Welcome

Welcome and Introductions

Who are you?

Where are you from?

What would you like to get out of this workshop?
Outcomes

As a result of today’s workshop, participants will be able to:

- articulate the necessary steps to develop a strategic plan.
- identify multiple methods for evaluating a strategic plan.
- guide a division-wide strategic planning process.
- utilize best practices in strategic planning.

Workshop Overview

- Review student affairs strategic planning process
- Review of challenges and celebrations throughout the process
- Identify approaches to evaluate strategic plan
- Determine how a strategic planning process can be implemented on your campus
- Linking division-level strategic planning, institutional-level strategic planning and accreditation
History of Strategic Planning at IUPUI

2002
- First Generation Plan developed
- Consisted primarily of program outcomes

2006
- Second Generation Plan
- Included more student learning outcomes

2012
- Third Generation Plan
- Launched last July
- Institution planning started this fall

Strategic Planning Process

1. Preparing
   a. Key readings and discussion
   b. Identify team

2. Vision, Mission, Values

3. Gathering key information
   a. Self-assessment/Monitoring
   b. Forecasting
   c. Series of analyses
   d. Making sense of the analyses
Scenario 1

- Analysis paralysis

Strategic Planning Process

4. Goal setting
5. Implementing
6. Action plans
   - Define how to get to the goals
7. Tactics
   - Specific actions
   - Associate responsibilities and time lines with each objective
Strategic Planning Process

8. Evaluating the plan
   a. Monitoring progress of the implementation
   b. Continued monitoring of the environment
   c. Progress checks

9. Celebrate milestones and progress

Example: Evaluating Goal 2

Campus Climate: Foster an inclusive, welcoming, supportive and affirming community that contributes to student success.

- A. Division-wide plan to incorporate social justice and positively impact the campus community
- C. Develop a cultural competence model and an outcome-based diversity training series for Division staff

Utilize the Diversity Cabinet’s Diversity Performance Indicator results to develop programming and interventions in areas that need attention
Scenario 2

- It is early July, and your Vice President has asked you for a progress report on the state of planning for diversity initiatives in your area.
  - How far along are you in planning for diversity?
  - Do you involve your colleagues in responding to the VP? If so, how?
  - What other factors might you need to consider in your report?
Real-life lessons omitted from the textbook

- Use the textbook approach for best practices
- Adapt that approach for your institution
- Don’t sacrifice good for perfect
- Have a champion to keep process moving in early stages

FAQs during the planning process

- What is the difference between goals, objectives, outcomes, strategic initiatives and action steps?
- Should we hire a consultant?
- There’s no money for a consultant. Who should facilitate?
- Which goes first, department or division?
Adapt/Adopt

- How do you navigate the environment at your campus?

- Can we simply adopt already-existing principles (mission, values, goals, outcomes, etc.) or do we need to adapt for our purposes?

- What is the climate on your campus? To what extent must your Division adhere to an institution-wide set of principles?

Alignment Approaches
So, how’s that plan working for you?

- NSSE
- Student Life Reputation survey
- Student Satisfaction & Priorities Survey
- Departmental satisfaction surveys
- Departmental program reviews
- Student Life Learning Outcomes (PULs)

“Tracking and nagging” the plan

![Data Update Form](image)
“Tracking and nagging” (cont’d)

<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>OBJECTIVE</th>
<th>ACTION</th>
<th>TIMELINE</th>
<th>COMMENT</th>
<th>RESPONSIBLE PERIC</th>
<th>LEADER</th>
<th>RESULTS</th>
<th>STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.2 Enhance professional development for all employees within Student Life</td>
<td>3.2a: Continue VC's Staff Award Program</td>
<td>VC gives three awards total: PA, CI/TE, SA</td>
<td>8/31/2008</td>
<td>semi-annually</td>
<td>Vice Chancellor, Anderson</td>
<td>Anderson</td>
<td></td>
<td>Ongoing</td>
</tr>
<tr>
<td>3.2b: Enhance professional development for all employees within Student Life</td>
<td>3.2c: Continue the Vice Chancellor's Vision Award</td>
<td></td>
<td>8/31/2008</td>
<td>Annual August Retreat</td>
<td>Vice Chancellor, Anderson, Professional Dev Committee Chair</td>
<td>Anderson</td>
<td></td>
<td>Ongoing</td>
</tr>
</tbody>
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<tr>
<td>3.2 Enhance professional development for all employees within Student Life</td>
<td>3.2d: Each semester conduct a Division orientation and training for staff, graduate assistants, and student employees new to the Division</td>
<td>Develop a Division orientation committee</td>
<td>8/1/2008</td>
<td>Launch on a regular annual schedule</td>
<td>Vice Chancellor, Anderson, Professional Dev Committee Chair, Division Orientation Committee</td>
<td></td>
<td>Complete</td>
<td></td>
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</tbody>
</table>

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<tbody>
<tr>
<td>1.1 Strengthen &amp; build community partnerships</td>
<td>1.1c: Work with the academic schools to increase school-based student involvement</td>
<td>Meet with each IUPUI school every academic year</td>
<td>11/15/2000</td>
<td>% IUPUI schools will be visited each fall semester and % will be visited each spring semester</td>
<td>Vice Chancellor, Assistant Vice Chancellor, Dean, Student Life</td>
<td></td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>1.5 Develop new facilities, programs, services, and opportunities designed to increase community</td>
<td>1.5d: Develop new facilities</td>
<td>Develop a financial plan to design, construct, and manage the next phase of new housing</td>
<td>11/12/2000</td>
<td></td>
<td>Vice Chancellor, Guernsey, Addison, Vice Chancellor</td>
<td></td>
<td>Complete</td>
<td></td>
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**Reporting Progress - Internal**

