



# The Importance of Strategic Planning in Research Administration

By *Ezrah Medina and Javeria Kazi*

Strategic plans have the ability to transform an organization and tend to be associated with senior leadership and institution-wide initiatives. Emphasis is often placed on external metrics that will garner positive attention and bring additional funding, such as institutional rankings, new programs, and revitalized or new infrastructure. While these endeavors indisputably enhance an institution's overall stature, they can leave the respective research administration communities struggling to manage the new reality they create. As research administrators, we are deeply immersed in the day-to-day operations, and this aspect can be overlooked or taken for granted when implementing large-scale change. But what if we adopted strategic planning at the department level? What if the focus was placed on coordinated efforts to maximize efficiencies and position your unit for success in the face of significant change? In our experience, that is exactly what is needed. When executed well, with commitment and intentionality, strategic planning can motivate your team, provide clear direction, create new pathways to leadership, and help you achieve goals previously thought to be unattainable. Though there is no 'one size fits all' approach to strategic planning, we have found that there are a few key ingredients to success: casting a vision, incorporating the team, and effectively operationalizing the plan.

The foundation for any strategic plan lies in a compelling vision. As a leader, your vision should be forward-thinking and aspirational, helping to paint a vivid picture of what your unit aspires to become in the future. Key elements of a vision statement include being clear and concise, providing inspiration, and aligning your vision with that of your institution. Much like research

administrators, vision statements set a positive tone and must be adaptable in order to sustain changes in executive leadership at any organization. A great vision statement evokes passion and a sense of purpose and belonging.

Strategic planning goes beyond casting a vision, however. As with any large project, involving key stakeholders is critical as it helps us gain diverse perspectives and insights. One of the many hidden benefits of involving your team in the strategic planning process from the onset is that you develop a shared vision and establish a committed group invested in its success. Collaboration is a key element of success in any endeavor and fostering such an environment can be challenging, especially when the office environment is no longer congruent with a cohabitated physical office space.

To overcome those challenges, start by creating an open and transparent culture where team members feel comfortable sharing ideas, concerns, and feedback. Include your entire team and do not limit involvement to senior leadership. "The more the merrier" applies to strategic planning, too! Involving the entire team can lay the foundational trust and transparency needed for the plan's implementation. If you are faced with engagement challenges, ask your team members questions and take the time to listen and understand their concerns. Active listening is cited as one of the most important factors in employee work engagement (Jonsdottir & Kristinsson, 2020). It can help you understand barriers that you may encounter along the way, and plan for them proactively. When your team feels valued, they will be more likely to invest their time and energy towards the initiatives in the plan and see them through to success.

After establishing a safe space for collaboration, start to realize the benefits by trusting your team's expertise and empowering them to take ownership of the plan. While the vision sets the overarching tone of the strategic plan and is crafted by leadership, a mission statement and values establish the purpose and ethical framework and should be developed by the team. Why does your team come to work every day? What drives and motivates them? And what values are most important to them in this line of work? When empowered to reflect on these questions and directly contribute, something transformative occurs allowing your team members to see themselves within the strategic plan, further increasing their investment.

In developing your unit's mission statement and values, consider utilizing group brainstorming sessions. Ask team members to reflect on what is important to them about their work, without limiting their responses to fit pre-established lists. Identify the goals of each working session upfront and provide various response modalities to the group; not everyone feels comfortable speaking up in a room full of their peers, especially if they are new. Consider using tools and technology to your advantage by establishing live surveys and feedback tools to aggregate responses. Most importantly, allow individuals to witness their contributions being acknowledged, received, and incorporated into the plan. Through these brainstorming sessions, you will help to bridge the gap between each individual contributor and the overarching vision.

