

IR Perspectives on the Strategic Planning Process

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Introduction

- Strategic planning at two institutions: Springfield College and Tufts University

- Different stages in the process

- 3 Perspectives
 - ✓ Senior Administrator
 - ✓ Director of IR
 - ✓ Analyst



SPRINGFIELD COLLEGE

Springfield College

Unique Strategic Planning Process

- Based upon Solliday & Mann (2013) Surviving to thriving: A planning framework for leaders of private colleges and universities. Whitsett, NC: Credo.

Phase I: Design Team (2015-2016)

- Small focused but representative team spent year reviewing institutional data
- Created initial themes and identified initiatives
- Themes and initiatives vetted thoroughly throughout the institution with interviews and open forums
- Final themes identified and initiatives identified

Phase II: Strategic Planning Working Group (2016-2017)

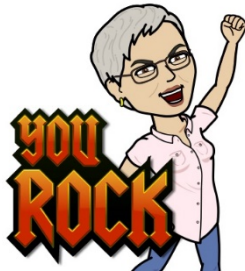
- Working Groups identified for 17 initiatives
- President plus two key leaders are managing the planning process and working groups.
- Members of President's Cabinet are leading the working groups
- Over 190 faculty, staff and students participating in working groups
- Groups spent year addressing their charges
- Cabinet serves as the group that initially receives and vets group reports

Phase III: Next Steps: Sharing Findings and the Data (2017-2018)

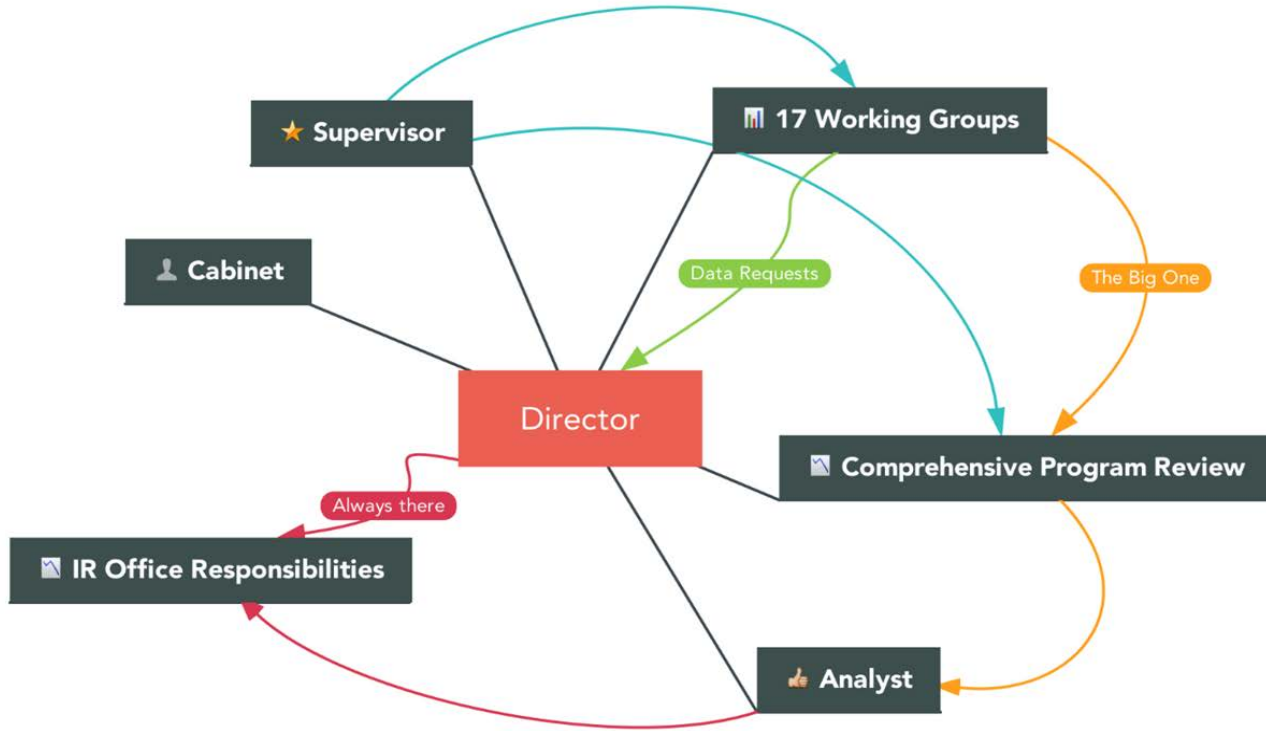
- Some groups finishing up initiatives and making recommendations
- Other groups sharing data and intermediate steps
- New working groups being initiated



