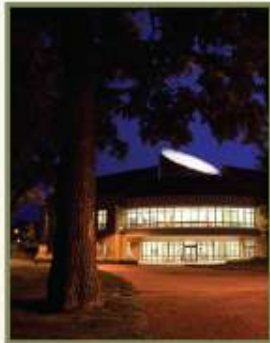


Two Paths, One Goal:

Connecting the Self-Study to the Strategic Plan



INDIANA UNIVERSITY
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About Today's Presentation

- Strategic Planning
- The Self Study Report and Visit
- The Process of Linking the Two
- Takeways



About Today's Speakers

- **Sandra Patterson-Randles**
Chancellor
Strategic Plan Chair
- **Marty Rosen**
Director of Library Services
Self-Study Co-Chair
- **Gil Atnip**
Vice Chancellor for Academic Affairs
Self-Study Co-Chair
- **Jenny Johnson Wolf**
Director of University Communications
Self-Study Steering Committee



About IU Southeast



- Indiana University
- Master's I
- 7,200 students
- 450 faculty and staff
- Limited on-campus housing



A little About You





Strategic Planning



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Strategic Planning



2005-09 Strategic Plan

- Inclusive process
- 7 major goals
- More than 200 initiatives
- 95% of all initiatives were completed, ongoing, or substantially in progress



Readings for Environmental Scan

- Census Bureau Demographic Information
- Enrollment Reports
- Campus Attrition Data
- Student Body Profiles
- Previous Planning Documents
- Indiana Commission for Higher Education Documents
 - “Blueprint for Policy and Planning Development in Higher Education”
- AGB Documents
- Brookings Institute Study for Greater Louisville
- Local Chamber’s Plan (SI20/20)
- STAMATS Information
- Greater Louisville Chamber’s Business Network Report
- Kentuckiana Works Planning Documents
- Indiana Regional Workforce Investment Strategic Plan
- Local K-12 Planning
- Continuing Student Surveys
- NSSE Results
- Best Practices Articles



Goal - # 5 IUS will define and enhance its image and raise its profile as a regional leader and resource center through strategic marketing and public relations.

Objective or Initiative	Priority	Description	Responsibility	Timeline		Assessment Methodology	Incremental Resources			Cross Reference	Note
				Begin (Year)	Complete (Year)		Estimated Costs (L,M,H)	Time Required (L, M, H)	Resource Assumptions		
5.1	1	Conduct research to establish baseline data (i.e., determine current image)									
5.1.1	1	Conduct focus groups and compile current data on perception of IUS.	VC/UA, Instit. Research	Year 1	Year 2	Completion of baseline image report.	Low	High	Use University Resources	2.9.2, 2.9.3, 3.3.9, 4.4.2, 7.4.2	If outsourced, \$40,000
5.2		Develop marketing, PR, communications campaign									
5.2.1	1	Create internal work group.	VC/UA	Year 1	Year 2		Low	Low		4.5.1	
5.2.2	1	Solicit campus success stories.	PR Spec	Year 1	Ongoing	Publication of success stories in IUS Times, local & regional media	Low	Medium		6.9.4	
5.2.3	2	Develop key communicators network.	VC/UA	Year 1	Ongoing	Group meets semi-annually to discuss progress	Low	Low	\$1,000 for postage, meeting expenses (food, beverages)		
5.2.4	2	Develop vehicles to keep key communicators informed	Mkt Asst., PR Spec	Year 1	Year 2		Low	Low	Mostly email and web-based communication	7.4.1	
5.2.5	2	Develop 30-second "elevator" speech.	VC/UA; Mkt Asst; PR Spec	Year 1	Ongoing		Low	Medium			Word-of-mouth "buzz" campaign
5.3		Develop advertising campaign									
5.3.1	1	Determine marketing messages	Chancellor; Cabinet; Mkt Asst; PR Spec	Year 1	Ongoing					2.2, 2.3, 2.4, 2.6	
5.3.2	1	Develop branding strategy.	VC/UA; Mkt Asst; PR Spec	Year 1	Year 1						
5.3.3	2	Create "testimonial" bank	Mkt Asst., PR Spec	Year 1	Ongoing		Low	Medium		6.9.4	
5.4		Develop media relations strategy									
5.4.1	2	Produce annual PR calendar of newsworthy events.	PR Spec	Year 1	Ongoing		Low	Low		4.5.1, 6.5.3, 6.5.4	
5.4.2	3	Maintain database of media contacts.	PR Spec	Year 1	Ongoing		Low	Low			
5.4.3	3	Schedule meetings of Chancellor with editorial boards.	Chancellor; VC/UA	Year 2	Ongoing		Low	Low			
5.4.4	3	Propose/write op-ed pieces.	Chancellor; VC/UA	Year 2	Ongoing		Low	Medium		4.5.1	
5.5		Expand speakers bureau and develop "campus representatives" program									
5.5.1	2	Maintain and expand "experts" list.	PR Spec	Year 1	Ongoing		Low	Medium		6.3.5	

