

Raising the Stakes: Breathing Life into Your Strategic Plan

Inside Higher Education Webinar
February 15, 2024



Agenda

- Introductions
- Institutional Planning
 - Design
 - Process
 - Assessment
- Q&A
- Next Steps



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BALL STATE
UNIVERSITY



Doug Masterson
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THE UNIVERSITY OF
SOUTHERN
MISSISSIPPI.



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Planning & Assessment



Purchase College
STATE UNIVERSITY OF NEW YORK

Ball State University

- At-a-glance
 - Muncie, Indiana
 - 21,000 students
 - Across 7 colleges
 - 81% Retention rate
 - 94% Career Placement Rate
 - 40% of student are first generation college
- Immersive, hands-on learning environment with our collaborative, outstanding faculty provides a way to continue lifelong journey to a fulfilling career and a meaningful life.





University of Southern Mississippi

- The University of Southern Mississippi is a public, comprehensive research university (R1) located near the Gulf of Mexico.
- USM is composed of four academic colleges and has signature programs in the areas of Music, Marine Science, and Polymer Science and Engineering.
- We pride ourselves on balancing an exceptional, internationally known research profile with an emphasis on student-centered pedagogy and support.
- One of eight public institutions of higher learning in a small state and, like many universities, face increasing budgetary challenges and a competitive environment for student recruitment.

SUNY Purchase

- At-a-glance
 - Purchase, NY
 - 500 acres of open fields and sprawling forests, about 30 miles (or a short train ride) north of New York City.
 - ~3,300 Students
 - 47 majors and 32 minors of undergraduate study, and seven graduate programs.
- We're a distinctive member of the SUNY family. We're the dreamers, the DIYers, the future of arts and culture, of the humanities and the sciences.



Inspired by the Amazing Power of Data

HelioCampus is purpose-built to **advance the impact of analytics in higher education.**



Data Experts



Simplifiers



Transparent



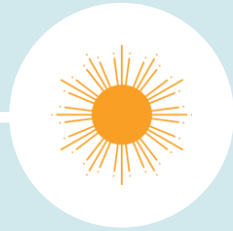
Supporting Change

Innovation from Within Higher Ed



2010

First generation platform at UMGC



2016

HelioCampus spun out to serve higher education



2020

HelioCampus adds Benchmarking capabilities



2021

HelioCampus adds Assessment capabilities



Future

Accelerating higher education's path to achieve mission & sustainability

Solutions for Forward-Thinking Institutions

Turn your data into a high-value asset with SaaS-based platforms and data scientists ready to work side-by-side to solve your toughest challenges.



HelioCampus
Data Analytics



HelioCampus
Financial
Intelligence



HelioCampus
Assessment
& Credentialing

Question 1

Which of the following best describes your Strategic Planning initiatives at your institution?

- A. We have a lot of work to do
- B. We are designing a new plan
- C. We have had a soft roll out of the plan
- D. We are using the data to inform change



Four Assessment Trends in Higher Education



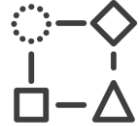
1.
Moving from
compliance to
improvement



2.
Valuing more
types of
evidence



3.
Assessing your
strategic
plan



4.
Connecting
curricular and
co-curricular
assessment

Takeaway 3: Making informed decisions about your future



**3.
Assessing your
strategic
plan**

Five Phases of Effective Strategic Planning



Source: Keith, C.J. Hundley, S.P. Process Considerations for Strategic Planning: Phase #5, Reporting and (Re)Iteration. Assessment Update. 2023.

Roadmap for the future begins now

- Strategic planning should be organized as an iterative process.
 - “Though a specific strategic plan may “expire,” the associated work should be ongoing and cyclical.”
- Reassess and realign the plan to ensure it continues to reflect the core values and objectives of the institution.
 - Required by accreditation bodies but truly a best practice
- Regular review/adjust the plan prevents wasteful use of resources.
 - Efficiencies and resource allocations need to be data-driven
- Helps to identify emerging needs and opportunities
 - Surfaces hidden gems and successes
- Regular cadence of review, adjustment and reiteration of your plan enable institutions to remain relevant, accountable and competitive.

How do you engage stakeholders in revising / reiterating on your strategic plan?



Ball State University Strategic Plan



**BALL STATE
UNIVERSITY**

GOAL 1

UNDERGRADUATE EXCELLENCE AND INNOVATION

Our University provides a premier on-campus undergraduate experience.

