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CHALLENGES AND STRATEGIES IN UNIVERSITY MANAGEMENT: A CASE STUDY BASED ON THE APPLICATION OF THE SWOT MATRIX AND BSC¹

DESAFIOS E ESTRATÉGIAS NA GESTÃO UNIVERSITÁRIA: UM ESTUDO DE CASO A PARTIR DA APLICAÇÃO DA MATRIZ SWOT E BSC

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ABSTRACT

This paper analyzes the challenges and strategies involved in managing public higher education institutions, based on a case study of an academic unit of a public university in Rio Grande do Norte. The research highlights the importance of strategic planning to align organizational actions with institutional objectives, ensuring efficiency, sustainability, and social impact. The SWOT matrix was used to map internal (strengths and weaknesses) and external (opportunities and threats) factors, and the Balanced Scorecard (BSC) was used to define indicators and goals aligned with financial perspectives, customers, internal processes, and learning and growth. The results point to the need for diversifying funding sources, strengthening student retention, continuing faculty development, and improving institutional communication. Thus, it is clear that the integration of SWOT analysis and the BSC offers an effective model for university management, promoting improvements in institutional demands, academic excellence, and societal growth.

Keywords: strategic planning, SWOT, BSC, university management, higher education.

RESUMO

O presente trabalho busca analisar os desafios e estratégias na gestão de instituições de ensino superior (IES) públicas, partir de um estudo de caso em

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uma unidade acadêmica de uma universidade pública localizada no Rio Grande do Norte. A pesquisa destaca a importância do planejamento estratégico para alinhar ações organizacionais aos objetivos institucionais, garantindo eficiência, sustentabilidade e impacto social. Foi empregado a matriz SWOT para mapear fatores internos (forças e fraquezas) e externos (oportunidades e ameaças) e o Balanced Scorecard (BSC) para definir indicadores e metas alinhados às perspectivas financeira, clientes, processos internos e aprendizado e crescimento. Os resultados apontam para a necessidade de diversificação de fontes de financiamento, fortalecimento da permanência estudantil, formação docente continuada e melhoria na comunicação institucional. Assim, percebe-se que a integração entre análise SWOT e BSC oferece um modelo eficaz para a gestão universitária, promovendo melhorias para as demandas institucionais, excelência acadêmica e crescimento regional.

Palavras-chave: planejamento estratégico, SWOT, BSC, gestão universitária, ensino superior.

INTRODUCTION

In both the global and national contexts, there is a need for efficient management practices aimed at ensuring greater competitiveness, effectiveness, and productivity. To achieve this, the set of organizational actions must be carried out with regard to various aspects: financial management, people management, and, above all, internal processes. Furthermore, such practices must be aligned with organizational objectives, since only in this way will the organization effectively apply its resources and achieve lasting results (Montenegro et al., 2021; Ribeiro, 2017).

In addition to this context, organizations must also face a scenario of constant economic, political, and technological change. This requires the adoption of formal strategies that allow the definition of clear objectives, the generation of alternatives aligned with opportunities and with the organizational mission and vision, as well as the monitoring and evaluation of the results obtained. Thus, this process of efficient management, which ensures growth and a prominent organizational position, is only possible through the adoption of



strategic planning (De Souza; Marinho; Sartori, 2022; Ojha; Patel; Sridharan, 2020; George; Walker; Monster, 2019).

This process is not exclusive to private companies. Public institutions also require a systematic formulation of their strategies and guidance for their managerial decisions, focused on achieving objectives. Therefore, its application in public management favors the optimization of resource use and the achievement of better results for the population, translated into improvements in the quality of services provided (Da Costa et al., 2022; Matias-Pereira, 2018; Silveira; Lunkes, 2018).

More specifically, public educational institutions face broader challenges regarding their strategic planning. This occurs because providing a quality service is not limited to offering education to all citizens. It is necessary to evaluate and create structural and pedagogical conditions that enable students to remain within the educational system and transform their realities, generating social and economic outcomes (De Sena, 2023; Abrucio, 2018).