Tracking Strategic Plan Success

GOAL 2: ENROLLMENT MANAGEMENT

OBJECTIVE OR INITIATIVE	RESPONSIBILITY	TIMELINE	ASSESSMENT	COST
2.1	EM Committee, Deans, & Cabinet	Year 1 (fall '04)	Optimal size and profile report	Personnel/Time
2.2.1	Admissions	Yr 1 (Development) Yr 2 (Implementation)	Plan is implemented (measure in Yr 3). Does Plan achieve Objective 2.1?	TBD
2.2.2	Admissions and Continuing Educ.	Yr 2	# of partnerships and # of students	Salary for new off-site faculty
2.2.3	3 Grad. Prog. Coord.	Yr 1	# of grad. students from Ivy Tech and JCC personnel ranks	Time and postage
2.2.4	VC Academic Affairs and Deans	Yr 2	Decision and written plan	Time and faculty
2.2.5	Admissions	Yr 1	# of contacts made by current students	Student Ambassadors
2.2.6	3 Grad. Coord., Deans, R. Burch	Yr 1	Graduate recruitment plans (3) and marketing plan for each	Publications, marketing, postage
2.2.7	Continuing Educ.	Yr 3	# of partnerships and students and satisfaction surveys	Adjunct faculty costs
2.2.8	VC Student Affairs and VC Technology	Yr 2	Completion of Welcome Center	Library Renovation Budget
2.3.1	EM Committee, Inst. Research, G. Roberts	Yr 1	Data Analysis Report	Time
2.3.2	Student Recruitment & Retention Com. and G. Roberts	Yr 2	Established goals and retention plan	Time
2.3.3	Asst-VC- EM and G. Roberts	Yr 2	Retention Report	Time
2.3.4	Career Services and Volunteer Coord.	Yr 1	Report of services and programs	Time
2.4.1	Asst-VC-EM	Yr. 1	Communications Plan is implemented	Time, Postage
2.4.2.	R. Burch & Asst-VC-EM	Yr. 1 Plan, Yr. 2 Implementation	Marketing Plan developed yr. 1; implemented yr. 2	(1) time; (2) marketing

Tracking Strategic Plan Success

Indiana University Southeast - Strategic Plan Reporting Template

Goal 2 Enrollment Management

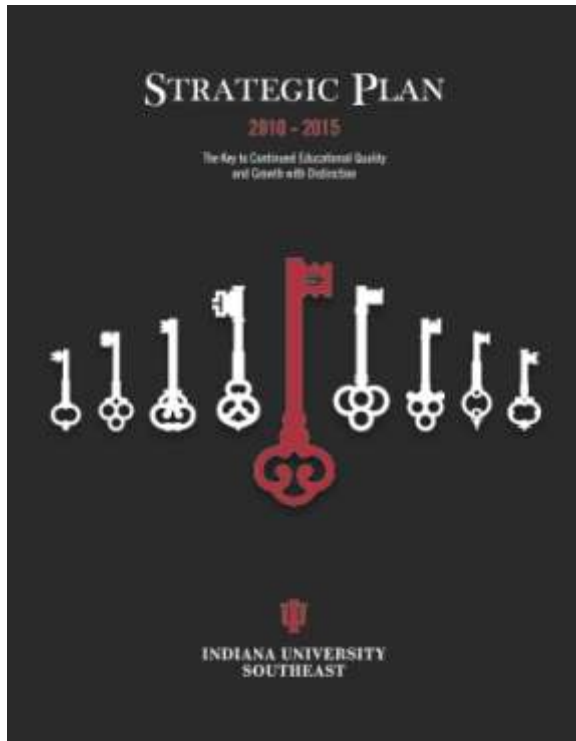
Objective or Initiative	Description	Responsibility	Projected Completion	Status	Anticipated Costs	Comments
2	IU Southeast will develop an up-to-date, data-driven enrollment management program, which will provide a sustainable enrollment base and enhance student retention and persistence to graduation.		3	In Progress	\$55,000	A three-year (2007-2010) enrollment management plan will be completed by April 2007.
2.1	Determine its optimal size	EM Committee (data) & Campus Leadership Team		Completed		Increase total enrollment by 50 each year (2007-2017) to reach previous record of 6700 students.
2.2	Develop comprehensive recruitment plan					
2.2.1	Develop comprehensive recruitment plan	Admissions		Completed & Ongoing		Seventeen new recruitment initiatives were implemented in 2005-06. New admissions criteria established, territory management plan, ongoing tracking of prospects and applicants, Evening with the Chancellor programs, Financing Your Future, developed IM mechanism, targeted veterans.
2.2.2	Establish business partnerships	Admissions & Continuing Educ.		Completed & Ongoing		Bursar re-instituted the Earn & Learn program with UPS. Developed Fee Remission Employer Deferment program.
2.2.3	Recruit from JCC & Ivy Tech	Transfer Specialist		Completed & Ongoing		Transfer student enrollment has increased 27% (+142 students) from 2004-2007.
2.2.4	Investigate merits of dual credit programs	Asst. VC-EM, VC Academic Affairs & Deans		Completed & Ongoing		ACP Program--8 classes started in 2005-06 (80 students), 12 classes in 2006-07 (106 students), and Bridge to College in progress.

