Strategic Planning & IE:
Creating a System that is Comprehensive, Integrated, and Ongoing

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Today’s Learning Outcomes

• Participants will be able to describe strategic plans that are comprehensive in scope within the context of their institutions.

• Participants will be able to identify strategies for developing integrated plans that connect institutional outcomes to department-level objectives and budgeting, and generate buy-in and engagement from campus stakeholders.

• Participants will be able to adapt an annual assessment reporting process that engenders accountability and demonstrates evidence of an ongoing strategic planning process.
Institutional Context: Southeastern University

• Founded as a Bible College in 1935
• Christian Liberal Arts institution in Central Florida
• 70 UG programs and 32 Graduate programs
• Began doctoral programs in 2014
• 2,500 total headcount in 2011; nearly 10,000 in 2019
• Rapid expansion of graduate, online, and extension site programs and deliveries
Experience with Strategic Planning

- Have you been or are you now directly involved in the production, maintenance, or assessment of strategic plans at your institution?
- Is the first strategic planning effort by your institution? Are you several iterations into the process?
- Does your regional or disciplinary accreditor require a strategic plan?
- What does the process of strategic planning look like at your institution? Who is involved? What are the parameters?
Experience with Strategic Planning

• Do you assess or update your strategic plan’s initiatives on an ongoing basis?
• To what extent are your institution’s divisions, departments, programs, and offices’ own outcomes integrated into the plan and its assessment?
• How do you make the plan and its assessment visible to stakeholders across the institution?
• What web based/software solution are you using to manage your strategic planning processes?
Context for Strategic Planning

- 2012-2017 Strategic Plan
- Comprehensive stakeholder data collection
- Six strategic outcomes, 100 supporting initiatives
- Aligned with university mission/vision
- Initiative “champions”
- Budgets
- Final 2017 Report
2012 University Strategic Plan - Strengths

5 year plan
- Aligned to University Mission
- Comprehensive across institutional operations
- Objectives and initiatives with budgetary estimates and "champions"
2012 University Strategic Plan - Strengths

- Not completely integrated with departmental outcomes
- Disconnected from annual assessment reporting
- Progress updates generated by IE office
- Budgets not always reflected in formal budgeting process
The institution engages in ongoing, comprehensive, and integrated research-based planning and evaluation processes that (a) focus on institutional quality and effectiveness and (b) incorporate a systematic review of institutional goals and outcomes consistent with its mission.

SACSCOC POA Section 7.1 [CR]
Comprehensive Strategic Planning
Development of the 2017-2022 Strategic Plan

- Extensive Research & Data Gathering
- Codified University Aspirations into 7 Missionally-Aligned Outcomes
- Supporting Objectives

- Supporting Initiatives
- Budgets, Champions, Timelines
2017-2022 Strategic Plan

Our Five Year Plan

We create a university of remarkable co-curricular experiences with a balance of educational, student development, strong financial basis, and a culture of high performance and quality.

Curricular Excellence

1. Enhance faculty and student engagement.
   - Develop a faculty/student engagement and research initiative.
   - Improve the student-faculty ratio.
   - Create more interdisciplinary courses that align with teaching/learning interests and enroll age on career opportunities.
   - Expand faculty and learning communities, e.g., Brown.
   - Double the number of online courses offered by fall 2018.

2. Enhance the university’s commitment to liberal arts.
   - Create a thematic year curriculum that meets AACU learning outcomes.
   - Develop a student-centered course of study that promotes career experience in alignment with AACU mission.
   - Provide for distinct learning experiences, and is tailored to each student’s area of emphasis.
   - Hire full-time undergraduate co-curricular director for a traditional program.

3. Enhance undergraduate learning opportunities in core classes and public forums.
   - Enhance student and faculty opportunities in national, regional, and local conferences attendance.
   - Increase exposure to course offerings and degree programs in foreign language fulfills to academic programs.
   - Enhance experimental learning opportunities in both global and local contexts.