Therefore, it is necessary to diagnose the context faced by the institution in order to assist in defining alternatives and strategic decisions. In addition, it is essential that actions and their results be monitored in order to manage performance effectively (Almeida; Baran; Santos, 2025; Freitas; Odelius, 2022). From this perspective, the present study aims to apply the SWOT Matrix to map the scenario faced by a public higher education institution located in the state of Rio Grande do Norte and, based on this, define performance measures through the Balanced Scorecard that help control strategic actions.



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THEORETICAL FRAMEWORK

Management in educational institutions

Educational institutions are structured as spaces of interaction among individuals, in which the manager plays a central role by hiring and coordinating professionals who promote knowledge generation and the training of professionals for the labor market (Tachizawa, 1999). In this context, management is understood as a set of practical actions that contribute to institutional development and the improvement of services provided to the target audience. When applied to the public sector, management must also include strategies aimed at generating social impacts, such as poverty reduction and educational improvement (De Moraes; Sano, 2023).

More specifically, the modern university has as its historical mission the theoretical and practical advancement of knowledge, the dissemination of fundamental knowledge, and the improvement of social conditions. These objectives shape the organizational structure of higher education institutions and demand increasingly complex management practices that interact with the external environment and require effective organizational strategies (Machado; Kalnin; Moraes, 2020).

Within the scope of public administration, internal control in universities has proven to be an essential tool for ensuring transparency, protecting public assets, and promoting efficiency in the execution of institutional goals (Soares; De Santana Pinho, 2022). This control is directly related to the qualification of public servants, a topic addressed in Decree No. 9,991/2019, which establishes guidelines for the development of competencies necessary for good performance in public administration, complemented by other decrees regulating the granting of incentives and development plans (Silva et al., 2021).



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Despite the growing demand for more strategic management, many managers still face difficulties in fully understanding their roles in light of the transformations that have occurred in the sector. In many cases, a perspective focused on the internal functioning of institutions still prevails, to the detriment of analyzing the external environment, which hinders decision-making and reinforces outdated practices (Soares, 2013). Part of this scenario is due to the fact that many institutions originated from family-based or religious structures and are managed by faculty members who often lack the specific training or competencies required for the position (Andrade, 2005).

Strategic planning

Strategic planning is a fundamental tool for the management of higher education institutions (HEIs), as it allows organizational actions to be aligned with institutional objectives, considering the internal and external context in which they operate. Historically, the concept of strategy emerged in the military field but was incorporated into private organizations and later into the public sector, especially after the post-war expansion period. This movement occurred due to the growing instability of organizational environments, which required more systematic approaches to deal with the unpredictability and complexity of scenarios (Toni, 2021).

Mintzberg's work (2004), frequently cited in the field of planning, contributed to deconstructing the idea of fixed and standardized strategies, highlighting that many of the theoretical solutions offered to organizations lack practical applicability. Thus, HEIs began to adopt strategic planning not only as a regulatory requirement but also as an essential governance tool for addressing contemporary challenges.

According to Machado, Kalnin, and Moraes (2020), strategy can be understood as an action plan directed toward confronting threats and taking



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advantage of opportunities within a given period and environment. For these authors, strategic planning involves the rationalization of organizational objectives and the definition of the means to achieve them, articulating managers' visions with the objective conditions and limitations of the organization. In the university context, this requires specific managerial skills, as managers must be capable of acting politically, instrumentally, and symbolically.

One of the main instruments for implementing strategic planning in HEIs is the Institutional Development Plan (PDI), which became a mandatory document through Decree No. 5,773/2006. This plan is responsible for guiding institutional development based on its mission, vision, and values, articulating available resources with defined strategic objectives. The PDI serves as a link between present management and the institution's future directions and is essential for institutional accreditation and evaluation by regulatory agencies (Da Costa et al., 2022).