File: STRATEGIC PLAN GOAL 2 REPORT 2-07.xls
Prepared by Student Affairs 2/2007

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Tracking Strategic Plan Success

Strategic Planning



2010-15 Strategic Plan

- Continuation of previous
- Inclusive process
- Debuted Feb. 2010
- 8 major goals
- Nearly 250 initiatives



Strategic Planning Process

- Inclusive process
- Environmental scan and SWOT analysis
- Living document
- Tying to budgets



From the Reviewers

“

The transparent and inclusive strategic planning process has resulted in widespread acceptance of the plan among all sectors of the campus.

”





The Self Study



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Self Study Goals

- Document significant areas of change and progress (including strategic planning)
- Identify issues
- Contribute to strategic plan rollover
- Get reaccredited with no major areas of concern!!



Why Link Self Study with Planning?

- Goals are similar: forward looking
- Share information and ideas
- Make best use of human resources
- Involve more people on campus than either process alone



Accreditation
Co-Chair

Accreditation
Co-Chair

Steering Committee

Chair

Chair

Chair

Chair

Chair

Working
Group

Working
Group

Working
Group

Working
Group

Working
Group

Criterion
1

Criterion
2

Criterion
3

Criterion
4

Criterion
5

Structure

Overlapping Resources

- The Self Study committee had 45 members
- Strategic Planning committee had 36 members, including the Chancellor
- 12 individuals served on both



Self-Study Strategic Initiatives

Draft, September 14, 2009

Core Component 1a: The organization's mission documents are clear and articulate publicly the organization's commitments.

- IU Southeast will pursue continuation of the Indiana-Kentucky tuition reciprocity agreement and propose the inclusion of additional Kentucky counties in the agreement.
- IU Southeast will review the impact of changes in Indiana's Core 40 high school graduation requirements on admissions criteria, redesign of the student outreach programs, course placement processes, and developmental offerings.

Sharing of Information

Core Component 1c: Understanding of and support for the mission pervade the organization

- IU Southeast will continue to promote staff, faculty, and student awareness of the institution's mission, vision, and values.
- IU Southeast will resolve the issue of the selectivity of its admissions standards and practices.

Core Component 1e: The organization upholds and protects its integrity.

- IU Southeast will insure that its presentation to the public with regard to the flexibility of its course offerings is accurate both by promoting the use of flexible scheduling to allow students to complete degree programs at night and on weekends and by insuring that its marketing materials accurately reflect the options available to students.

Core Component 2a: The organization realistically prepares for a future shaped by multiple societal and economic trends.

- IU Southeast will determine enrollment goals based on consideration of the capacity of its facilities and its personnel and financial resources.

*Self-Study Strategic Initiatives
document distributed to Strategic
Planning Committee*

From the Reviewers

“

Interviews affirmed that the campus community, faculty, staff, administration and students were highly involved in the Self-Study process.

