

TRACKING OUR PROGRESS: CREATING A STRATEGIC PLANNING & BUDGETING SYSTEM

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SALISBURY UNIVERSITY

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SUNY BUFFALO STATE COLLEGE

LEARNING OBJECTIVES

Attendees will be able to:

- Identify unit-level initiatives and link them to their institutional Strategic Plans.
- Describe key performance indicators that would demonstrate the success of unit-level initiatives.
- Recognize the key components to building a robust approach to evaluating institutional effectiveness.

SALISBURY UNIVERSITY



Founded: 1925

Location: 30 miles west of Ocean City, MD; 115 miles southeast of Baltimore, MD

Students

- 42 Undergraduate, 15 Graduate, and 2 Doctoral programs
- 8,748 students (7,861 undergraduate; 887 graduate)
- 88.5% of students are full-time

Faculty/Staff

- 1,789 faculty and staff
 - 415 full-time faculty, 328 tenured/tenure track
 - 241 part-time faculty
 - 1,133 staff, 606 full-time and 527 part-time

Salisbury
UNIVERSITY

SUNY BUFFALO STATE COLLEGE



Founded: 1871

Location: Buffalo, NY

- Urban campus, approaching 50% minority student population

Students

- 170 undergraduate programs, 63 graduate
- 10,330 students (9,116 undergraduate, 1,140 graduate)

Faculty/Staff

- 422 Full time faculty, 418 part time
- 1,018 staff, 600 part time



2016 SELF-STUDY

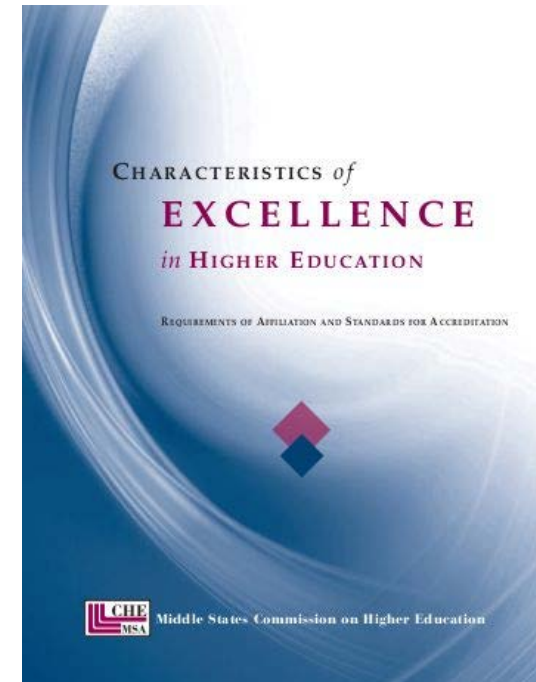
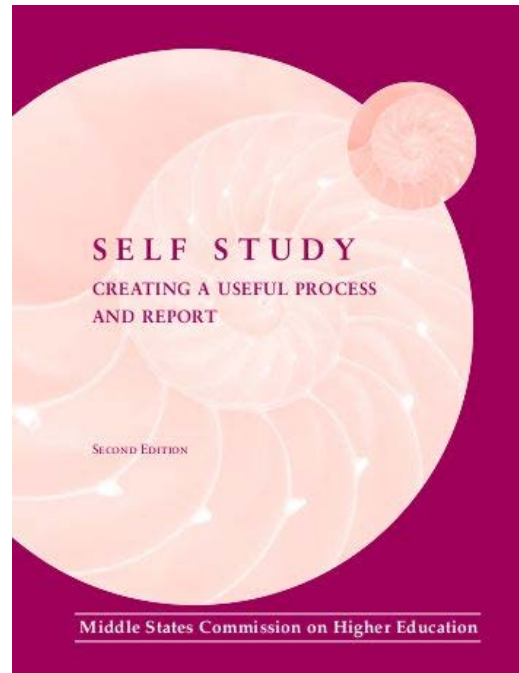
- 2011 Periodic Review Report

Standard 14 Recommendations

- *Further implementation of an organized and sustained process for the assessment of student learning outcomes*
- *Use of assessment results in all programs, including general education, to improve teaching and learning*