Senior Administrator Academic Affairs Perspective

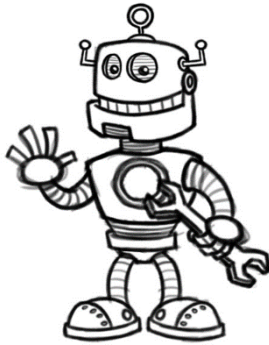


Springfield College



Role of the Research Analyst

Given a question – asked for an answer



<http://blog.coghillcartooning.com/2925/classroom-antics-robot-mascot-character/>



<http://store.metmuseum.org/sculpture/rodin-the-thinker-sculpture/invt/80010981>



<http://wondersofdisney.webs.com/mickeymouse/mickdetective/mickdetective.htm>



Comprehensive Academic Program Review

Criteria Name	Who/What	Data Sources	Level	Rating Scale	Points	
					Undergraduate	Graduate
1 History and Expectations (Looking to the past how successful has the program been?) (5 pts.)	Has it changed to stay current with trends in higher education, student demographics and workforce needs?	Review of Program Outcomes Assessment Reports Over time	C/P	Yes or No	100	100
Total					100	100
2 External Demand (Is there sufficient demand for the program?) (15 pts.)	What is the relative external demand for the program?	Applications (% of total)				
		Graduate	P	High or Medium or Low		23
		Undergraduate (first time full time)	P	High or Medium or Low	20	
		Transfer	P	High or Medium or Low	10	
	What is the level of demand relative to capacity / slots available?	Selectivity (acceptances/application) (low value gets a higher rating)	P	High or Medium or Low	20	18
	Relative yield of accepted students enrolling in Springfield College	Yield (enrollments/acceptances)	P	High or Medium or Low	25	26
How robust are job projections for graduates of the program?	National employer projections (Graduate) Career placement data to jobs or grad school (Undergraduate)	P	High or Medium or Low	25	33	
Total					100	100

Who's messing up whom?

*Stage: Monday afternoon, Mary Ann emails all deans and department chairs to review their programs' data through the Google Drive folder the IR team **meticulously** structured to ensure privacy within departments... Wednesday afternoon the following occurs:*

Provost to Mary Ann (4:06 pm)

Did you know the chairs can see *ALL* the data if opened on the iPad?

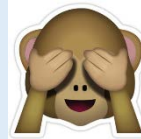
Raldy to Jake (5:04 pm)

We need to look into this...

Mary Ann to Raldy (4:21 pm)

Is this true? Did the permissions *NOT* work on the iPad?

