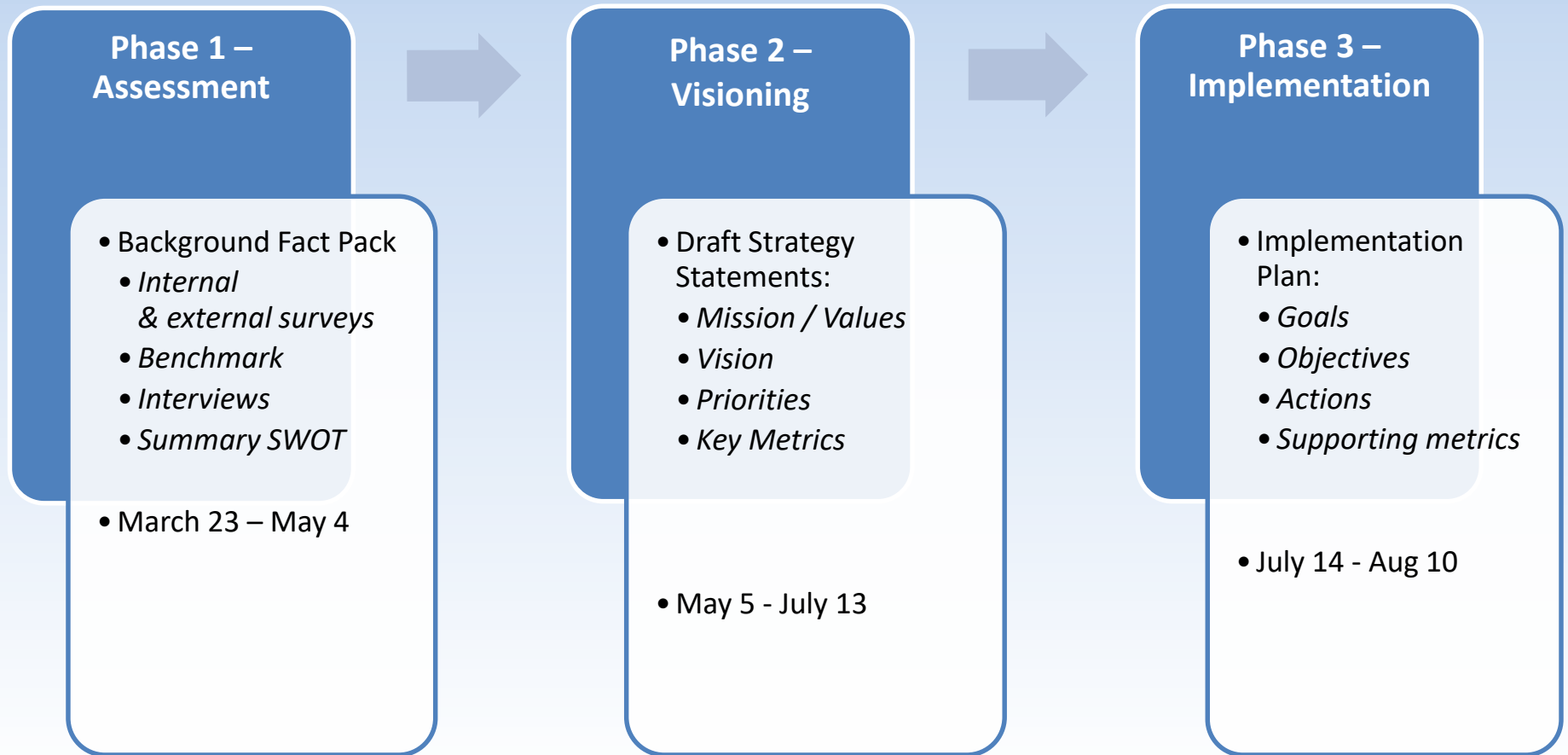


Case Study Example

Carolina Athletics Strategic Plan



The 3 phases of the strategy project



5 Month Project Roadmap

Phase I

Week 1 (3/19-3/23)

Review Strategic Planning Material

Week 2 (3/26-3/30)

- Retreat Prep by Task Force
- AD benchmark targets
- Finalize team charter

Week 3 (4/2-4/6)

- Research
- Internal Employee Survey

Week 4 (4/9-4/13)

- Analysis of survey results

Week 5 (4/16-4/20)

- Task Force Strategic Planning Retreat

Week 6 (4/23-4/27)