The literature also points to the importance of strategic people management as a complementary element to organizational planning. Pinto and Da Silva (2022) observed in their analyses a growing recognition of the need for people management policies that consider multiple methodological perspectives and promote organizational commitment, motivation, and satisfaction among professionals involved in higher education.

Furthermore, strategic planning directly contributes to the improvement of administrative practices, as it enables institutions to understand their current situation, identify challenges and opportunities, and develop realistic strategies to achieve desired results. As stated by Eberhardt and Fernandes (2021), this tool enables institutional alignment by promoting coherence between objectives and actions, strengthening institutional identity and its capacity for action.

For this process to be effective, university management must remain updated and in constant transformation. This implies considering cultural and



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social values as fundamental elements in building a strong institutional identity consistent with the context in which the HEI operates. At the same time, it is necessary to respect the historical roots that sustain the mission of higher education, creating a balance between tradition and innovation (Machado; Kalnin; Moraes, 2020).

In summary, strategic planning in higher education institutions goes beyond compliance with legal requirements. It is a continuous process of reflection, analysis, and decision-making aimed at institutional sustainability and the fulfillment of its educational, scientific, and social mission.

METHODOLOGY

This research can be classified as exploratory, applied, and qualitative. Regarding its objectives, the exploratory nature was assigned because the study seeks to provide an understanding and a possible approach to the management of public educational institutions. The applied nature is attributed to the direct application of already established knowledge to the focal organization. The qualitative approach is adopted because the understanding of the phenomenon occurs through the observed contexts and situations. Finally, regarding technical procedures, this study is classified as a case study, since information and evidence were collected and observed so that the interpretation of the problem could occur in an in-depth manner (Gil, 2022; Martins, 2010).

The study was developed in a public higher education institution located in the state of Rio Grande do Norte. The methodological procedures adopted can be divided into four phases: theoretical review, data collection, data analysis and interpretation, and strategic planning using the BSC. The first stage is essential for the proper structuring of the research. To this end, articles, theses, and books were selected from databases such as ScienceDirect and Scopus, which enabled



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the deepening of knowledge regarding management in educational institutions, strategic planning, and the main tools for executing an efficient strategic process.

The second stage aimed to collect information that would allow the development of a strategic plan for the focal organization. For this purpose, interviews were conducted with the institution's employees, including those holding management positions. To this end, the semi-structured interview technique was used, since the researchers already had knowledge of certain aspects of the phenomenon under study and because of the possibility of making changes and/or adjustments to the questions whenever necessary. In addition, data from a previous study conducted by the same research group were also used as a source of information, in which the perception of the academic community regarding various aspects of the institution was analyzed using the SERVQUAL instrument (results to be published).

During the data analysis and interpretation phase, the information collected served as the basis for constructing the SWOT Matrix. This tool was chosen due to its importance in the decision-making process, since it allows for the systematic analysis of the organization's internal and external environment, facilitating the definition of a strategic position in order to maximize the achievement of organizational objectives (Costa Júnior et al., 2021).

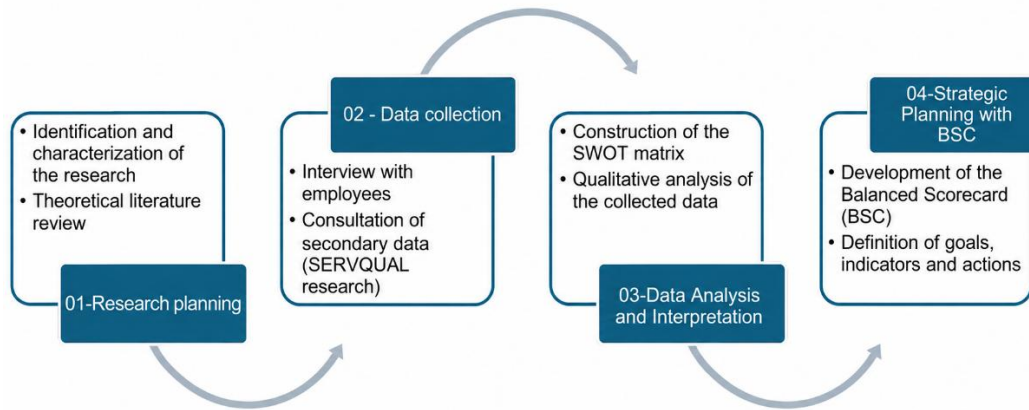
Subsequently, based on the feedback provided by the SWOT Matrix and the information collected, the Balanced Scorecard (BSC) was developed. This tool was adopted because it enables the translation of the institution's strategy into indicators. This process simplifies the monitoring of results and the performance of actions adopted to align strategies related to the following dimensions: financial, customers, internal processes, learning, and growth (Galas; Forte, 2021).

