin building support.

In all cases – whether the group meets once or twice – do the following as an essential follow-up:

- Document the strategic priorities and supporting action plan.

- Review with leadership to confirm priorities and resources, identify SMART (specific, measurable, achievable, relevant, and time-bound) goals, review the action plan, and strengthen support.

- Circulate to participants.

- Ensure that action items in the action plan have leads who will coordinate, keep things moving, engage people as needed, and remain mindful of any timeline targets.

- Going forward, ensure the priorities are visible and regularly referenced. For example, include them on meeting agendas, highlight them in updates, use them to guide project decisions.

- Periodically review progress on the strategic priorities – consider discussing as a group.

Most important of all: Put the strategic priorities to work

Developing strategic priorities is only the beginning – the real impact comes from <u>using</u> them.

- Your strategic priorities should actively guide decisions, align effort, shape communications, and help teams stay focused on what matters most.

- Your action plan translates your strategic priorities into focused, achievable actions that drive progress.

- Enhance the implementation of your plan with training in effective communication and working with a team, available through the Office of Organizational and Professional Development.