- External constituent survey
- Visit/contact ADs
- AD Key Findings

Week 7 (4/30-5/4)

- Findings and Recommendations
- Summarize corporate best practice strategy statements

Phase II

Week 8 (5/7-5/11)

- Break

Week 9 (5/14-5/18)

- Revise documents/conduct additional research

Week 10 (5/21-5/25)

- Craft strategy documents - mission, vision & priorities

Week 11 (5/28-6/1)

- Revise strategy statements based upon input

Week 12 (6/4-6/8)

- Systematically circulate and gain input

Week 13 (6/11-6/15)

- Systematically circulate and gain input

Week 14 (6/18-6/22)

- Develop comprehensive performance metrics & goals

Week 15 (6/25-6/29)

- Revise all documents based upon input

Week 16 (7/2-7/6)

- Break

Week 17 (7/9-7/13)

- Finalize prep for Advisory Committee meeting

Phase III

Week 18 (7/16-7/20)

- Conduct training in balance scorecard principles

Week 19 (7/23-7/27)

- Draw out lessons learned and
- Revise objectives, metrics and actions

Week 20 (7/30-8/3)

- Finalize balance scorecard and implementation plan

Week 21 (8/6-8/10)

- Prepare for final Advisory Committee meeting



Initial Survey led to Summary SWOT



Strategy Statement – Mission

Mission Statement

Statement which specifies a firm's purpose or "reason for being" and the primary objective toward which the firm's programs & plans should be aimed. It must be clear and understood.

**We educate and inspire
through athletics.**

Strategy Statement – Values

Values

It is what we believe in, our guiding principles,
and how we interact.

Responsibility

Do what is right.

Innovation

Find a better way.

Service

Put others first.

Excellence

Work hard. Play smart. Win together.

Strategy Statement – Vision

Vision Statement

Statement describing what the firm strives to be at some future time. It should be specific and motivating.

**We will lead in all that we do ...
Academics, Athletics &
Administration.**

Strategy Statement – Priorities

Priorities

What we need to do to live our mission and values
and to accomplish our vision.

Alignment

Align our operations to fulfill the mission of the university.

Academic Achievement

Achieve a top 3 academic finish in the conference and a top 10 finish nationally in each sport.

Athletic Performance

Perform to a top 3 athletic ranking in the conference and a top 10 ranking nationally in each sport.

Administrative Engagement

Engage internal and external constituents to relentlessly pursue the resources and administrative structures necessary for success.

Carolina Athletics Strategy Statements

Mission

We educate and inspire through athletics.

Values

Responsibility	Do what is right.
Innovation	Find a better way.
Service	Put others first.
Excellence	Work hard. Play smart. Win together.

Vision

We will lead in all that we do ...
Academics, Athletics &
Administration

Priorities

Alignment
Align our operations to fulfill the mission of the university.

Academic Achievement
Achieve a top 3 academic finish in the conference and a top 10 finish nationally in each sport.

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Achieve a top 3 athletic ranking in the conference and a top 10 ranking nationally in each sport.

Administrative Engagement
Engage internal and external constituents to relentlessly pursue the resources and administrative structures necessary for success.

Priority: Alignment

Align our operations to fulfill the mission of the University.

Objective 1: Define and respect the importance of athletics within public research universities.

- A. Work with university-appointed task forces to develop operational and growth strategies for the athletics program.
- B. Develop a culture that values the balance of athletics and academics as a vital part of the student-athlete experience.
- C. Develop a compliance culture to serve as a model for responsibility and integrity.
- D. Create the first multi-university coalition to monitor impact of athletics on a university.

Objective 2: Build stronger relationships within the university community.

- A. Launch campus-wide athletics/community partnership programs.
- B. Create a campaign that celebrates athletics contributions to university life.
- C. Operate in a transparent manner so that the university community is as informed as possible about decisions that are made within Carolina Athletics.

Objective 3: Actively shape the future of college athletics.

- A. Seek leadership roles on collegiate athletics committees (e.g., conference committees, NCAA task forces, NACDA and affiliate leadership organizations).
- B. Offer the Carolina perspective in multiple venues on a national basis.

Priority: Academic Achievement

Achieve a top 3 academic finish in the conference and a top 10 finish nationally in each sport.

Objective 4: Improve the academic profile of incoming student-athletes.

- A. Track and annually improve the academic profiles of incoming student-athletes.
- B. Aggressively recruit prospective student-athletes who exemplify and embrace the core values of Carolina Athletics.
- C. Recognize coaches for their recruiting classes that meet high standards for academic profiles.

