Cultivating a Culture of Institutional Renewal
Planning as Process: The Role of Standards 2, 3, & 7

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Standard 2
Planning, Resource Allocation, & Institutional Renewal

• An institution conducts ongoing planning and resource allocation based on its mission and goals, develops objectives to achieve them, and utilizes the results of its assessment activities for institutional renewal.

• Implementation and subsequent evaluation of the success of the strategic plan and resource allocation support the development and change necessary to improve and to maintain institutional quality.
Plan

Set measurable goals

Objectives to achieve the goals

Allocate resources

Assess progress

Mission

Standard 2 In Action
Standard 3
Institutional Resources

• The human, financial, technical, facilities, and other resources necessary to achieve an institution’s mission and goals are available and accessible.

• In the context of the institution’s mission, the effective and efficient uses of the institution’s resources are analyzed as part of ongoing outcomes assessment.
Standard 3 In Action

1. Plan
2. Set measurable goals
3. Allocate sufficient resources
   - Objectives to achieve the goals
   - Assess progress
The institution has developed and implemented an assessment plan and process that evaluates its overall effectiveness in:

- Achieving its mission and goals;  (1)
- Implementing planning, resource allocation and institutional renewal processes; (2)
- Using institutional resources efficiently; (3)
The institution has developed and implemented an assessment plan and process that evaluates its overall effectiveness in:

• Providing leadership and governance; (4)

• Providing administrative structures and services; (5)

• Demonstrating institutional integrity; (6)

• And assuring that institutional processes and resources support appropriate learning and other outcomes for its students and graduates. (8-14)
Standards 2 and 3

Given our commitment to our institution’s mission, are we

✓ planning wisely
✓ thoughtfully allocating sufficient resources to achieve our goals?
Standard 7: How will we show?

- Supported
- Understood
- Participatory
- Disciplined
- Systematic
- Reviewed
- Renewed
- Sustained
Supported

• Is the president “front and center” in supporting the planning efforts?

• Is everyone delivering the same message?

• Who is the person/unit responsible for the day-to-day care and feeding?

• Are the objectives and strategies undertaken to accomplish the goals sufficiently resourced?
Understood

• Are we talking the same language?
• Do individuals know there is a strategic plan?
• Would they be able to find it if asked?
• Could they talk about it?
• Do they know that it is intended to apply to them?
• Can they articulate what they are doing in support of the strategic goals, objectives, and strategies?
Participatory

Gathering a range of ideas

Distilling guiding principles
Disciplined

• Has the planning process focused the institution?
• Has it clarified what we won’t do as much as to what we will do?
• Are we doing what we said we are going to do?
• Do the planning/implementation steps occur on time and in the order originally intended?
Disciplined: Our Planning Process

Plan
Set measurable goals
Objectives to achieve the goals
Allocate sufficient resources
Assess progress
Not so much: Our Planning Process

- Assessment
- Plan
- Goals
- Wants
- Pressures
- Terrific Ideas
- Resource Allocation
- Strategies
Disciplined

- Do all “planning roads” emanate from and lead back to mission?
Systematic

• Where are we on the continuum between:

• Tweaking

How the heck do we do this?

• Has the process been “institutionalized” as in “this is how we do business”?

• Or are we continually retrofitting, backfilling, and playing catch up?
Reviewed & Renewed

• Are there pre-determined places in the process where we pause to ask the questions:
  – How are we doing?
  – Did “it” have the intended impact?

SO WHAT!??
Reviewed & Renewed

• Were sufficient resources allocated?
• Were sufficient resources available in the first place?
• Ohhhh, we needed smart classrooms for that to work ...
  – Capital vs. operating
  – Impact on infrastructure
  – Training staff/faculty in new approach
  – Strain on technology infrastructure and budget
Reviewed & Renewed

• Are there benchmarks?
• **Can** they be tracked?
• Are they being tracked?
• Can you point to positive change?
• Are results communicated widely?
• Are we still doing the same things we did five or ten years ago . . .
  – Because they work ...  
  – Because “we’ve always done it this way”
• **In light of our mission**
  – Do the goals, objectives, strategies, and intended outcomes *make sense*?

• **When resourcing initiatives**
  – Do we currently have the personnel, skills, knowledge, *stamina*, and *will* to “make it happen”? 
  – If not are we prepared to acquire them?

• **When forecasting future resources**
  – Can “this” be maintained once achieved?
Sustainable

So what will start, continue, grow, sunset?

How many students and how well

People, time, and $$$

COST

IMPACT

More to Most
A **Culture** of Institutional Renewal

- Strong and committed leadership
- A shared understanding
- A champion
- An opportunity to participate from conception to completion
  - Buy-in
- Communication
  - Early and often and multi-channeled
- Transparency
Observations

• If we are looking to “find the time” to do “this” then the process is not yet a part of who we are

• The “loop process” does not come naturally
  – We do need to provide professional development opportunities and continued support

• It’s easier to develop a plan than it is to devise a budget that supports the actualization of that plan
Observations

• Developing “so what” outcomes takes practice
• Often more “practice” is needed in the institutional support areas
• It is not easy to let go of something(s) that we have been doing for years
• It is especially difficult to consider “abandoning” the few to benefit the many
Plan

Set measurable goals

Allocate sufficient resources

Objectives to achieve the goals

Assess progress

Mission

Standards 2 & 3
Standard 7

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Good luck and thank you