

# DON'T FAIL TO PLAN: DEVELOPING AND ASSESSING A STUDENT AFFAIRS STRATEGIC PLAN

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Robert W. Aaron, Ph.D.  
Director of Assessment and Planning  
Division of Student Life  
Indiana University-Purdue University Indianapolis

Katie Busby, Ph.D.  
Director of Institutional Assessment  
Tulane University

## Welcome

### Welcome and Introductions

Who are you?

Where are you from?

What would you like to get out of this workshop?

# Outcomes

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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

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- ▣ 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

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- Analysis paralysis

## Strategic Planning Process

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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*



## Diversity Performance Indicators

The [Chancellor's Diversity Cabinet](#) evaluated these indicators, beginning with a Web-based vote during the week of October 28, followed by a face-to-face meeting on November 5, 2002, and follow-up discussions by email. The following rating scale was used:

- Either at an acceptable level or clearly heading in the right direction and not requiring any immediate change in course of action. Continuing support should be provided to sustain momentum in these areas.
- Not at an acceptable level; either improving, but not as quickly as desired or declining slightly. Strategies and approaches should be reviewed and appropriate adjustments taken to reach an acceptable level or desired rate of improvement.
- Our current status or direction of change is unacceptable. Immediate, high priority actions should be taken to address this area.

The overall rating of yellow reflects the split among the seven indicators, with 1 being rated green, 6 yellow, 1 red. The rating for each indicator is shown immediately below with links to the measures that entered into the judgments.

- [Recruit and Enroll a Diverse Student Body](#)
- [Retain and Graduate a Diverse Student Body](#)
- [Engage students, through the curriculum and co-curriculum, in learning about their own and other culture and belief systems](#)
- [Contribute to the climate for diversity in Indianapolis, Central Indiana, and the entire state](#)

## 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

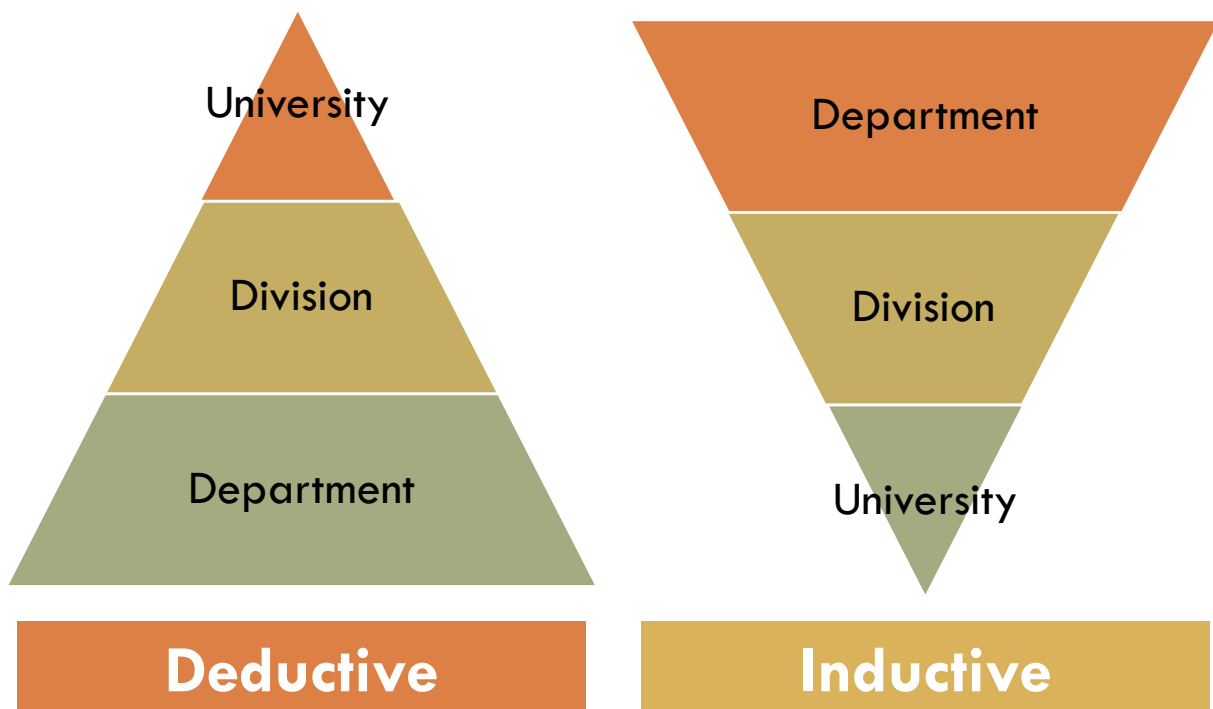
# FAQs during the planning process

- 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

The screenshot shows a Microsoft Access window titled 'Plan DB: Database (Access 2007) - Microsoft Access'. The ribbon includes 'Home', 'Create', 'External Data', 'Database Tools', and 'Acrobat'. The 'frm Data Update' form is displayed in 'Form View'. The form contains the following fields:

GOAL:	1 Excellence in Community Building	LEADER:	Sims-Harris
STRATEGY:	1.4 Foster campus spirit through promotion of existing and new campus traditions	TIMELINE:	1/31/2009
OBJECTIVE:	1.4b1 Increase student involvement by increasing promotion and execution of campus traditions	COMMENT:	
ACTION:	Develop tracking mechanism to assess student involvement in specific campus traditions	OUTCOME:	Research, select, purchase, pilot and implement an electronic tracking system to track student participation in campus traditions
EMPLOYEES RESPONSIBLE:	Aaron, Sims-Harris, OSI Director	RESULTS:	possibly use Student Link?; using card reader system fall 2009
		STATUS:	Ongoing

At the bottom of the form, there are navigation buttons (back, forward, refresh) and a status bar showing 'Record: 1 of 25 of 90', 'Unfiltered', and a search field. The bottom right corner shows 'Form View' and 'Num Lock'.

# “Tracking and nagging” (cont’d)

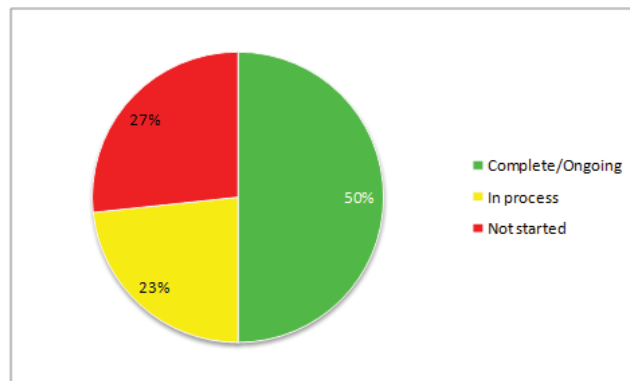
Strategic Plan Tasks by Staff Member								
Employee Report by Month					Last Name: Vice Chancellor			
TIMELINE by Month August 2008								
STRATEGY	OBJECTIVE	ACTION	TIMELINE	COMMENT	RESPONSIBLE PERSC	LEADER	RESULTS	STATUS
3.2 Enhance professional development for all employees within Student Life	3.2e1 Continue VC SL Staff award program	VC gives three awards total: PA, CL/TE, GA	8/31/2008	semesterly	Vice Chancellor, Anderson	Anderson	program rolling out in fall '08 (apps due 11/30/08); awards presented spring '09	Ongoing
3.2 Enhance professional development for all employees within Student Life	3.2e2 Continue VC SL Staff award program	Continue the Vice Chancellor's Vision Award	8/9/2008	Annual August Retreat	Vice Chancellor, Anderson, Professional Dev. Committee Chair	Anderson	'07-'08 Vision Award will be given at State of Student Life Address	Ongoing
TIMELINE by Month September 2008								
STRATEGY	OBJECTIVE	ACTION	TIMELINE	COMMENT	RESPONSIBLE PERSC	LEADER	RESULTS	STATUS
3.2 Enhance professional development for all employees within Student Life	3.2d1 Each semester conduct a Division orientation and training for staff, graduate assistants, and student employees new to the Division	Develop a Division-level orientation committee	9/1/2008	Launch on a regular annual schedule	Vice Chancellor, Anderson, Professional Dev. Committee Chair, Division Orientation Committee	Anderson	Committee members include Aaron, Anderson, Lewis, Pasternak	Complete
TIMELINE by Month December 2008								
STRATEGY	OBJECTIVE	ACTION	TIMELINE	COMMENT	RESPONSIBLE PERSC	LEADER	RESULTS	STATUS
1.1 Strengthen & build community partnerships	1.1c Work with the academic schools to increase school-based student involvement	Meet with each IUPUI school every academic year	12/15/2008	½ IUPUI schools will be visited each fall semester and the other ½ will be visited each spring semester	Vice Chancellor, Assistant Vice Chancellor, Spratt	Vice Chancellor	2008-2009 met with all schools, established annual meetings	Complete
1.5 Develop new facilities, programs, services, and populations designed to increase community	1.5a1 Develop new facilities	Develop a financial plan to design, construct, and manage the next phase of new housing	12/12/2008		Vice Chancellor, Guenard, Addison	Vice Chancellor		Complete

## Reporting Progress - Internal

May 25, 2010

Dear Colleagues:

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



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

Goal	Complete	Ongoing	In process	Not started	Total
1 Excellence in Community Building	10	5	7	13	35
2 Excellence in Student Engagement	5	4	5	7	21
3 Excellence in professional practice	6	15	9	4	34
<b>TOTAL</b>	<b>21</b>	<b>24</b>	<b>21</b>	<b>24</b>	<b>90</b>
<b>PERCENTAGE</b>	<b>23%</b>	<b>27%</b>	<b>23%</b>	<b>27%</b>	<b>100%</b>