Given the above, Figure 01 below presents a summary of the methodology employed in the present study.



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Figure 1 – Methodological Stages of the Study



Source: Authors, 2025

RESULTS AND DISCUSSION

The higher education institution that is the focus of this study, a specialized academic unit, is located in the interior of the state of Rio Grande do Norte, and its implementation took place in 2020, following a restructuring of the state's public university. Its establishment occurred with the objective of strengthening local identity and contributing to the reinforcement of the university's decentralization process. To this end, the institution offers degree programs in Portuguese/English Language and Literature, Spanish Language and Literature, Business Administration, Production Engineering, and Tourism, in addition to three master's degree programs. Its academic community is composed of 44 faculty members, 21 administrative staff members, and approximately 1,000 students enrolled in both undergraduate and graduate programs.

Given this reality, the institution's mission is to promote the ethical and professional development of its students, focusing on the development of technical, human, and political skills, with the aim of preparing them to act critically and proactively in society. In addition, its vision is to be recognized for



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the quality of its teaching, research, and extension activities, with an emphasis on integration with the market and on the training of qualified professionals capable of addressing society's challenges. Therefore, to make this possible, the SWOT matrix, as presented in Chart 1, serves as an indispensable tool to assist managers in the development of strategic planning. This is reinforced by the fact that the management of educational institutions involves broad issues that go beyond business-related aspects (Araújo; Nascimento, 2023), aiming at the education of critical and productive citizens for society, as well as the production and dissemination of scientific knowledge.

Chart 1: SWOT Matrix for the studied institution.

| STRENGTHS | WEAKNESSES |
|--|---|
| <ul style="list-style-type: none"> - Qualified faculty - Library with an updated collection - Significant regional contribution to local development - Adequate teaching infrastructure for the institution's operation | <ul style="list-style-type: none"> - Deficient support infrastructure (common areas, sports facilities, and student housing) - Insufficient number of professors - Low levels of faculty empathy and support - Lack of academic support services (tutoring, mentoring, individualized assistance) - Absence of an effective student ombudsman system - Few practical opportunities aligned with labor market demands - Institutional culture resistant to innovation and the humanization of relationships |
| OPPORTUNITIES | THREATS |
| <ul style="list-style-type: none"> - Partnerships with the private sector (internships, extension activities, employability centers) - Access to public policies for innovation and funding - Expansion of undergraduate research programs and support for university startups - Growth in public and private funding calls to support university extension projects with social impact and local innovation | <ul style="list-style-type: none"> - Student demotivation and dropout - Competition from distance education (EaD) and private institutions with greater flexibility - Risk of budget cuts and discontinuity in public funding |

Source: Authors, 2025.

The SWOT analysis applied to the reality of a federal public university reveals key elements for the development of strategic planning aligned with the contemporary challenges of higher education in Brazil. Among its strengths, the presence of a highly qualified faculty stands out, an aspect frequently cited as



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one of the main competitive advantages of federal higher education institutions (IFES) (Silva; Andrade, 2021), since more than 90% of professors hold a master's or doctoral degree. Another relevant point is the adequate teaching infrastructure, which supports the provision of on-campus programs with recognized quality. Furthermore, the regional role played by these institutions reinforces their function as drivers of social, cultural, and economic development in the territories where they operate.