GOAL 2

GRADUATE EDUCATION AND LIFETIME LEARNING

Our University expands its reach and impact along the continuum of human development and is nationally recognized for serving graduate students and other adults throughout their lifetime educational journey and for our agility in anticipating and responding to workforce needs.

GOAL 3

COMMUNITY ENGAGEMENT AND IMPACT

As a community-engaged institution, our University is internationally recognized for mobilizing and leading partnerships that revitalize and sustain our city and our region.

GOAL 4

SCHOLARSHIP AND SOCIETAL IMPACT

As a public research institution, our University recruits and retains outstanding faculty and staff who engage in scholarship—of discovery, integration, application, and teaching—that garners national and international recognition, attracts external resources, and improves lives.

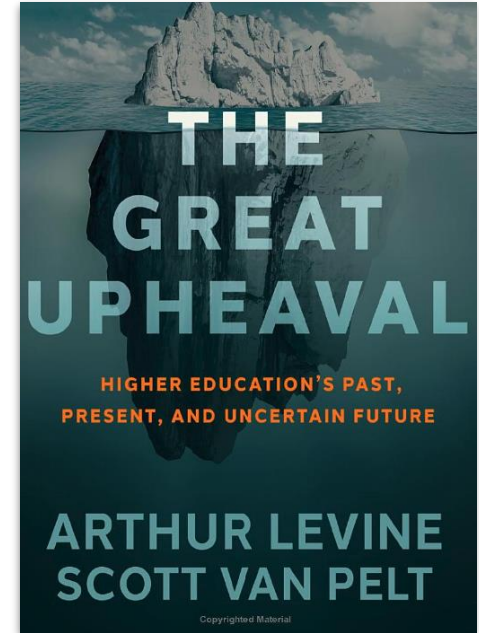
GOAL 5

INSTITUTIONAL AND INCLUSIVE EXCELLENCE

Our University is distinguished for institutional effectiveness and inclusive excellence across all dimensions of our work and for having a positive and vibrant culture of wellbeing that helps our faculty and staff lead engaged and meaningful lives.

Lessons from *The Great Upheaval*

- Institutional Control of Higher Education will decrease, and the power of higher education consumers will increase.
- With near universal access to digital devices and the internet, students will seek from higher education the same things they are getting from the music, movie and newspaper industries.
- New content producers and distributors will enter the higher education marketplace, driving up institutional competition and consumer choice and driving down price.
- The industrial era model of higher education, focusing on time, process and teaching, will be eclipsed by a knowledge economy successor rooted in outcomes and learning.
- The dominance of degrees and just-in-case education will diminish; non-degree certifications, and just in time education will increase in status and value.



GOAL 2

Graduate Education and Lifetime Learning

Our University expands its reach and impact along the continuum of human development and is nationally recognized for serving graduate students and other adults throughout their lifetime educational journey and for our agility in anticipating and responding to workforce needs. To advance this goal, Ball State University is developing an initiative to expand our educational offerings to include non-credit courses for adult learners and customized training for employer partners.