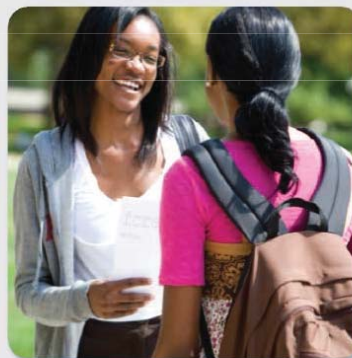
# Reporting Progress – Internal/External

IUPUI   DIVISION OF STUDENT LIFE INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS		Strategic Plan Report 2007-2012	
OBJECTIVE	ACTION	TIMELINE	Status
<b>GOAL 1 Excellence in Community Building</b>			
<b>STRATEGY 1.1 Strengthen &amp; build community partnerships</b>			
1.1a Assess current strategic partnerships to determine effectiveness	Describe existing partnerships across the division through meetings and documentation. Create a matrix listing partnerships, types of these partnerships, and the status of each.	6/30/2011	Not started
1.1b1 Increase the number of strategic partnerships that contribute to student community on & off campus	Identify the number of academic partnerships	5/1/2011	Not started
1.1b2 Increase the number of strategic partnerships that contribute to student community on & off campus	Increase the number of academic partnerships	5/1/2011	Not started
1.1b3 Increase the number of strategic partnerships that contribute to student community on & off campus	Identify the number of community partnerships	5/1/2011	In process
1.1b4 Increase the number of strategic partnerships that contribute to student community on & off campus	Increase the number of community partnerships	5/1/2011	In process
1.1c Work with the academic schools to increase school-based student involvement	Meet with each IUPUI school every academic year	12/15/2008	Complete

# Reporting Progress - External

The Division of Student Life strives to be a campus leader in building community to support student learning and success. This is accomplished by strengthening and building community partnerships; promoting and embracing diversity; ensuring community-building actions and accomplishments are frequently communicated to students, staff, faculty and other stakeholders; fostering campus spirit through promotion of existing and new traditions; and developing new facilities, programs, services and populations designed to increase community.

Excellence in Community-Building



**MEETING THE GOAL: Our Accomplishments**

- From July 2008 to June 2009, 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 disorders 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 others 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 with plans for additional campus housing and a new student recreation, health and fitness center.



**EDUARDO NIETO**  
Junior, Business Major  
Past President, IUPUI U  
Student Government

Eduardo Nieto's IUPUI career is the perfect example to support the adage, "life is what you make it." A native of Guadalajara, Mexico, Nieto came to the U.S. with his mother and two brothers in 2002. While in high school, he began looking for colleges that were affordable and close to home. At IUPUI, he found both—and much more.

Nieto's first brush with student involvement at IUPUI came while working on Campus & Community Life's Democracy Plaza—a project offering students a chance to express their thoughts on current events and campus issues on large chalkboards located around campus.

# Reporting Issues

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

# Planning and Accreditation

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- 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

	Institutional Goal 1	Institutional Goal 2	Institutional Goal 3	Institutional Goal 4
Divisional Goal 1	X			X
Divisional Goal 2		X		
Divisional Goal 3		X		
Divisional Goal 4			X	
Divisional Goal 5				X

# Mapping Division Plan to Institutional Goals

	World-class educational and research programs	A unique relationship to the culturally rich and diverse city of New Orleans	Historical strengths and ability to strategically redefine itself in light of an unprecedented natural disaster	Financial strength and vitality
Student Learning in Multiple Contexts	X	X		
A Distinctive Student Experience	X	X		
A Culture of Service: Staff Accountability and Student Responsibility			X	X
Developing Staff as Leaders and Educators in the Learning Process			X	X

# Mapping Division plan to other standards

	Knowledge acquisition, integration	Cognitive Complexity	Intrapersonal Development	Interpersonal Competence
Divisional Goal 1	X			
Divisional Goal 2		X	X	
Divisional Goal 3			X	
Divisional Goal 4		X	X	
Divisional Goal 5			X	X

# Questions/ Comments

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Contact us:

Rob Aaron

Director of Assessment & Planning  
Division of Student Life  
Indiana University-Purdue University  
Indianapolis  
355 Lansing St., AO 112  
Indianapolis, IN 46202

Phone: 317-274-7225

Email: [rwaaron@iupui.edu](mailto:rwaaron@iupui.edu)

[www.life.iupui.edu](http://www.life.iupui.edu)

Katie Busby

Director of Institutional Assessment  
Tulane University  
6823 St. Charles Ave  
200 Gibson Hall  
New Orleans, LA 70118

Phone: 504-314-2898

Email: [kbusby@tulane.edu](mailto:kbusby@tulane.edu)

[tulane.edu/assessment](http://tulane.edu/assessment)