4. Enhance support for academic excellence at all colleges and departments.
   - Expand funding for library resources.
   - Strengthen the Linkage Program Langevin Research.
   - Expand and support the Center for Baltic Studies.
   - Phased national and international endeavors (ACM, IEEE, IRE, and OAB).
   - Launch new Ph.D. program.

Co-curricular Excellence

1. Enhance curricular and co-curricular opportunities in national, regional, and local conferences attendance.
2. Enhance student and faculty opportunities in national, regional, and local conferences attendance.
3. Enhance student and faculty opportunities in national, regional, and local conferences attendance.
4. Enhance student and faculty opportunities in national, regional, and local conferences attendance.
5. Enhance student and faculty opportunities in national, regional, and local conferences attendance.

Diverse & Expanding Student Population

1. Enhance and diversify our student body.
2. Enhance and diversify our student body.
3. Enhance and diversify our student body.
4. Enhance and diversify our student body.
5. Enhance and diversify our student body.

Strong Financial Base

1. Enhance and diversify our student body.
2. Enhance and diversify our student body.
3. Enhance and diversify our student body.
4. Enhance and diversify our student body.
5. Enhance and diversify our student body.

Culture of High Performance & Quality

1. Enhance and diversify our student body.
2. Enhance and diversify our student body.
3. Enhance and diversify our student body.
4. Enhance and diversify our student body.
5. Enhance and diversify our student body.

Undergraduate Education

1. Enhance and diversify our student body.
2. Enhance and diversify our student body.
3. Enhance and diversify our student body.
4. Enhance and diversify our student body.
5. Enhance and diversify our student body.
Department Support of Plan

SUPPORTING DEPARTMENTS

While the “Champions” listed in the preceding pages will spearhead their associated initiatives, every office and department at Southeastern University has developed goals in support of the University’s Strategic Plan. These departments are listed below under the larger objectives they are supporting.

1.1 Enhance faculty and student engagement.
   - Barnett College of Ministry and Theology
   - College of Arts & Media
   - Jannetdes College of Business & Entrepreneurial Leadership
   - College of Behavioral & Social Sciences
   - College of Natural & Health Sciences
   - College of Education
   - Honors Program
   - Career Services
   - Library Services

1.2 Enhance the university’s commitment to Liberal Arts.
   - Barnett College of Ministry and Theology
   - College of Arts & Media

1.3 Increase participation in experiential learning.
   - Jannetdes College of Business & Entrepreneurial Leadership
   - College of Behavioral & Social Sciences
   - College of Arts & Media
   - College of Natural & Health Sciences
   - College of Education
   - First Year Experience
   - Honors Program
   - Discipline & Monitoring
   - Career Services

1.4 Enhance support for academic excellence in all colleges and departments.
   - Barnett College of Ministry and Theology
   - College of Behavioral & Social Sciences
   - Jannetdes College of Business & Entrepreneurial Leadership
   - Institutional Effectiveness
   - Library Services
   - Academic & Center for Enrichment

2.1 Improve FYE.
   - Campus Wide Events
   - Academic Advising
   - Academic Center for Enrichment
   - First Year Experience
   - Title IX
   - Information Technology
   - Career Services
   - Barnett College of Ministry and Theology

2.2 Empower and Support Students.
   - Career Services
   - Engage Destinations
   - Athletics
   - Library Services
   - Health & Wellness
   - Barnett College of Ministry and Theology
   - College of Education
   - Campus Wide Events
   - Portico Coffeehouse
   - Honors Program
   - Academic and Auxiliary Services
   - Information Technology
   - Discipline & Monitoring
   - Academic Center for Enrichment

2.3 Increase Student “Fit” and Satisfaction.
   - Career Services
   - Campus Mailroom
   - Campus Card
   - Counseling
   - Housing
   - Health & Wellness
   - Athletics
   - Discipline & Monitoring
   - Title IX
   - Academic and Auxiliary Services
   - Academic Center for Enrichment
   - Safety & Security
   - Portico Coffeehouse
   - Library Services
   - Barnett College of Ministry and Theology
   - Media Services
   - Student Financial Services
2017-2022 Strategic Plan - detailed

1. LEADERSHIP & Effectiveness

2. Enhance the University's academic excellence in all colleges and departments.
   - Increase endowment for library resources.
   - Continue growth in the academic programs offered.
   - Increase research expenditures to support academic missions.
   - Increase the number of international students.
   - Increase the number of faculty and staff in key areas.