However, the identified weaknesses indicate gaps that directly compromise student retention and pedagogical effectiveness. Deficiencies in support areas such as student housing, social spaces, and sports facilities remain a structural bottleneck. The absence of effective student support and welcoming policies is among the factors contributing to student dropout and psychological distress (Santos; Oliveira, 2022). Added to this is the low level of faculty empathy and support, which negatively impacts academic experience and the development of institutional bonds.

The lack of structured academic support, such as tutoring, mentoring, and individualized assistance programs, is identified as one of the main barriers to the successful retention of students from vulnerable social groups (Costa; Ramos, 2022). This limitation is intensified by the insufficient number of faculty members, which compromises both the regular teaching workload and the possibility of engagement in research and extension activities. Furthermore, the absence of an effective student ombudsman system represents an obstacle to active institutional listening, hindering conflict mediation and the proposal of improvements. This shortcoming reflects an organizational culture that remains resistant to innovation and the humanization of relationships, elements that are fundamental in the contemporary context of public education, as argued by Mendonça et al. (2020).



From the perspective of opportunities, the external environment offers significant possibilities for institutional innovation. The potential for partnerships with the private sector, especially in areas such as internships, university extension activities, and employability centers, is a viable strategy for increasing students' integration into the labor market and encouraging practical learning. Such partnerships have been recognized as legitimate mechanisms of social innovation in public higher education (Rocha et al., 2021).

Another promising aspect is access to public funding policies and support programs for research, extension, and technological innovation, such as calls for proposals from CAPES, CNPq, FINEP, and State Research Support Foundations (FAPs). According to the study by Lima and Bezerra (2024), the growth of these opportunities between 2020 and 2023 stimulated a new generation of projects focused on social impact and local innovation, particularly in inland regions and decentralized campuses.

Nevertheless, the identified threats require urgent strategies. Student demotivation and dropout — associated with socioeconomic, emotional, and institutional factors — have increased in the post-pandemic period, according to a survey conducted by the National Forum of Student Affairs Pro-Rectors (FONAPRACE, 2022). Competition from private institutions and distance education (EaD), which offer greater flexibility, challenges public universities to innovate in their pedagogical models and in their ability to attract and retain students. Furthermore, the constant risk of budget cuts, aggravated by unstable political and economic conditions, imposes limitations on university autonomy and on the continuity of long-term institutional policies.

In this context, the strategies outlined in the BSC (Chart 2) emerge as a concrete and integrated response to the dimensions identified through the SWOT analysis. The emphasis on attracting external funding, strengthening student retention, providing continuous faculty development in active learning



methodologies, improving institutional communication, and expanding research and extension activities signals a model of academic management that combines financial sustainability, social commitment, and pedagogical innovation.

Chart 02- BSC - Perspectives and Actions

| Perspective | Objectives | Indicators | Targets | Actions |
|-------------|---|---|---|--|
| Financial | Obtain financial support from private institutions | Number of institutional partnerships established | Target: Establish 2 partnerships per year | Seek support through agreements with companies for R&D projects and extension activities |
| | Increase the acquisition of funding for projects | Amount of resources obtained through public funding calls | Increase by 20% per year | Train faculty and administrative staff to submit projects to agencies such as CNPq, CAPES, FINEP, and State Research Support Foundations |
| Customers | Reduce student dropout | Dropout rate | Reduce dropout by 15% | Expand tutoring and mentoring programs |
| | Improve academic performance | Average academic performance | Increase average performance by 10% | |
| | Increase student satisfaction with institutional infrastructure | Satisfaction level in institutional surveys | Achieve 80% satisfaction | Initiative: Restructure common and social spaces |
| | Improve student education through greater integration into the labor market | Percentage of students engaged in internships/employment | Increase labor market integration by 30% within 2 years | Strengthen internship opportunities with the public and private sectors and activate employability and entrepreneurship centers |

