

**Strategy Manager: Enhancing the Implementation of Strategic
Planning by Effectively Organizing and Managing Strategic Initiatives**

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Abstract

Anecdotal data suggest that Strategic Plans often become “coffee table books” or “dust collectors” on the shelf. The literature on strategic planning in higher education cites two consistent gaps identified with this phenomenon. One is managing implementation and follow-through; the other is establishing a clear line of sight so that frontline staff can connect their job with the strategic plan. The Florida State University Office of Human Resources has developed and implemented an online tool called “Strategy Manager” to address the identified gaps stated above and to successfully align our HR strategic assessment, planning, and budgeting with the FSU Division of Finance and Administration’s goals. Strategy Manager has enhanced the overall implementation of HR strategic plans, which supports it as a best practice.

Introduction

Strategic Planning is no easy task. One of the challenges in strategic planning is integrating and aligning planning, assessment, and budget throughout the organization. The Florida State University's Office of Finance and Administration (F&A) recognizes the challenge of establishing a clear line of sight for employees, aligning and focusing the functions and resources of its departments and offices with the overall strategic goals of F&A and assessing the progress they are making. The Office of Human Resources (HR) has become a resource for F&A in tackling these challenges by providing tools that help link assessment, planning, and budget within our organization. One tool created by HR that has facilitated this best practice is an on line tool to manage strategic initiatives, goals and objectives within the context of assessment, planning, and budget.

Statement of the Problem

Strategic Planning is a best practice in virtually all business and operational areas of a higher education institution. In fact, the practice of strategic planning in higher education institutions has become a requirement in many cases, linked directly to institutional effectiveness and quality enhancement plans for accreditation [i.e. Southern Association of Colleges and Schools (SACS), North Central Association of Colleges and Schools (NCA)], state governance boards, and state legislative bodies. For example, a strategic plan represents a strong symbol of SACS expectations for the coherence and integration of assessment, planning, and budget. Creating strategic plans and publishing goals and objectives is one thing; implementing and managing the alignment and focus of those goals and objectives is another.

Anecdotal data suggest that in many cases strategic plans become “coffee table books” or “dust collectors” on the shelf. The literature on strategic planning in higher education cites two consistent gaps identified with this phenomenon. One is managing implementation and follow-through on action plans, the other is establishing a clear line of sight so that frontline staff can connect their job with the strategic plan.

These gaps were problematic in FSU’s Office of Human Resources as well. One issue was a need for real time accessibility by the employee to view current updated unit goals. Another issue was the general organization of strategic activities within the department. This included important information that showed how the staff members’ goals and objectives, HR units’ goals and objectives, and HR Strategic initiatives were linked and aligned to F & A’s Strategic Plan. There was confusion at times, especially for frontline level staff in making sure they were doing what was expected and how they aligned with the department’s goals. The primary organization of strategic planning activities in HR, which included keeping track of progress and results of initial strategic initiatives, departmental objectives, and the roles and responsibilities of individuals involved in the activities, was done using loose leaf notebooks, word tables, and various other forms. If employees did not keep up with changes, or managers adopted new strategies for the departmental action plans and were not able to update all HR employees’ materials, there would be misunderstandings that mitigated the follow-through on action plans, muddied any clear expectation given to the employee, and decreased the overall effectiveness of the strategic plan.

To address the need for employee accessibility to current strategic plan expectations, establish a clear line of sight to HR and Division goals, and enhance follow-

through of action plans associated with the strategic plan, the Florida State University Office of Human Resources has developed and implemented an online tool called “Strategy Manager”. The tool hierarchically organizes strategic goals and objectives up and down the organization in a user friendly way. It allows individual staff members to have a clear line of sight as to how their jobs relate to the strategic plan. The tool documents strategic goals and objectives associated with a position so that transition from one individual to another in that position is made easier. Finally, the tool is used to link initiatives to budget allocation, a best practice for any organization.

Design

To deal with the issues of accessibility, clear line of sight, and tracking of strategic goals and objectives within the HR department criteria had to be established. The tool had to be built around the following criteria:

- Show a clear line of sight from employee objectives, to unit goals and objectives, to HR Strategic Initiatives, to their linkage to F&A Strategic Imperatives
- Be easy for managers to update individual and unit goals
- Be simple enough so that employees could click on their name and see what was expected of them and their department
- Able to track changes and results of annual goals and objectives
- Able to prioritize and organize annual budget request
- Leverage technology to eliminate cumbersome paper forms, notebooks, and complex matrices
- Utilize a template that was technically transferable and easy to maintain

The HR IT and Communication team was challenged with creating an effective user-friendly tool that fit the criteria. Step one was to design an on line architecture using existing resources and applications that could be easily transferable. A hierarchical framework was conceptualized as a “hook and ladder” structure. The “hook and ladder” concept envisioned employees’ objectives hooked to the unit goals that were hooked to HR strategic initiative. In a conceptual sense, the employee could visualize how their work laddered all the way to F&A’s strategic goals. Next, using existing software and database resources, construction of the framework began.

The Strategy Manager is a web-based, database driven application. This means it exists as a web application that can be viewed within a web browser, and it is connected to a database providing current and instantaneous feedback. It was developed using Adobe Coldfusion, a web application server and coding language, to provide dynamic interaction between the user and the strategic data.

The design of the application was developed with three main components. The first component consists of a list of personnel that are allowed access to the Strategy Manager and an interface for managing those personnel. The second component is the actual data management piece, which is the interface that allows users to add, edit, or archive their various strategic items. Through the data management component, managers select which level they wish to edit and are then able to navigate through the hierarchy to make changes at the correct point in the “ladder”. At each level, the manager is presented with a simple form interface which allows him to add or edit all the necessary information to describe the particular objective or initiative. The third component consists of several predetermined database queries and charts that allow the employees or

interested parties to browse and view all of the various objectives for the department. These objectives can be viewed based on criteria pertinent to the department, such as initiative, section, and individuals. To maintain an appropriate level of security, access to the application is limited to computers at the department's physical location, and the management component is further limited by user password.

Implementation

After the initial framework was complete, Strategy Manager was piloted by all units in HR. The response from directors, managers, and staff was positive, specifically with its simplicity to the user and the ability to see expectations, results and alignment of all strategic activity within the department. All staff members have immediate access to their specific goals and objectives and can see how they affect other goals and objectives.

The ability of Strategy Manager to print outlined and linked objectives along with progress updates and results aimed at a specific HR goal made it extremely useful for budget requests. After being presented at the F&A Division level, an enterprise version is now in the works. Further development of Strategy Manager will include a Microsoft Excel spreadsheet for budget requests supported by links to the data management component.

Benefits

The expected benefits of Strategy Manager have been realized, but its full potential has not. For now, its benefits as a systematic approach to helping employees, managers, and directors fully engage in the strategic plan process are showing exceptional promise. The ability to access and organize goals and objectives information, see alignment, and use the information to help make resources allocation is easily

apparent to those who have used it. In HR, employee access to their goals and objectives has reduced performance expectation issues, managers are able to better articulate their overall unit goals, and directors are able to keep track of the progress made in their areas. The transparency and strategic organization has helped F&A senior leadership prioritize direction and allocations for HR.

Other F&A departments are now using Strategy Manager. In addition, an enterprise version is being developed for any FSU department that wishes to use the tool. The next step will be to fully integrate Strategy Manager into a departmental budget request template that will give decision makers informed connections between the budget requests and F&A's strategic goals, thus more informed resource allocation decisions.