Jake... in disbelief



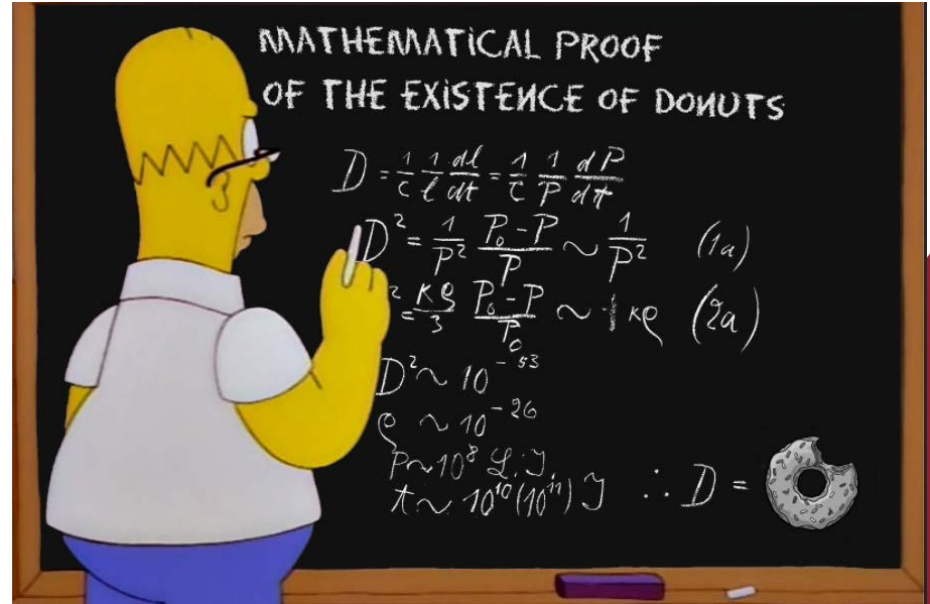
Can we really...

Do This?



<http://blondesmakemoney.blogspot.com/2011/12/assembly-required.html>

Explain This?