i **GUIDING PRINCIPLES & FAQs**

Ball State University

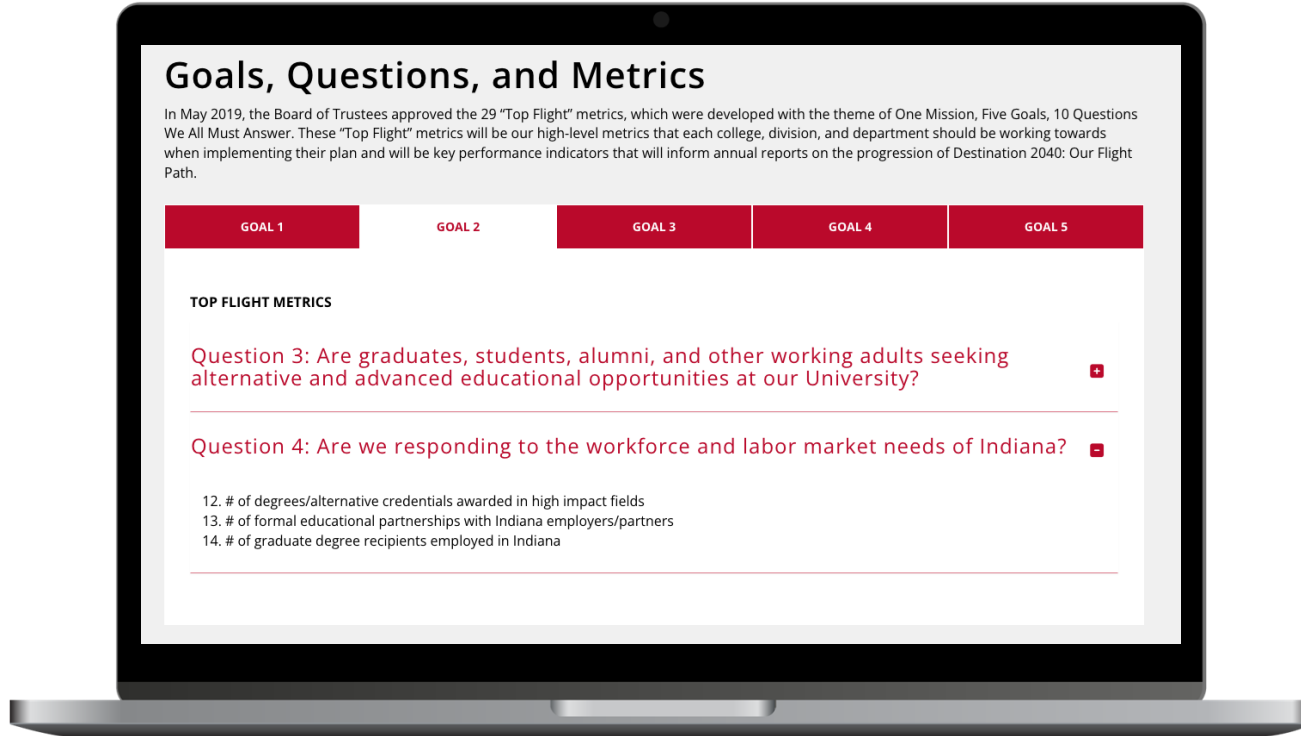


Strategic Imperatives

To make measurable progress towards Ball State University's 2040 goal, we will execute the following strategic imperatives by 2024:

- A. Our University identifies and offers high-demand degrees and credentials in fields that align with our current and potential expertise.
- B. We offer a strategic portfolio of superior on-campus and online graduate programs.
- C. Our innovative and robust educational offerings and delivery methods—including baccalaureate and postbaccalaureate micro-credentials, short-term learning modules, professional licensure workshops, and enrichment opportunities—accelerate career fulfillment and enhance personal development and wellbeing.
- D. We meet the diverse needs of individuals, employers, and organizations by allowing them to customize their education to specific learning objectives and interests.
- E. Every graduate has access to a coach or mentor who helps that graduate develop, implement, and execute a lifetime learning plan.

Ball State University



Goal 2 Progress

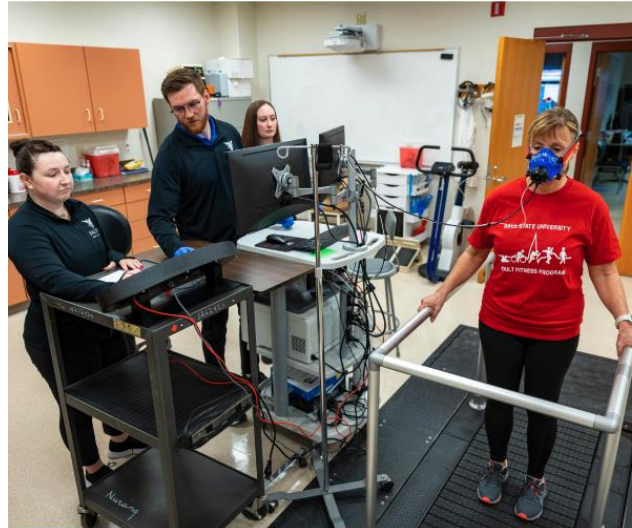


DESTINATION 2040 OUR FLIGHT PATH

GOAL 2 Graduate Education and Lifetime Learning

87 Priorities for Action
(PFA) across campus

Our University expands its reach and impact along the continuum of human development and is nationally recognized for serving graduate students and other adults throughout their lifetime educational journey and for our agility in anticipating and responding to workforce needs.



Goal 2 Measuring Impact:

School of Kinesiology

PFA: The School of Kinesiology offers high-demand graduate degrees and credentials in fields that align with expertise.

Measured: The department tracked the number of applications, post-graduation placement rate, number of certificates, micro-credentials, and alternative credentials awarded.

Outcomes: The Master's of Clinical Exercise students had a 100% graduate placement; the Master's of Sport and Exercise Psychology (SEP) program is one of a few programs in the country to offer a dual degree with Counseling; and the number of applications is up in two graduate programs (SEP and Athletic Training [AT]).