”





The Process

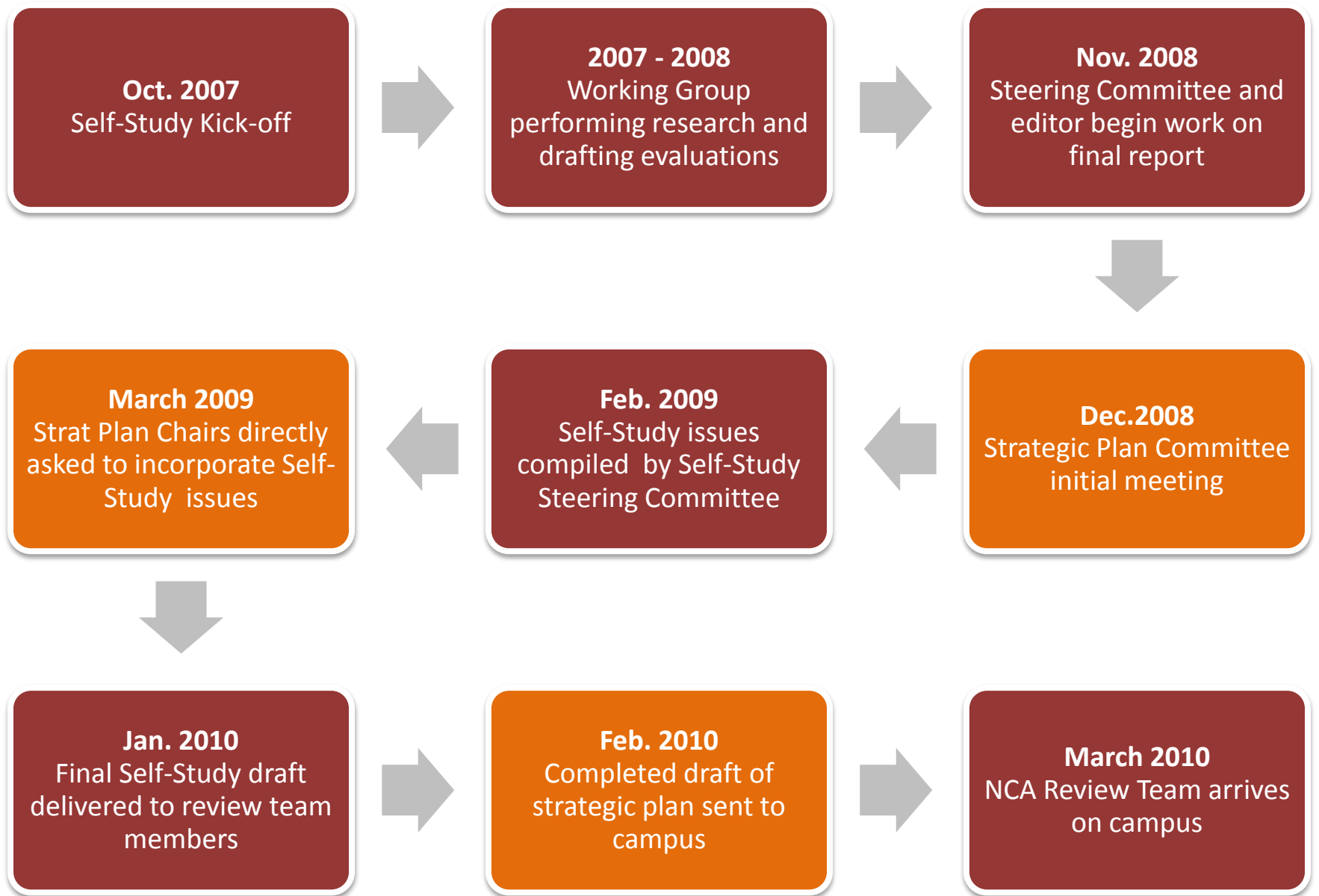


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Process

1. Timing
2. Candor & Language
3. Buy-in





Timeline

The Power of Language

Does your institution have

- Weaknesses
- Issues
- Challenges
- Opportunities

At IU Southeast, we discovered our
Strategic Initiatives.



Tying the Two Together

**IU Southeast 2010 NCA
Re-accreditation Self-study**

Core Component 3

- The organization's goals for student learning outcomes are clearly stated for each educational program and make effective assessment possible.

**IU Southeast Strategic Plan,
2010-2015**

Strategic Objective 1.1

- IU Southeast will continue to refine and strengthen its processes for systematic assessment... and to use the information derived from assessment to improve student learning.



Tying the Two Together

Self-study Core Component 3

- IU Southeast will continue to strengthen feedback loops within academic program assessment to assure that assessment results are consistently reviewed by all appropriate parties and to document the impact of changes on student learning.

IU Southeast Strategic Plan

- Initiative 1.1.1: Continue to strengthen feedback loops in assessment processes, both in academic programs and in general education by focusing consistently and clearly on the measurable impact of programmatic changes on student learning.