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Chart 02- BSC - Perspectives and Actions - continuation

| Perspective | Objectives | Indicators | Targets | Actions |
|---------------------|--|--|---|--|
| Internal Processes | Improve institutional dialogue and promote the humanization of relationships | Number of services provided and conflicts resolved | Resolve 90% of requests within 30 days | Create a digital ombudsman and active listening system |
| | Expand the permanent faculty workforce | Indicator: Positions offered through public recruitment processes | Open 3 new positions within 2 years | Plan recruitment processes based on vacancies and justify them to the Ministry of Education (MEC) |
| | Increase the number of research and extension projects | Number of active projects registered with PROEX and PRPPG | Increase by 25% within 3 years | Expand internal calls for proposals, recognize dedication hours, and provide support for submissions to external funding calls |
| Learning and Growth | Encourage and expand faculty training in active learning methodologies | Number of faculty members participating in training courses per semester | 25 faculty members per semester | Increase the dissemination of training opportunities among faculty and facilitate travel for in-person courses |
| | Improve the motivation of administrative staff and faculty members | Internal satisfaction index | Achieve 80% satisfaction in institutional surveys | Establish policies for recognition, appreciation, and mental health support |
| | Improve relationships among faculty members | Number of integrative activities carried out | Conduct 2 activities per year | Create spaces for listening and pedagogical dialogue mediated by the CPA or the psychosocial support sector |

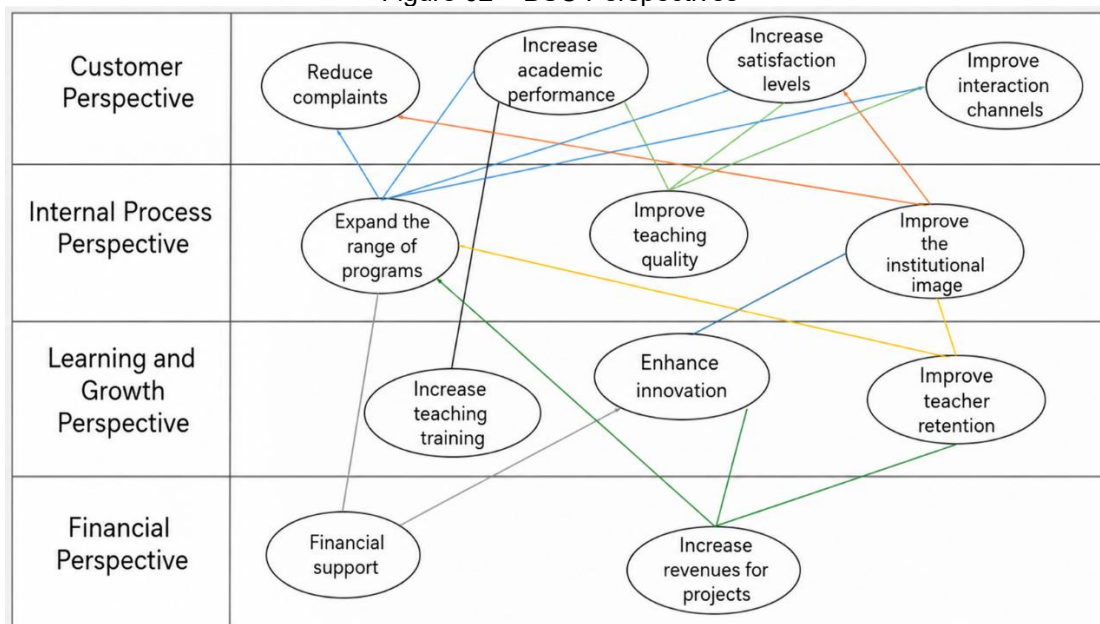
Source: Authors,2025

The BSC, through a set of performance measures, enables the translation of the organization's mission and strategy, ensuring the efficient management of the established actions. This translation is organized into four



perspectives (financial, customer, internal processes, and learning and growth), which are interconnected so that strategic objectives can be achieved, as shown in Figure 2. Unlike other organizations, within a governmental institution, the financial perspective represents a constraint rather than an objective. Thus, the customer perspective becomes the focus of the other perspectives, since it represents the purpose of the organization and requires the internal processes and learning and growth perspectives to be developed with excellence so that the organization can effectively achieve its objectives (Galas; Forte, 2021).