Success Stories: Through interactions with the directors of programs and research laboratories, our University has received compliments for how well Ball State students are prepared for their positions both in academia and industry. The Biomechanics program has been able to stay current with technology and continues to produce graduates prepared for both academia and employment in fields related to the field of biomechanics and kinesiology.

How are you **facilitating a culture of data informed decision-making** which supports your strategic plan?

Cultivating Data-Grounded Leadership, 2018–2020

- **Restructuring Institutional Research**
 - Greater service-orientation and visibility on campus
 - Increased emphasis on analytics and data sharing
- **Creating expectations and accountability for leadership**
 - Peer data averages
 - Dashboard monitoring



INSTRUCTIONS

Data Dictionary

Note: Reports to which you have access will appear with blue text hyperlinked to the report. Reports in black text are those to which you do not have access.










Student Dashboard Links

 Academic Advisors	 Admissions	 Completions	 Course Credit Hours	 Enrollment Trends	 Financial Aid
 GEC	 Graduate Assistants	 IPEDS	 Program Review	 Retention and Graduation	 USM Data Facts

Finance Dashboard Links

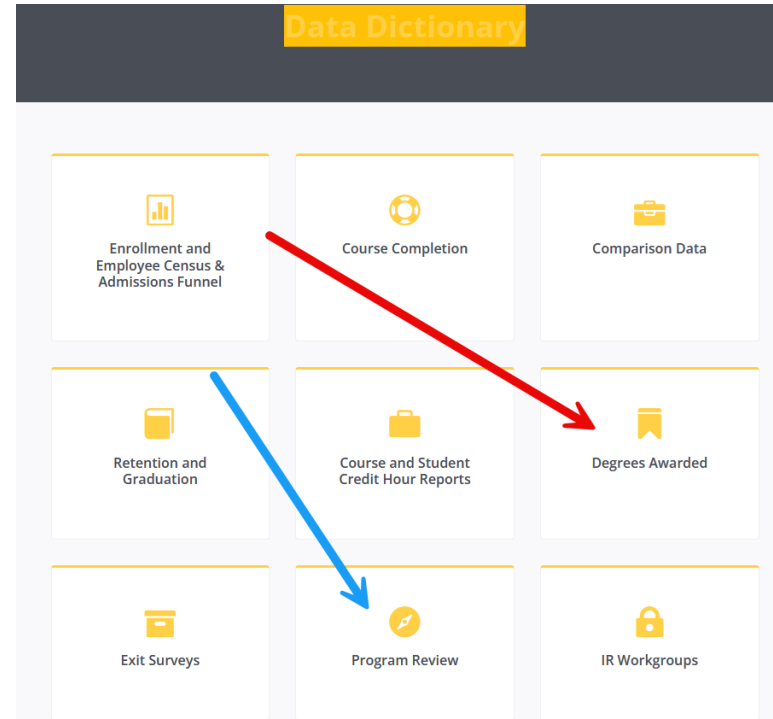
 Aging	 Budget Vs Actuals	 Budget Forecast	 Institutional Aid Analysis	 Finance Reports	 Net Tuition Revenue
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Program Costing Links

 Academic Unit Management	 Budget Rubric	 Course Reassignment Investment	 Faculty Market Analysis	 Instructional Capacity	 KPI's	 Presidential Summary	 Program Costing	 Resource Allocation
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Data Grounded Strategic Planning at USM

- Enrollment Trends
- Retention Trends
- Program Productivity
- Scorecard Information
- Faculty Information
- Exit Survey Data
- NSSE Data





Institutional Effectiveness

Improvement Through Insight



THE WAY TO GET STARTED IS TO
QUIT TALKING AND BEGIN DOING.

- WALT DISNEY

What is your process for **launching the plan** to drive collaboration and action?

The Purchase College Strategic Plan 2021-2027



Purchase at 60: Building Our Future

Letter from the President	+
Vision Statement	+
Mission Statement	+
Community Values	+
Institutional Learning Outcomes	+
Our Promise	+

- Empowering the Creative Student
- Transforming with Creative, Relevant, and Meaningful Programs
- Embracing Inclusion for a Creative Campus
- Sustaining a Creative Future
- Expanding the Creative Community



Purchase College

STATE UNIVERSITY OF NEW YORK

Process for Planning and Assessment

This continual process consists of the following steps:

1. Establishing priorities and goals designed to fulfill the mission and vision, while adhering to College values. (*Where to you want to be? What do you want to achieve?*)
2. Identifying objectives and strategies to achieve goals, with desired performance levels, and metrics to measure achievement. (*How are you going to get there?*)
3. Allocating appropriate resources to support objectives and strategies. (*What will it cost?*)
4. Collecting meaningful data to assess the actual performance levels. (*How will we know?*)
5. Analyzing the data (*What does it mean?*)
6. Determine success of strategies and tactics and extent to which objectives were met. (*How did we do?*)

A simple flow chart shows the linear progression of these steps.