May 26, 2013

Dear Colleagues:

We have completed 50% of our Division's five-year strategic plan. See the breakdown, below:

![Chart showing breakdown of strategic plan progress]

For the above chart, I combined “complete” and “ongoing” tasks to define 50% of the tasks as complete. Details follow.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Complete</th>
<th>Ongoing</th>
<th>In process</th>
<th>Not started</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>1. Excellence in Community Building</td>
<td>10</td>
<td>5</td>
<td>7</td>
<td>13</td>
<td>35</td>
</tr>
<tr>
<td>2. Excellence in Student Engagement</td>
<td>5</td>
<td>4</td>
<td>5</td>
<td>7</td>
<td>21</td>
</tr>
<tr>
<td>3. Excellence in Professional Practice</td>
<td>6</td>
<td>15</td>
<td>9</td>
<td>4</td>
<td>34</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>21</strong></td>
<td><strong>24</strong></td>
<td><strong>21</strong></td>
<td><strong>24</strong></td>
<td><strong>90</strong></td>
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<tr>
<td><strong>Percentage</strong></td>
<td><strong>23%</strong></td>
<td><strong>27%</strong></td>
<td><strong>23%</strong></td>
<td><strong>27%</strong></td>
<td><strong>100%</strong></td>
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### GOAL 1 Excellence in Community Building

**STRATEGY 1.1 Strengthen & build community partnerships**

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<tr>
<td>1.1a Assess current strategic partnerships to determine effectiveness</td>
<td>Describe existing partnerships across the division through meetings and documentation. Create a matrix listing partnerships, types of these partnerships, and the status of each.</td>
<td>6/30/2011</td>
<td>Not started</td>
</tr>
<tr>
<td>1.1b Increase the number of strategic partnerships that contribute to student community on &amp; off campus</td>
<td>Identify the number of academic partnerships</td>
<td>5/1/2011</td>
<td>Not started</td>
</tr>
<tr>
<td>1.1c Increase the number of strategic partnerships that contribute to student community on &amp; off campus</td>
<td>Increase the number of academic partnerships</td>
<td>5/1/2011</td>
<td>Not started</td>
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<tr>
<td>1.1d Increase the number of strategic partnerships that contribute to student community on &amp; off campus</td>
<td>Identify the number of community partnerships</td>
<td>5/1/2011</td>
<td>In process</td>
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<td>1.1e Increase the number of strategic partnerships that contribute to student community on &amp; off campus</td>
<td>Increase the number of community partnerships</td>
<td>5/1/2011</td>
<td>In process</td>
</tr>
<tr>
<td>1.1f Work with the academic schools to increase school-based student involvement</td>
<td>Meet with each IUPUI school every academic year</td>
<td>12/15/2008</td>
<td>Complete</td>
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**Meeting the Goal for Accomplishments**

- From July 2009 to June 2010, the Campus Center hosted 6,722 events with more than 240,000 people attending.
- One thousand IUPUI volunteers participated in at least one service event.
- Counseling and Psychological Services (CAPS) staff completed more than 100 evaluations for possible learning disabilities or ADHD.
- During spring 2009, 96 educational and social programs were sponsored by Housing and Residence Life resident assistants and Living Your Freshman Year (lyfe) leaders.
- Housing and Residence Life’s Social Justice Advocates sponsored 51 diversity programs this year.
- Student Life and Global Engagement (SLGE) facilitated four immersion programs for students and is developing ethics for teachers and other groups in the community.
- Approximately 400 students attended the Student Advocate Office’s First Off-Campus Housing Resource Fair.
- The Division supported student organizations in establishing campus traditions, such as homecoming and the Regatta.
- Student Life continued plans for additional student residence and a new student recreation, health and fitness center.
Reporting Issues

- How do you combine various sources of data?
- What are important bits to place into the reports?

Planning and Accreditation

- Must have strategic planning linked to institutional planning efforts
  - SACS
  - Middle States
  - North Central
## Linking Strategic Planning with institutional planning at Tulane

- **2000**: Division created strategic plan in line with newly developed institution plan
- **2004**: Division plan revised as division grew
- **2006**: Division plan revised based on Renewal Plan
- **2012**: Institution will complete university-wide strategic plan
  - Division plan will be updated to align with new institutional plan

### Mapping Division Plan to Institutional Goals

<table>
<thead>
<tr>
<th>Divisional Goal</th>
<th>Institutional Goal 1</th>
<th>Institutional Goal 2</th>
<th>Institutional Goal 3</th>
<th>Institutional Goal 4</th>
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<tbody>
<tr>
<td>Divisional Goal 1</td>
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<td>X</td>
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<tr>
<td>Divisional Goal 2</td>
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### Mapping Division Plan to Institutional Goals

<table>
<thead>
<tr>
<th></th>
<th>World-class educational and research programs</th>
<th>A unique relationship to the culturally rich and diverse city of New Orleans</th>
<th>Historical strengths and ability to strategically redefine itself in light of an unprecedented natural disaster</th>
<th>Financial strength and vitality</th>
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<tr>
<td>Student Learning in Multiple Contexts</td>
<td>X</td>
<td>X</td>
<td></td>
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<tr>
<td>A Distinctive Student Experience</td>
<td>X</td>
<td>X</td>
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<tr>
<td>A Culture of Service: Staff Accountability and Student Responsibility</td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Developing Staff as Leaders and Educators in the Learning Process</td>
<td></td>
<td>X</td>
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### Mapping Division plan to other standards

<table>
<thead>
<tr>
<th></th>
<th>Knowledge acquisition, integration</th>
<th>Cognitive Complexity</th>
<th>Intrapersonal Development</th>
<th>Interpersonal Competence</th>
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Questions/ Comments

Contact us:

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