INDIANA UNIVERSITY SOUTH BEND

STRATEGIC PLANNING PROCESS

October 9, 2020

CAMPUS DIRECTIONS COMMITTEE
Goal

Facilitate process that builds from areas of **strength, promise and opportunity** to create a Strategic Plan that will guide the future of Indiana University South Bend for the next 5 years.
CHARACTERISTICS OF SUCCESSFUL PLANNING AND IMPLEMENTATION

- VISION AND MISSION DRIVEN
- POSITIVE AND OPTIMISTIC
- BUILDS ON PAST
- DEVELOPED BY CAMPUS
- OPEN AND COLLABORATIVE
- FOCUSED AND IMPLEMENTABLE
- CONVERSATIONAL
- CREATIVE
- REALISTIC
- MEASURABLE

CAMPUS DIRECTIONS COMMITTEE
ELEMENTS OF A STRATEGIC PLAN

What are the fundamental beliefs?
Looking into a crystal ball,
What is our ideal future?
Who are we?
What do we do?
Whom do we serve?
**How are we different?**

What do we have to do
to achieve Mission
and move forward?
How will we know when
we have arrived?

**Desired Outcomes**
What are we going to do
to achieve our Desired
Outcomes?

**Why? What? Examples**
STRATEGIC POSITION

STRATEGIC POSITION:
THE LOCATION OF IUSB RELATIVE TO OTHERS IN ITS COMPETITIVE SPACE.

- IT’S CONSISTENT IMAGE OR “BRAND”
  - INTERNALLY
  - EXTERNALLY
    - TO COMMUNITY, REGION, STATE, WORLD
    - PROSPECTIVE STUDENTS, FACULTY, STAFF
    - LARGER HIGHER EDUCATION COMMUNITY

- THE KEY: HOW ARE WE DIFFERENT?

CAMPUS DIRECTIONS COMMITTEE
## STEPS AND TIMELINE

1. **PREPARATION**
   - "GETTING STARTED"
   - Feb./March, 2020

2. **TOWN HALL**
   - "BRINGING EVERYONE ON BOARD"
   - October, 2020

3. **RESEARCH**
   - "DISCOVERING THE DOTS"
   - April - Oct, 2020

4. **CORE VALUES, VISION, MISSION, GOALS, STRATEGIC POSITION**
   - "CONNECTING THE DOTS"
   - October, 2020

5. **GOALS/DESIRED OUTCOMES**
   - "ESTABLISHING THE TARGETS"
   - Nov./Dec., 2020

6. **STRATEGIES**
   - "CHARTING THE COURSE"
   - Jan./Mar., 2021

7. **REVIEW/COMPLETE STRATEGIC PLAN**
   - "BEGINNING THE JOURNEY"
   - April, 2021

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**CAMPUS DIRECTIONS COMMITTEE**
STEP 1: Feb./March, 2020

PREPARATION – “GETTING STARTED”

DEVELOP AND REFINE PROCESS
- MEET WITH KEY INDIVIDUALS AND GROUPS
- CREATE SUBCOMMITTEES (AS NECESSARY)
- DEVELOP GUIDING STATEMENTS
- CONDUCT RESEARCH

REVIEW DOCUMENTS

CREATE COMMUNICATION PLAN
- INTERNALLY
- EXTERNALLY

CAMPUS DIRECTIONS COMMITTEE
STEP 2 (FEB/OCT, 2020)

**Initial Meetings:**

- Town Hall
- Small Group Discussions
STEP 3: Feb/Oct, 2020

Research: “Discovering the Dots”

Facilitator creates a worksheet and helps formulate the key questions and research design.
Step 4 (October, 2020)

CDC Will Refine Core Values, Vision, Mission, and Identify Potential Strategic Goals

- Core Values, Vision, Mission
- Strengths
- Needs/Opportunities
- Major Forces
- Planning Assumptions
- Top Strategic Priorities/Goals
TOWN HALL  (OCTOBER, 2020)
Feedback from University Community
ON
Core Values, Vision; Mission
CAMPUS DIRECTIONS COMMITTEE (OCT/NOV, 2020)

1. CDC refines values, mission, vision, strengths and needs, planning assumptions, strategic priorities/goals

2. CDC creates a cross-departmental Working Group for each Strategic Priority/Goal
STEP 5 (NOV/DEC, 2020)

Formulate Desired Outcomes – “Charting the Course”

- Working Groups identify the Desired Outcomes, for example:
  - Increase head count by 2000 students
  - Increase first-year retention to 75 percent
TOWN HALL (DECEMBER, 2020)

- Feedback on Goals/ Desired Outcomes
- Begin Strategy Development
STEP 6 (JAN/MARCH, 2021)

**Determine the Strategies**

- CDC to assess priorities among current plan initiatives and select those that are most important to achieve desired outcomes.
- The strategies selected will be:
  - Organized around goals.
  - Work across organizational and campus lines.
  - Emphasis on “big ideas”.
  - Strategies are elaborated expressions of an idea.
    - Intro and Background.
    - Basic Elements and Description.
    - Models.
STEP 6 Cont.: March, 2021

Third Town Hall to share Strategies
STEP 7 APRIL 2021
REVIEWS BY APPROPRIATE INDIVIDUALS AND GROUPS (E.G.):

• FACULTY SENATE
Step 7: April, 2021 (Cont.)

Review, Announce, Celebrate— “Beginning the Journey”

- CDC Completes Plan
  - Proofread
  - Name
  - Posts on-line
  - Summary suitable for PR/Fund Raising
  - Power Point Presentation

- Office of Communications and Marketing Develops Communications Plan
CELEBRATION!
AREAS OF GREATEST STRENGTH

• HIGH QUALITY FACULTY AND STAFF WHO ARE CARING AND COMMITTED
• AFFORDABILITY
• PRESTIGE OF IU BRAND
• SMALL CLASS SIZE/PERSONAL ATTENTION
OPPORTUNITIES

• IMPROVE STUDENT RECRUITMENT AND RETENTION
• INCREASE COMMUNITY ENGAGEMENT
• PARTNERSHIPS WITH SCHOOLS AND WORKFORCE DEVELOPMENT
• IMPROVE MARKETING AND BRANDING OF THE UNIVERSITY
• DIVERSIFY STUDENT BODY AND FACULTY
• STRENGTHEN ONLINE EDUCATION
THREATS

• DECLINING ENROLLMENTS/SMALLER NUMBERS OF TRADITIONAL AGED STUDENTS

• LOW RETENTION RATES

• FACULTY/STAFF COMPENSATION/LOW MORALE

• DECLINING STATE SUPPORT/LOWER TUITION REVENUES

• ON-LINE COMPETITION
AREAS OF DISTINCTION

- CENTERS OF EXCELLENCE – CIVIL RIGHTS HERITAGE CENTER/SUSTAINABILITY/COMMUNITY ENGAGEMENT/AMERICAN DEMOCRACY PROJECT/HONORS COLLEGE
- IU QUALITY EDUCATION AT AN AFFORDABLE PRICE
- PERSONAL ATTENTION AND COLLABORATION WITH FACULTY
- REPUTATION OF ACADEMIC PROGRAMS
- ONLY PUBLIC UNIVERSITY IN THE REGION