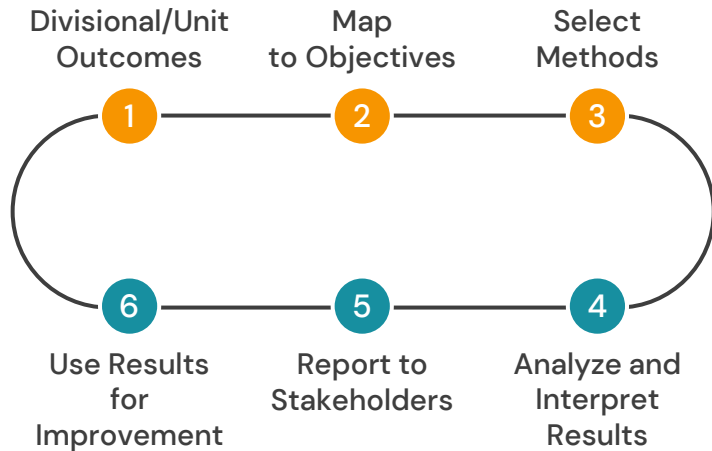
For the process to be continual, however, it cannot be linear. Institutional effectiveness (planning and assessment) is not an end. Rather, the results of the assessing are used to modify objectives, adjust allocation of resources, and continue to enhance the quality of our programs and services. So, the series of linear boxes becomes a closed and circular loop:



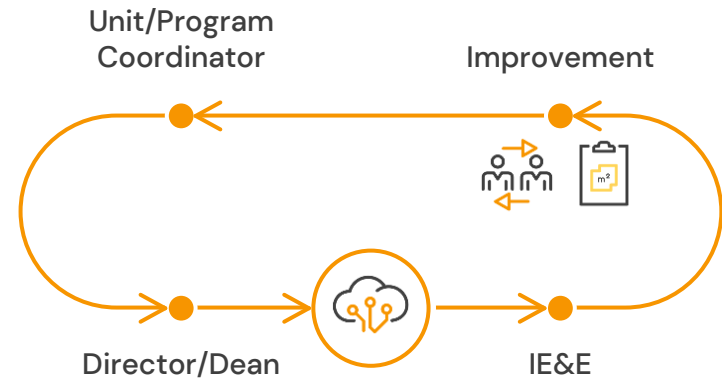
After data is analyzed to determine the success of strategies and extent to which objectives were met, it must be shared and used to inform adjustments to goals and objectives, strategies and objectives, and resource allocation. Thus, the process becomes continuous and leads to continual and consistent innovation and improvement.

Partnership and Collaboration Data Collection and Workflows

Dynamic Form



Workflow



Strategic Planning

Design a Process– that includes a workflow, timeline and contributors

- **Strategic Plan Data Collection** that uses overarching goals and individual objectives and designates a stakeholder to fill in activities for meeting goals.
- **Strategic Plan Objective Data Collection** collects data on the objective level and sent to specific stakeholders.
- **Program/Unit Data Collection** alignment of unit goals to strategic goals/objectives and institutional learning outcomes calling for measures of these goals and specific outcomes

Budget Summary Report Strategic Planning

1.3
Connecting students to faculty through academic advising, joint faculty and student research, and faculty and staff support of general studen

Activity Questions

1
Did you receive the resources you needed this year?

	Amount Requested	Amount Approved
Time (Hours)		
Financial (\$)		
People		
Other (If helpful, they need to be able to describe??)		

Were the resources that you received this year adequate to achieve your objectives?

← → Formats ✂ 📄 🖨 B / [Text Alignment Icons] [List Icons] [Table Icon] [Link Icon] A - [Color Picker] <>

Question 2

To what extent have you mapped your strategic plan objectives to departmental/unit objectives?

- A. Plan is still in flux
- B. Plan is activated but not shared widely
- C. Plan is activated and teams are contributing their activities
- D. Plan is activated, data collected and group meetings are taking place



Reflection and Next Steps

What could you immediately do to change your Integrated Planning process?



Question 3

Are you interested in learning more about HelioCampus solutions?

- A. Yes
- B. No
- C. Already a client



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Q&A



Thank you

Helio
CAMPUS