3. Enhance the student experience in all colleges and departments.
   - Increase the number of full-time faculty members.
   - Increase the number of graduate programs.
   - Increase the number of Ph.D. programs.
   - Increase the number of academic programs.

4. Enhance support for academic excellence in all colleges and departments.
   - Increase funding for library resources.
   - Increase funding for academic programs.
   - Increase funding for academic programs.
   - Increase funding for academic programs.

5. Increase student success and retention.
   - Increase the number of students enrolled.
   - Increase the number of graduate students.
   - Increase the number of full-time faculty members.
   - Increase the number of academic programs.

6. Increase the number of international students.
   - Increase the number of graduate programs.
   - Increase the number of academic programs.
   - Increase the number of academic programs.

7. Increase the number of full-time faculty members.
   - Increase the number of graduate programs.
   - Increase the number of academic programs.
   - Increase the number of academic programs.

8. Enhance the student experience in all colleges and departments.
   - Increase the number of full-time faculty members.
   - Increase the number of graduate programs.
   - Increase the number of academic programs.
   - Increase the number of academic programs.

9. Enhance the student experience in all colleges and departments.
   - Increase the number of full-time faculty members.
   - Increase the number of graduate programs.
   - Increase the number of academic programs.
   - Increase the number of academic programs.

10. Increase support for academic excellence in all colleges and departments.
    - Increase funding for library resources.
    - Increase funding for academic programs.
    - Increase funding for academic programs.
    - Increase funding for academic programs.
Integrated Department-Level Planning
Integrating Plan into departmental operations

• Communicated the Strategic Plan to University stakeholders

• Guided department-level strategic planning

• Master Plan of Advance (MPA)

• Mapped Dept. Plans to University Plan with Software Solution

• Communicated MPA > Strategic Plan relationships to relevant stakeholders
Mapping/Tracking Institutional/Departmental Plan Relationships in Campus Labs Planning
Mapping/Tracking Institutional/Departmental Plan Relationships in Campus Labs Planning

<table>
<thead>
<tr>
<th>Objective Number</th>
<th>Name</th>
<th>Start</th>
<th>End</th>
<th>Progress</th>
<th>Providing Department</th>
<th>Objective Description</th>
<th>Action Plan</th>
</tr>
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<tbody>
<tr>
<td>1.1</td>
<td></td>
<td>07/01/2018</td>
<td>05/31/2019</td>
<td></td>
<td>Southeastern University</td>
<td>Enhance faculty and student engagement</td>
<td>1.1.1 Develop a faculty/student undergraduate research initiative. 1.1.2 Improve the student-to-faculty ratio. 1.1.3 Create more interdisciplinary courses that align with teaching/learning interests and encourage co-teaching opportunities. 1.1.4 Engage professional learning communities, e.g., TBL. 1.1.5 Reduce the number of online courses completed by traditional students.</td>
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</tbody>
</table>
Mapping/Tracking Institutional/Departmental Plan Relationships in Campus Labs Planning
Mapping/Tracking Institutional/Departmental Plan Relationships in Campus Labs Planning
Ongoing Assessment & Improvement Processes
Annual Assessment & Continuous Improvement

- Annual assessment reporting
- Compliance and quality enhancement in assessment reporting
- Power BI dashboards
- Annual University Strategic Plan updates
- Sharing updates relevant stakeholders
Annual MPA Assessment Reporting

Edit Plan Item

Template: ADMINISTRATIVE OUTCOME

Outcome: Number
This is an auto-generated number for the outcome.
1.0

Outcome: Title
Provide a title for the administrative outcome. The title should be measurable and measurable with real, objective measures.
Student Focused

Outcome Description
Provide a detailed description of the administrative objective.