Figure 02 – BSC Perspectives



Fonte: Autoras, 2025

Based on this analysis, the strategies outlined in the BSC not only respond to the challenges identified by the SWOT matrix but also propose a new horizon for institutional action. The emphasis on diversifying funding sources, enhancing student retention, strengthening a culture of listening and support, and valuing the continuous development of faculty and administrative staff constitutes a management model committed to sustainability and innovation. By articulating concrete actions based on evidence and real possibilities, such as public funding



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for research, institutional partnerships, and investment in active learning methodologies, the university positions itself proactively in the face of adversity. This alignment between institutional analysis and strategic action provides the planning process not only with coherence but also with transformative potential, reaffirming the role of the public university as an agent of inclusion, academic excellence, and sustainable regional development.

CONCLUSION

The study presented highlighted the complexity and importance of strategic management in public higher education institutions (HEIs), which requires an approach that goes beyond the mere operationalization of administrative routines. Thus, the research emphasized the challenges and opportunities faced by a university located in Rio Grande do Norte, demonstrating the importance of aligning institutional practices with the challenges of the current context, in which the application of tools that enable diagnostic assessments is essential for the continuous improvement of processes.

In this context, the SWOT matrix emerges as a valuable tool for identifying the internal and external factors that directly influence institutional performance. It made it possible to recognize strengths and opportunities, such as a qualified faculty, adequate infrastructure, the university's potential to consolidate itself as an agent of regional development, partnerships with the private sector for internships that can enhance students' integration into the labor market, as well as the expansion of undergraduate research programs. On the other hand, the identified weaknesses and threats indicate the urgent need to implement actions in the area of people management, particularly regarding the humanization of institutional relationships and student support, the expansion of the faculty workforce, the lack of academic support, and resistance to innovation.



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Given the above, by integrating the Balanced Scorecard (BSC) with the points identified in the SWOT matrix, the research contributed to the development of visible and measurable strategies with clear goals and specific indicators. The four BSC perspectives (financial, customers, internal processes, and learning and growth) provide a vision of a continuous monitoring model aligned with institutional objectives and the real demands of the academic community, ranging from resource acquisition to improving student satisfaction and promoting continuous faculty development. In this way, it is possible to achieve a university management model that is more transparent in its processes, adaptable, and committed to improving decision-making.

The integration of strategic planning and indicator-based management highlights the importance of an institutional culture focused on innovation, active listening, and engagement with society. One of the key points emphasized in the study is the urgency of addressing student dropout, which is closely linked to factors such as inadequate support infrastructure and student demotivation. Therefore, initiatives such as a digital ombudsman system, continuous faculty development, incentives for student practical experiences, and partnerships with the productive sector reinforce the university's commitment to academic excellence, social inclusion, and regional development.

Therefore, the adoption of the SWOT Matrix and the BSC constitutes a viable, replicable, and adaptable alternative for other public educational institutions, as these actions not only improve the educational experience but also strengthen the relationship between the institution and its students.

Finally, for future research, it is suggested that this study be replicated in other institutional contexts across different regions. In addition, studies may be conducted to evaluate the effectiveness of the proposed strategies by examining, for example, reductions in student dropout rates and improvements in student satisfaction through the implementation of the proposed actions, or by



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investigating the effects of teaching improvements resulting from the application of active learning methodologies and faculty development policies.



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