

Simultaneous Self Study and Strategic Planning: A Case Study

Dale J. Jaffe, Ph.D.

Associate Provost for Planning and Assessment
University of Vermont

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The Issue – integrating simultaneous self study with strategic planning

A good idea?

- Efficient (avoid duplicative effort)
- Effective (combined power of two large campus-wide processes)

Forces of Divergence/Sources of Tension

- Goal – comprehensive vs. narrow, targeted focus
- Scope – breadth vs. depth
- Frame of reference – standards and projections vs. goals and action plans
- Evidence – multiple indicators of institutional effectiveness vs. dashboard
- Audience – external vs. internal
- Vehicle – standards subcommittees vs. university planning council

The UVM Context

- 1999 decennial reaccreditation
Focused self-study with strategic planning created 2000 Strategic Action Plan
- 2002 arrival of President Daniel Mark Fogel
Elaboration of 2000 document: vision statement with 7 goals plus action plans (2003-2008)
Supplemented with supporting plans – financial, capital, campus master plan
Annual Reports of Action Plan Progress
- 2007 Self-study Steering Committee and reconstitution of University Planning Council
- 2009 NEASC site visit and launch of Revised Strategic Plan

Strategies for mutual influence to enhance convergence and integration

Structural bridges

- Associate provost position
- Overlapping membership
- Representational membership of groups within the University



Strategies for mutual influence to enhance convergence and integration

Processual bridges

- Shared data requests
- Key meetings – Self study kickoff, UPC retreat, President's Senior Leadership Retreat, Presentation of action ideas and projections



Outcomes

Uses of Strategic Planning Work for the Self Study

- The momentum of the strategic planning process carried over to the self study, imbuing it with more meaning than would have been the case had the self study proceeded on its own.
- Strategic plan performance indicator work provided a model for "evidence-based assessment" required for the self study.
- The need for data in a form that could inform strategic planning led to the concept of the "Assessment Report," a 50-page appendix to the self study in which patterns in the assessment data from five studies are summarized.



Outcomes

Uses of Self Study Work for Strategic Planning

- Campus focus group themes informed objectives associated with the new goal statements.
- Assessment of Academic Program Review created APR revision as a strategic objective.
- Assessment of learning outcomes prompted conversations regarding "a distinctive UVM education."
- Assessment of campus services and offices helped form new strategic goal of institutional efficacy.
- Institutional effectiveness perspective of self-study led to strategic plan performance indicators being developed at the outset of the new plan.



Issues – maintaining interconnectivity of simultaneous and parallel processes

- Coordinated pacing given different methodologies
- Data reduction
- Participant burnout and meeting fatigue
- Consistency of authorial voice across narratives
- Impact of unanticipated internal and external events
 - New or More constraints = Increased focus in both documents
- Reconciliation of output
- Seamless integration at the implementation stage