We will provide a student-focused co-curricular experience to support as they develop a academically, socially, and spiritually.

University Goal
2. CO-CURRICULAR EXCELLENCE
- 2.1 Prepare faculty and staff to effectively engage with generation Z & NEXT students through research and training.
- 2.1.1 Update the student advising model with a strengths-based approach.
- 2.2.2 Experiential learning opportunities and students meeting the needs of today's student.
- 2.5 Increase participation in experiential learning experiences (see 1.3).
- 2.5.1 All academic departments create strategies and measures including them to meet minimum 75% retention goal by 2023.
- 2.6.6 Select 2.5.1 & 2.5.2 / 2.6.3 increase students in their chosen major and support in years 3 and 4.

Budgetary Implications: Hospitality ($15,000-$15,000)

Outcome Start
Administrative assessment plans reflect a three-year calendar for three fiscal years.
07/01/2018

Outcome End
Administrative assessment plans reflect a three-year calendar for three fiscal years.
06/30/2021
Outcome: Overall Progress

Please provide an estimate on what percent of the overall outcome has been completed.

40%

Outcome: Status

On Track – adequate progress is being made; on time completion expected H2H – If minor adjustments are not made completion will be delayed O-Track – If adjustments are not made, completion will not be possible.

On-Track

Assessments and/or Action Plans

Indicate in narrative format the assessments or action plans for this administrative outcome. If your outcome is measuring improvement, indicate the type of assessments, either qualitative or quantitative. If your outcome establishes a project goal, indicate the specific path of action for ensuring the project is successful. An assessment results or action plans are completed update the list to reflect those activities. This should reflect action taken and results obtained.

1.1 Strive for a Student Satisfaction rating of 80% or higher across all services. On-site tutoring services will be surveyed at point of service and additional opportunities for providing feedback about general services will be developed and implemented in the 2017-2018 assessment cycle.

1.2 Offer services and activities that are responsive to the needs of today's student. Data collected through the center will be analyzed and used to identify developing trends and student requests at the end of each major term.

1.3 Implement the university's strategic plan to meet the academic and learning needs of students from underrepresented populations (first generation, minority, adult learners, online students, and etc.).

1.4 Implement Strengths Based Advising
Annual MPA Assessment Reporting

1.1 Students reported that they strongly agree/agree 95%-98% across all measures of student satisfaction in the Point of Service survey. This survey is administered to all students that utilize tutoring services. The alternative point of service survey instruments were not implemented in the 2017-2018 year due to not having the clock system implemented. There are plans to obtain the technology in the 2018-2019 fiscal year and the software for administering the survey has been integrated with center services.

1.2 Data is collected and reviewed on daily, weekly, monthly, and an annual basis. Due to the increase in center visits in the Fall 17 semester, ACE secured 4 classrooms to be used for overflow space and workshops.

Additionally, secondary reception staff was scheduled for Thursday evenings, the night with the highest volume of traffic. Men's Soccer Study Hall program also adjusted its requirements to allow its student-athletes to attend during any hours of operation and this provided substantial relief to the general flow in the center. Spring reports indicate that center traffic will not be significantly decreasing so strategies for securing additional space (classrooms, library) are being reviewed.

1.3 The university initiated the beginning stages of developing the strategic plan through its partnership with Credo. Currently, the university is in an assessment phase and task forces begin meeting in the Fall of 2018.

1.4 While Strengths Based Advising has not yet been launched campus-wide, the center has already begun examining its pedagogical practices in light of Strengths Based Advising, Thriving Student, and Positive Psychology approaches for the learning and academic coaching and counseling. Additionally, Dr. Laurie Schaschke, a leading expert in the field of Strengths Based Advising, will be presenting to the university in the fall.

Linked Documents:
There are no attachments.