http://www.gkbgraphics.com/?page_id=3222

SPRINGFIELD
COLLEGE

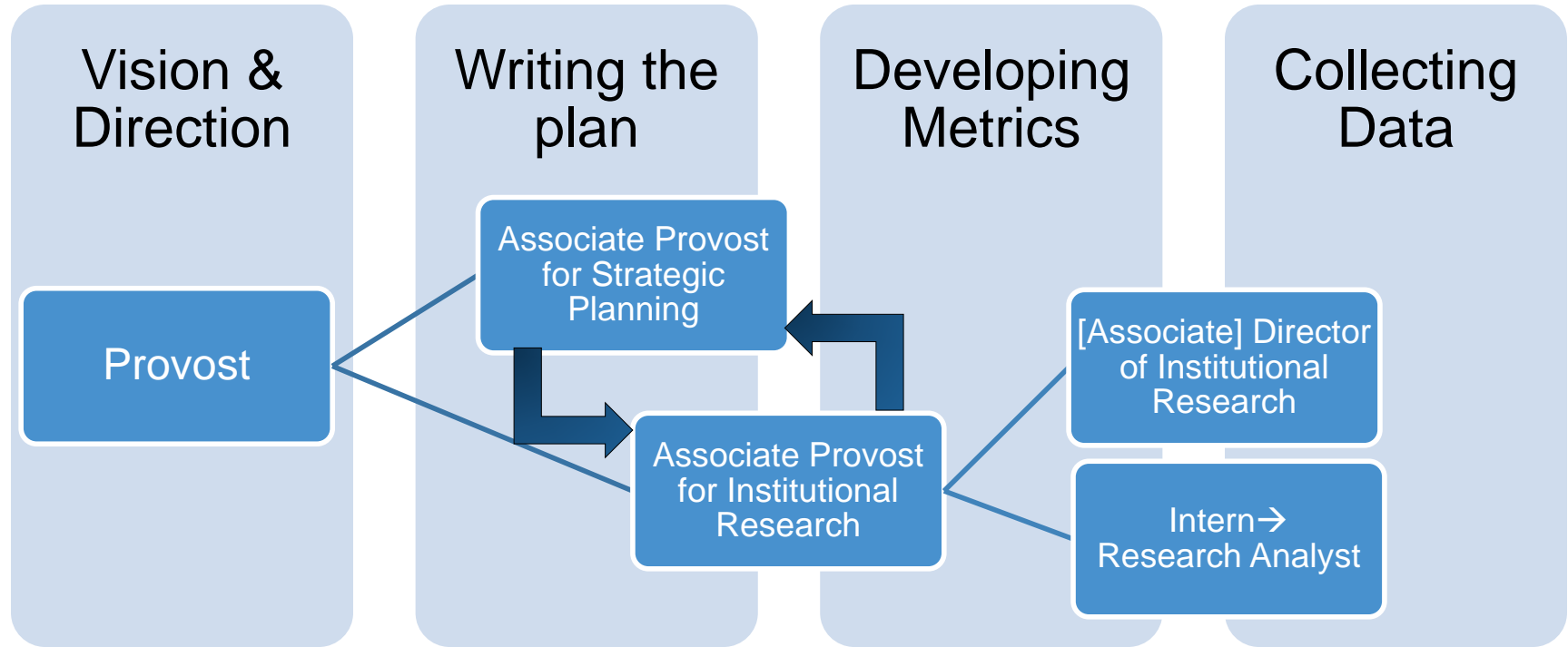


TUFTS UNIVERSITY

Tufts University –Strategic Planning Process

- New Provost July 2012, tasked with developing a strategic plan for Tufts
- Associate Provost for Strategic Planning was hired to implement the Provost’s vision and develop the plan
- Timeline was quick, with several stages
 - October 2012: Strategic planning initiative launched; Town hall meetings hosted; Steering Committee, Core Committees & Working Groups assembled
 - November 2012: Working groups and Core committees began meeting
 - December 2012: Working group reports due
 - January 2013: Core committee reports due
 - March 2013: Preliminary plan – The “Prelude to the Strategic Plan” published & feedback gathered
 - June 2013: Feedback to the Prelude synthesized
 - September 2013: Final Strategic plan available
- Associate Provost for Institutional Research worked closely with Strategic Planning provost, while the planning process proceeded, to develop metrics to track the strategic plan

Associate Provost for Institutional Research



[Associate] Director of OIRE

Strategic Planning Process

Associate
Provost for IR

Associate
Provost for
Strategic
Planning

Institutional Research

Data support for
Planning Process

Evaluation of
Planning Process

Strategic Metrics

Finding
Data

Collecting
Data

Organizing
Data

Presenting
data

Analyst

The Plan:
What are we trying to do?



The Metrics:
How can we measure it?



The Data:
What do we see?



Current Status

November 2013

April 2015

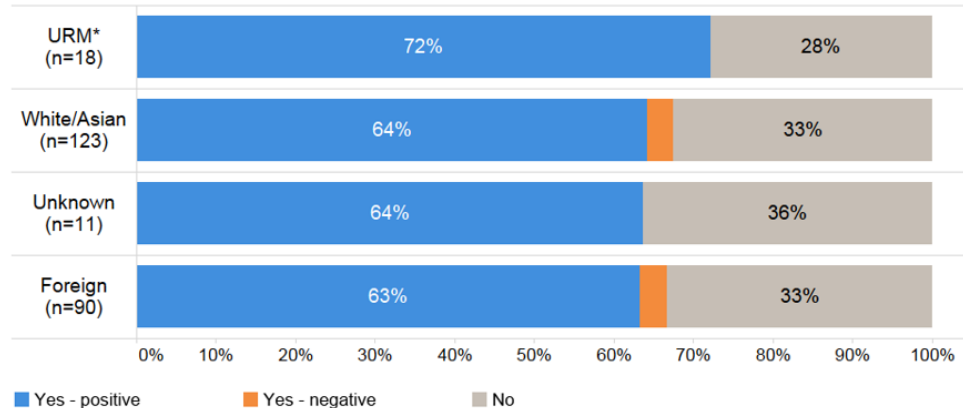
November 2017



Undergrad
During your experiences t
world

The Fletcher School: Transformational experiences by race/ethnicity*

During your time at Tufts, have you had a transformational experience?
If yes, was that experience a positive one or a negative one?



Similarities and Differences

- Organization of planning process
- Roles of VP/Provost, IR Director, IR Analyst
- Metrics: Collection Process & Use



Questions/Comments