Objective 5: Support student-athletes' academic goals, performance and their efforts to graduate.

- A. Facilitate and support the College of Arts & Sciences' efforts to offer an outstanding academic support system.
- B. Develop and implement a comprehensive feedback system for academic support.
- C. Monitor regularly the academic progress and graduation rates, giving increased attention to groups, teams and individuals that fall below established goals.
- D. Create a program to recruit former student-athletes who have exhausted their eligibility to complete their education.
- E. Recognize and celebrate individual and team academic achievement to all constituencies.

Objective 6: Develop student-athletes for a life of success beyond athletics.

- A. Enhance life skills programs.
- B. Utilize the Baddour Carolina Leadership Academy to identify leaders among student-athletes and to develop their leadership skills.
- C. Prepare student-athletes for careers after graduation.
- D. Measure impact of athletics in life.

Priority: Athletic Performance

Perform to a top 3 athletic ranking in the conference and a top 10 ranking nationally in each sport.

Objective 7: Attract, develop and retain the best coaches.

- A. Seek aggressively the coaches in the hiring process who exemplify and embrace the core values of Carolina Athletics.
- B. Embrace diversity in hiring practices.
- C. Develop a systematic approach to reward coaches for performance.
- D. Emphasize and support the importance of professional development and self-improvement.

Objective 8: Attract, develop and retain the best student-athletes to achieve their maximum potential.

- A. Develop the mindset that everything we do should enhance the student-athlete experience.
- B. Attract the best student-athletes.
- C. Develop a comprehensive student-athlete health and wellness program.
- D. Emphasize the importance of living the core values of Carolina Athletics.

Objective 9: Win championships.

- A. State an ultimate goal to win championships in every sport.

Priority: Administrative Engagement

Engage internal and external constituents to relentlessly pursue the resources and administrative structures necessary for success.

Objective 10: Create a culture that emphasizes strategic thinking, effective organizational structure and outstanding communications.

- A. Develop a comprehensive campaign to deliver the Strategic Plan, and to establish consistent strategic thinking at all levels.
- B. Reinforce the strategic plan through review and renewal.
- C. Define staff roles clearly for excellent staff interaction.
- D. Encourage open communication between all units and management levels.
- E. Encourage innovation by soliciting and celebrating new ideas at all levels and across business units.
- F. Establish a coordinated information-gathering effort to track progress.

Objective 11: Attract, develop and retain the best staff.

- A. Seek aggressively the staff members who exemplify and embrace the core values of Carolina Athletics.
- B. Embrace diversity in hiring practices.
- C. Emphasize and support the importance of professional development and self-improvement.
- D. Develop a systematic approach to reward staff for performance.

Priority: Administrative Engagement

Engage internal and external constituents to relentlessly pursue the resources and administrative structures necessary for success.

Objective 12: Identify, secure and allocate the resources needed to achieve at the highest level.

- A. Identify resources needed to achieve our vision through benchmarking analysis.
- B. Secure the resources identified to achieve our vision through accelerated fundraising and new revenue generation.
- C. Allocate and track the resources to ensure maximum achievement and performance.

Objective 13: Develop an operational approach that emphasizes connections with fans, donors and partners through outreach and collaboration.

- A. Provide great customer service based on inventive programming, continuous improvement and systematic feedback.
- B. Grow partner relationships to expand the reach and impact of Carolina Athletics.
- C. Become a data-based decision-making organization.

Objective 14: Tell the “Carolina Story” through innovative digital communications, aggressive promotions and proactive public relations.

- A. Share stories across multiple platforms of the impact Carolina Athletics has on the University and its community.
- B. Develop cutting-edge strategies to utilize digital, social and emerging media to inform, educate and engage all constituencies.
- C. Develop a common brand positioning platform for all external communications.

Communications Plan

Communication Goal

- Aggressively sell the Strategic Plan to all constituent groups in a very proactive manner

Constituent Groups

- Coaches
- Student-Athletes
- Athletics Staff
- Faculty
- University Community
- Letterwinners
- Supporters

Launch Timing

- September
 - Internal Sharing
- October
 - Public Launch
- Oct - Dec
 - Unit & Program Plans

Media

- Publications
- Website
- Video
- Signage
- Support Material
- Actionable Use

[Carolina Athletics' Strategic Plan](#)