Plan Item Files

- 2017-18-ACE-Survey (1).pdf
- Center Usage by Hour SP18 - Color Code.pdf
- Monthly Report Calculations.xlsx
- Monthly Reports-20180531T195549Z.001.zip
- Types of Reports.docx
Annual MPA Assessment Reporting

1.1 Students reported that they strongly agreed/agreed (44%) versus a total of 41% of students who scored those two scores on the main campus participants in completing the post-service survey. On average, participants received additional training at the front reception for delivering the post-service survey or answering 44% of respondents who had used Briefly sessions would recommend the service to a friend. 24% of students who had used brief sessions had completed the satisfaction survey. The originally planned additional post-service survey instrument was not implemented in the 2018-19 fiscal year. For the 2019-20 fiscal year, the service has been reviewed and updated. However, social media platforms were used to develop additional services for obtaining student feedback and engagement. Identifiers were found to be the next successful platform. Leverage social media to increase student engagement and marketing social services.

Supporting Documentation
- 2018-19 ACE Survey - Surveymonkey
- 2018-19 ACE Learner Satisfaction Engagement and Services Report (See "Tutoring Services Summary" tab)
- Support Services Tracker
- 2018-19 Pearson SmartSkills: Tutoring Report

1.2 Data was collected and reviewed on daily, weekly, monthly, quarterly, and annual basis. In order to provide additional Study Hall options and tutoring locations, ACE partnered with the Library to offer Study Hall hours at the Library and with the Writing Center to facilitate their success. Additionally, data was reviewed for academic groups.

Supporting Documentation
- Types of Reports
  - 2017-18 ACE Learner Satisfaction Engagement and Services Report
  - 2018-19 ACE Learner Engagement and Services Report

1.3 The university has been in the process of its first year of implementation of the strategic plan. Road Maps, developed through its partnership with ACE, initiatives for early identification of academic risk and early communication of possible risk levels were included in the pathway and monitored through this system.

Supporting Documentation
- SEU Academic Support - Early Alert Roadmap (P) (1)
- TR - (Blank) Academic Recovery Plan - SP 2019
- BS - (Blank) Academic Recovery Plan - SP 2019
- Anticipatory Report and Problem Process - Fall 2018
- Email Templates

1.4 The integrative advising model has seen the development of a peer for the campus. Training was provided for all new staff regarding the new system. The model is comprehensive, allowing students to be trained in the system and transferred to the campus. The training will be provided on an ongoing basis.

Supporting Documentation
- Staff Training Log
### Strategic Plan Update

#### 2017-2019 Update

**Southeastern University**

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### Strategic Goals Progress Summary

<table>
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<th>Goal</th>
<th>Progress Summary</th>
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<td>Goal 1</td>
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<tr>
<td>Goal 2</td>
<td>75%</td>
</tr>
<tr>
<td>Goal 3</td>
<td>90%</td>
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<tr>
<td>Goal 4</td>
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### Strategic Initiatives Progress Summary

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<th>Initiative</th>
<th>Progress Summary</th>
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<tbody>
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<td>Initiative 1</td>
<td>90%</td>
</tr>
<tr>
<td>Initiative 2</td>
<td>85%</td>
</tr>
<tr>
<td>Initiative 3</td>
<td>60%</td>
</tr>
</tbody>
</table>

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### Key Points
- **Faculty and Student Engagement:**
  - 12 new faculty positions have been created to support research initiatives.
  - The faculty professional development program has been expanded.

- **Educational Excellence:**
  - 5 new degree programs have been launched.
  - 10 new courses have been added to the curriculum.

- **Research and Innovation:**
  - 3 new research centers have been established.
  - 2 new patents have been filed.

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**Southeastern University**

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### Additional Information
- **Strategic Plan for 2017-2022**
- **Focus Areas:**
  - Academic Excellence
  - Student Success
  - Research and Innovation
  - Community Engagement

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**Southeastern University**

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Tweet-aways

• Strategic Planning should be comprehensive, integrated, and ongoing

• Effective, scalable, sustainable planning requires input from stakeholders across the institution

• Strategic Planning must always be missionally aligned

• Strategic Planning becomes reality when it is integrated into department-level planning
Thank you!

Questions?

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