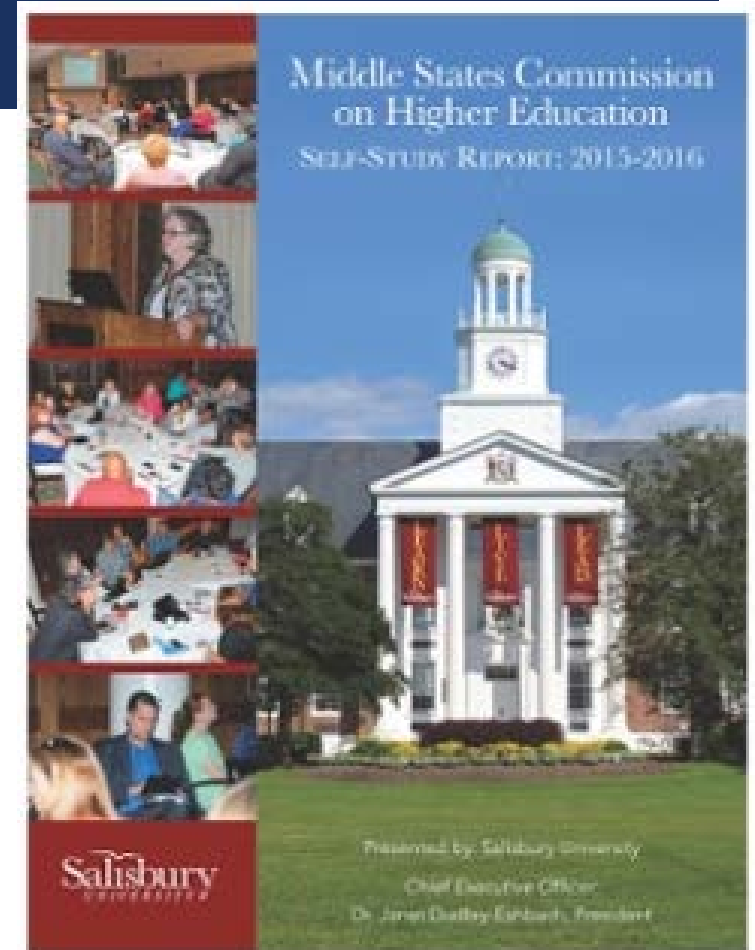
- 2013 Progress Report

- 2016 Self-Study process began



SELF-STUDY TIMELINE

- December 2013-Co-chairs selected
- January 2014-1st Steering Committee Meeting
- April 2014-Self-Study Design draft submitted; MSCHE liaison visit
- May-Campus meeting to discuss the Self-Study Design and process
- Early fall 2014-Working groups created
- April 2015-Campus update on Self-Study process
- May 2015-Working group reports due
- July 2015-Self-Study draft submitted to the Steering Committee and Executive Staff
- Fall 2015-Campus review and input on the Self-Study report
- January 2016-Self-Study final report submitted to visiting team



2016 SELF-STUDY ORGANIZATION

- I. Academic Excellence: Standards 10, 11, 12
- II. Foster Community: Standards 8, 9
- III. Academic Innovation: Standard 13
- IV. Provide Resources: Standards 1, 2, 3
- V. Provide Leadership: Standards 4, 5, 6
- VI. Assessment: Standard 7, 14



IDENTIFYING INSTITUTIONAL RECOMMENDATIONS

- Summarized at the end of each chapter and comprehensively listed in the final chapter.
- Begin to address internal recommendations prior to the completion of the Self-Study
 - creation of an assessment instrument to evaluate administrative leaders;
 - development of the Strategic Planning and Budgeting System;
 - expansion of the General Education assessment process to include data collection outside of General Education courses; and
 - creation of a General Education Review Committee.

STRATEGIC PLANNING & BUDGETING

- **STANDARD 2: PLANNING, RESOURCE ALLOCATION, AND 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.*

- **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.*

STRATEGIC PLANNING & BUDGETING

- Strategic Planning and Budgeting Committee (2008)
- Tracking progress toward our Strategic Plan Goals (2009-13 Strategic Plan)
 - [2010 Progress Report](#)
 - [Final Progress Report](#)



SU Strategic Plan Goal:	
Recommendation:	
Strategy	
Desired Outcome(s) or Key Performance Indicator(s):	
Base Year Budget	
Estimated 5-Year Budget	
Lead Responsibility	

**Note. One spreadsheet should be completed for each strategy used to achieve the identified Strategic Plan recommendation.*

Estimated Implementation Timeline		
Semester/Year	Action Step	Responsible Office

USM's Strategic Plan (if applicable)	

Other University Strategic Plan (if applicable)	

Annual Strategic Plan Goal/Recommendation Update			
Year	Actual Results	Responsible Office	Budget
2014-15			
2015-16			
2016-17			

