

STRATEGIC PLAN INDIANA STATE UNIVERSITY

Project Goal

Facilitate a planning process that results in a Strategic Plan that will guide the future of Indiana State University, with particular emphasis on strategies for advancing the University's strategic priorities:

- Enrollment and retention
- Defining potential University/community partnerships
- Leveraging academic programs that have been identified as national or regional programs of strength or promise
- Advancing experiential learning
- Institutionalizing community engagement
- Expanding contract and grant funding
- Recruiting and retaining top faculty

Guiding Principles

The process will:

- Be open and collaborative
- Involve all stakeholders: staff, faculty, students, administration, community
- Be mindful of the academic calendar while maintaining a work schedule that will complete the project by the end of August 2009
- Build on work already done and, at the same time, be creative
- Utilize existing committees of the University
- Keep individuals informed and provide opportunities for involvement
- Take into account the Indiana Commission of Higher Education Strategic Plan

Project Requirements

- Project Advisory Committee to provide advice and feedback through the process
- University Liaison to schedule meetings, coordinate logistics and act as a point of contact between the consulting team and the University.
- Web Page for posting the project goal, work plan, schedule, agendas and minutes of meetings. STRATUS will take responsibility for preparing text for the web page, but will require assistance in establishing it and posting the text on the University's web site.

Work Plan

As indicated in the guiding principles, the work plan will build upon previous studies to avoid duplicating activities that have already been completed. Also, while tasks are listed in sequence, some will be conducted simultaneously.

Phase One: Project Preparation and Refinement (December 2008)

There will be a meeting with the President and three project preparation meetings:

- President's Cabinet
- Project Advisory Committee
- A group comprised of members of the executive staff; deans; academic and administrative department heads and representatives of the faculty, staff and student governance bodies
 - This session will place particular emphasis on aligning the strategic planning process with the process established for the special emphasis visit by the North Central Association in late Fall 2010

A meeting with the land-use planning team will also be held to:

- Review the two work plans
- Identify key planning elements (e.g., enrollment projections of growing programs and services; elements of the physical environment impacting the student experience; etc.) that the land-use planning team will need from the strategic planning process in order to complete its work.
- Identify points of intersection, where one planning process will impact the other, and develop appropriate timelines so that information is in hand when needed.
- Determine whether or not it is possible to include representatives of each planning team in selected activities of the other in order to enhance communication and the effectiveness of the overall planning process and to minimize redundancy for the University community.

Phase Two: Strategic Research — (December - January)

The purpose of Strategic Research is to gain a clear understanding of the institution and its external environment.

Document Review

The consulting team will review key documents that relate to the planning process, including:

- Existing Indiana State University planning documents, e.g.,
 - Strategic
 - Physical
 - Financial
 - Technology
 - Marketing
 - Advancement
 - Background materials related to the University's strategic priorities
- Most recent North Central self study and the North Central report
- Work done in response to the last North Central recommendations
- Catalog
- Organizational structure
- 2008 Plan of the Indiana Commission for Higher Education — "Reaching Higher: Strategic Initiatives for Higher Education in Indiana"

- Special studies and reports to the Commissioner's Office and State that communicate the needs of the University
- Documents that describe the University's governance, consultative and decision-making process
- Statistical Fact Book
- State reporting requirements and deadlines with which the University must adhere
- Other documents identified in Phase One

Internal Scan

Using existing data, identify trends on enrollment, faculty, staff and other factors related to the University's strategic priorities. Hold interviews with selected groups of faculty, staff, students and trustees (if appropriate) to identify ideas, opportunities and initiatives related to the University's strategic priorities.

Environmental Scan

Using existing data, identify external factors and trends related to the University's strategic priorities. Hold interviews with selected groups of faculty, staff, students, alumni and trustees to identify ideas and initiatives related to the University's strategic priorities.

Targeted Research

Studies on specific issues and questions of particular importance to the University's strategic priorities.

Competition Analysis

Studies of selected competitors and aspirational peers to determine where they stand relative to the University's strategic priorities.

Upon completion, the research findings will be synthesized and summarized.

Phase Three: Option Development — "Charting the Course" (February, March)

The results of the Strategic Research will be connected in creative ways to identify ideas and initiatives that can advance the University's strategic priorities and lead to distinction and competitive advantage.

Existing University statements on Core Commitments, Vision and Mission will also be reviewed, and changes suggested, if necessary.

The strategies, which could include new programs, services, partnerships and facilities, and the Core Commitments, Vision and Mission, will be presented to the Project Advisory Committee for its advice and counsel.

Project Advisory Committee Retreat

The STRATUS team will hold a one-day retreat, involving the Project Advisory Committee and members of the executive staff; deans; academic and administrative department heads and representatives of the faculty, staff and student governance bodies.

The purpose of the retreat is to:

- Share the results of the strategic research
- Express the strategic priorities as strategic planning goals
- Describe how its findings led to the formation of the draft objectives and strategies to advance the University's strategic priorities, i.e., the University's goals
- Identify the metrics by which progress toward achieving the goals and objectives will be measured
- Provide participants the opportunity, in small and large groups, to discuss what has been presented and make suggestions

Phase Four: First Draft and Consultation (April - Early May)

The consulting team will create the first draft of the Indiana State University Strategic Plan and present it to the members of the Project Advisory Committee. Following this and incorporating the suggestions of the Project Advisory Committee, the participants in the retreat will be invited to an open forum where the draft plan will be presented and discussed.

Phase Five: Identify Space Implications (June)

Land-use and strategic planning will be taking place simultaneously and work plans will be coordinated so that needed information will be exchanged on a regular basis. Beyond this, however, there will be a chapter in the Strategic Plan that summarizes the physical implications of the plan — specifically, the kinds of buildings, spaces and physical planning principles that will be needed to help realize the plan.

Phase Six: Funding and Implementation Strategies (June)

Following Phases One through Five, STRATUS will use the selected funding tools to identify potential sources of financing for the programs, partnerships, special initiatives and projects identified in the Strategic Plan. This will include consultation with the Indiana State University Grants and Contracts office and the ISU Foundation office.

We will also examine any proposed partnerships and projects for opportunities for creative, third-party financing.

Finally, STRATUS will examine the strategies in the plan and the University standing committees to recommend:

- The most effective standing committees or special task forces necessary for carrying the objectives and strategies in the planning document to reality.

- The most effective timing for implementing the objectives and strategies by the standing committees and task forces.

Phase Seven: Final Report and Project Deliverables (July - August)

The results of Phases Four through Seven will be taken into account, and a final draft of the Indiana State University Strategic Plan will be developed.

The final project deliverables would include a PowerPoint presentation of the Indiana State University Strategic Plan that can be used to communicate its contents on-campus, and to Trustees, donors and other stakeholders.

STRATUS will be available, as needed, to assist the University in making presentations to the Board of Trustees and other groups.