With the vision, mission, and values established, the next component of strategic planning is identifying which projects and initiatives are needed to successfully realize the shared vision that's been created. This too should be collaborative, though it will require direct input and guidance from leadership. As leaders, you have institutional awareness and perspective that your team may not. Tap into that insight to identify projects that will position your unit for long-term success and ensure maximum benefit on effort contributed. Consider initiatives that other units have identified and find ways to collaborate. This will reduce the resource expenditure on your end, build stronger coalitions across your institution, and provide growth and leadership opportunities for your team members. As you do this, share these ideas with your team and provide several opportunities for them to identify important projects. Tease out the projects your team has worked on and how the individuals and the projects fit in with the direction your team is headed. By showcasing these efforts, leadership can gain buy-in and make the case that the strategic plan is

a formalized version of the great successes and plans your team is already working towards.

The last and most challenging part of strategic planning comes with implementation. To be executed successfully and in a way that enables sustainability, it requires both a great team and leadership that is committed to seeing it through. It can be tempting to take the lead on all of the projects and initiatives yourself, but as leaders, we must resist that urge and instead use this opportunity to build leaders amongst our team. The reason for this is multi-layered. First, by leading each initiative yourself, burnout will ensue on your part. Second, and more importantly, is that this will diminish the shared vision that was built and replace the culture of collaboration with one that leaves team members feeling undervalued, overlooked, and disengaged.

## “The foundation for any strategic plan lies in a compelling vision.”

During this phase, it's important to avoid losing momentum. As time goes by, the initial excitement will fade and daily responsibilities can start to take priority over the plan. Leadership will need to check in with team members, committees, and project leads responsible for implementing the plan. Reinforce the mission, vision, and values at team meetings, in 1-1's, and around the office as you see colleagues. Set expectations while also offering support and encouragement. Highlight successes whenever possible, and always be open to critical feedback. Continue publicly recognizing individual and team contributions, strengths, and accomplishments. Recognition breeds commitment. This reinforcement behavior demonstrates commitment on behalf of leadership and is your primary responsibility. It is incumbent upon you as the leader to track overall progress, recognize when things are going off-course, and have the humility and wherewithal to restructure priorities. Doing so will ensure that the vision remains attainable and that the plan doesn't become a shiny object without merit.

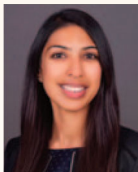
Strategic planning at the unit level is a practical approach that can bring about transformational results within a team, elevate morale and performance, establish a culture of collaboration, build leaders that embrace change, and empower individuals. We encourage you to consider this for your own team, no matter the size. By doing so, you might discover yourself at the forefront of driving change and ushering in a transformational era for your department. ■

### Reference

Jonsdottir I.J., & Kristinsson K. (2020). Supervisors' active-empathetic listening as an important Antecedent of work engagement. *International Journal of Environmental Research and Public Health*, 17(21), 7976. <https://doi.org/10.3390/ijerph17217976>



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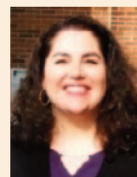
## Build Allies Not Adversaries: Repairing Relationships with Colleagues

By Anna Dampf

Typically, when we hear about relationship management in the context of research administration, the focus is usually on relationships with our PIs or our sponsors. Often, the relationships that can cause the most headaches or have the greatest impact on careers, both positively and negatively, are the relationships with fellow research administrators at our institutions. In a world where many of us have less face time with our colleagues and fewer in-person meetings, it is more important than ever to cultivate positive relationships with colleagues.

Conflicts are inevitable in any relationship, but being able to navigate and resolve those conflicts in a constructive and respectful manner is important for your institution but also for your career progression. Taking proactive steps to avoid common areas of conflict, build trust, and keep the line of communication open: set up meetings well before deadlines, openly discuss concerns, clearly outline expectations, make eye contact with your colleague during conversations, whether in person or on video, and respond to emails quickly.

If conflicts happen, it often works to address them head-on even though it may be uncomfortable. A simple approach, such as saying, "I know the last time we worked on XYZ there was some frustration. When you have time, I would love to meet and discuss what we could have done better so that we can both be more successful next time," goes a long way. And when you meet, genuinely listen, give others the benefit of the doubt, and, if necessary, apologize. Everyone wants to be treated with respect, and extending the olive branch could be exactly what is needed to repair the relationship. Every successful research administrator knows that good teamwork and collaboration make all the difference so build allies, not adversaries. ■



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