Candor

Strategic planning forces us to be positive and find solutions, whereas historically accreditation has been more critical.

According to the student survey, 76 percent of the undergraduate students and 48 percent of the graduate students who responded were not sure if their school or program had a mission statement.

Students also were asked about how well the mission statement guides decision making. Seventy-three percent of the undergraduates and 69 percent of the graduate students agreed that the mission statement guides decision making at IU Southeast. Notable percentages of each group - 17 percent of undergraduates and 29 percent of graduate students - indicated that they did not know.

The formal mission statement can be found in several documents used by faculty, staff, and students. These include the *Faculty Manual*, the *IU Southeast Bulletin*, the *IU Southeast Student Planner*, and on the University's Web site. The survey results reported above suggest that the University and its units should increase their efforts to communicate their formal mission statements to all stakeholder groups, but especially to students and part-time faculty members. Communication should also include periodic updates about how mission statements are being used to guide decision making at all levels.

ADMISSIONS STANDARDS AND PRACTICE

The evidence indicates that there is widespread understanding of and support for the mission of IU Southeast among its key constituencies. The one area that is directly related to mission in which there is not a broad consensus involves admissions standards. The lack of consensus is reflected by responses of the full-time faculty in the 2008 survey to a question about their satisfaction with "recruitment of new students." Of those who expressed an opinion, 42 percent indicated they were satisfied, 26 percent indicated they were dissatisfied, and 32 percent were neutral. It is also noteworthy that nearly 20 percent of the survey respondents did not choose to express an opinion on this particular question.

It was noted above in the discussion of the state context that the regional campuses of Indiana and Purdue Universities served many of the functions of community colleges until the late 1990s, when the state decided to convert Indiana Vocational Technical College into a full-fledged community college. As a result of its mission to provide access to educational opportunity within its community, IU Southeast essentially had an open admissions policy during most of its existence. That began to change with the establishment of the community college and has accelerated somewhat as a result of the Mission Differentiation Project and the Indiana Higher Education Commission's exploration of new ways to realign the state's higher education system.

IU Southeast still has a liberal admissions policy in that it accepts approximately 87 percent of the students who apply as beginning undergraduates and almost 80 percent of those who apply as transfer students. However, the issue of what the admissions standards should ultimately be is not resolved at this time. Some members of the campus community believe that the standards should return to essentially open admissions. Others want the standards to be more selective, and still others think that the standards are about right as they are. Consideration of the issue is complicated somewhat by unanticipated enrollment increases in the past two years that have begun to challenge the capacity of the campus to accommodate students who want to attend. In lieu of directly changing admission standards, faculty recently

Strategic Initiatives

Admissions standards COPY HERE...

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The following strategic initiatives will further enhance understanding of and support for IU Southeast's mission across the campus:

- * IU Southeast will continue to improve internal communication about the campus' mission, vision, Core Values, and strategic goals, using strategies that are responsive to the differences among full-time faculty and staff, part-time faculty, and students in levels of institutional awareness and commitment.
- * IU Southeast will resolve the issue of the selectivity of its admissions standards and practices.

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Creating Campus Buy-in

The IU Southeast **mission** at work:
Preparing Students



One graduate at a time.

Ψ
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Communication Strategy

- Focus on accreditation, plus mission & vision
- Get the campus community's attention
- Use existing campus structures
- Ensure faculty & staff feel like participants in the process, not bystanders
- Simplify. Repeat.



Tools

- Mission, vision, and core values posters
- Email newsletters
- Presentation at staff meetings for all schools and departments
- Accreditation website



From the Reviewers



The document was well written, candid in its approach, and contained thoughtful evaluation of the institution. The team commends Indiana University Southeast for engaging in a process that has already led to improvement and has connections to the strategic plan. This process, in addition to the strategic planning process, has clearly assessed the institution in ways that will lead to further improvement.





Takeaways



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Three things to remember

1. Goals of self study and planning are compatible – both are forward looking. Linking them is worthwhile, whatever the timing.
2. Makes best use of resources, especially people's time and energy
3. Increases campus involvement and promotes culture of self evaluation



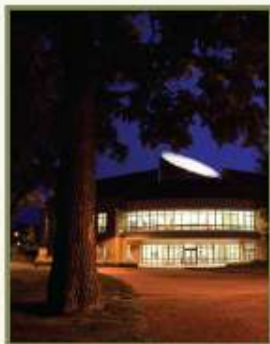
Questions?

You can download the
entire presentation at
ius.edu/HLC_Public



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SELF-STUDY REPORT 2009



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