				USM's Strategic Plan (if applicable)		
SU Strategic Plan Goal:	Goal 2-Continue to attract and retain			Theme 1	College Completion--A 55% degree attainment level for Maryland	
Recommendation:	2.1-Continue to retain and address the needs of students by creating systems that will close the achievement gap and build engagement of students in					
Strategic Plan Action Item (Action step relevant for your office)	Purchase an enrollment management/retention product to identify at-risk students and provide assistance with choosing a major, choosing courses, and completing graduation					
Desired Outcome(s) or Key Performance Indicator(s) (How will you know if the action item was successful?)	Attain a 85% second-year retention rate Improve satisfaction with advising services			Other University Strategic Plan (if applicable)		
				SU Enrollment Master Plan	Goal V	State, Federal, and System Mandates – Continue to enhance recruitment and retention initiatives that will help the University meet state and federal goals.
				SU Enrollment Master Plan	Goal IV	Resources – Create sustainable resource models that support achievement of enrollment goals.
				SU Enrollment Master Plan	Goal III	Alignment – The University will improve systems and protocols to ensure that enrollment initiatives and
Estimated 5-Year Budget						
Lead Responsibility	Vice President of Student Affairs, Provost					
<i>*Note. One spreadsheet should be completed for each strategy used to achieve the identified Strategic Plan recommendation</i>						

Annual Strategic Plan Goal/Recommendation Update					
Year	Estimated Milestone(s)	Actual Results	Responsible Office	Estimated Budget	Actual Budget
2014-15	Meet with EAB and determine data and implementation needs		Vice President of Student Affairs, Provost		
2015-16	Select departments to participate in a pilot of the software and implement pilot.		Vice President of Student Affairs, Provost		
2016-17	Campus-wide training effort for faculty and staff and full implementation		Vice President of Student Affairs, Provost		
2017-18					
2018-19					

KEY COMPONENTS TO EVALUATING INSTITUTIONAL EFFECTIVENESS

Learning objective: Recognize the key components to building a robust approach to evaluating institutional effectiveness.

- Identify initiatives and link them to the University's Strategic Plan(s)
- Determine who will be responsible
- Identify costs and update as appropriate
- Track progress
- Align budgets with these initiatives



STRATEGIC PLANNING AND BUDGETING SYSTEM (SPBS)

- Collaborative effort (2014)
 - Academic Affairs
 - University Analysis, Reporting & Assessment
 - Web Development
- Standardized format with ability to export reports
- Strategic Planning and Budgeting System

The screenshot shows a web browser window displaying the Strategic Planning & Budgeting System (SPBS) interface. The browser address bar shows the URL <https://webapps.salisbury.edu/spbs/>. The page features a dark red header with the title "Strategic Planning & Budgeting System" and the Salisbury University logo. Navigation buttons for "Back", "Home", and "Log Out" are visible on the left, while "Admin", "kosiegert", and "Ask Question/F" are on the right. Below the header, there are two green buttons: "Create New Action Item" and "Display by Office". The main content area is titled "Strategic Plan Action Items" and lists "Goal I: EDUCATE". A table below this title displays a list of action items with columns for "Summary", "Lead Name", and "Lead Email".

	Summary	Lead Name	Lead Email
View/Edit	In collaboration with the Office of Admissions develop a recruitment plan that maintains current levels (2014-2015 incoming class) of high caliber Honors students	James Buss	jjbuss@salisbury.edu
View/Edit	In collaboration with the University Advancement and External Affairs, specifically the major gifts officer, solicit gifts to increase the current endowment for the Honors program held with the Salisbury University Foundation, Inc. to provide substantial programmatic and academic financial support.	Jason Curtin	jecurtin@salisbury.edu
View/Edit	In collaboration with University Advancement and External Affairs increase the current endowment for the Honors program held with the Salisbury University Foundation, Inc. to provide substantial programmatic and academic financial support.	James Buss	jjbuss@salisbury.edu
View/Edit	Increase marketing resources as funds are available.	Aaron Basko	ambasko@salisbury.edu

STRATEGIC PLANNING AND BUDGETING SYSTEM (SPBS)

- Build it and they will come??
- Training in summer 2014
- Examples provided from each administrative area
- Key campus offices were asked to include at least 2-3 strategic initiatives and estimate milestones and budgets



LINKING INITIATIVES TO STRATEGIC PLANS

Learning Outcome: Identify unit-level initiatives and link them to their institutional Strategic Plans.

Academic

In collaboration with the Academic Deans, Provost's Office, and UAAC assess the General Education Student Learning Goals and Outcomes.

Financial

Continue to provide numerical evidence documenting the lack of fairness in appropriation of state general funds from USM.

In collaboration with University Advancement and External Affairs increase the current endowment for the Honors program held with the Salisbury University Foundation, Inc. to provide substantial programmatic and academic financial support.

Strategic Planning & Budgeting System



[Home](#)

[Log Out](#)

[Admin](#) [Kasie](#)

Goals/ Recommendations

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Initiative Action Item

Initiative Item: Strategy

Collaboration with the Office of Admissions develop a recruitment plan that maintains current levels (2014-2015 incoming class) of high caliber Honors students

Initiative Outcomes/ Key Performance Indicators (KPI's)

File Edit Insert View Format Table Tools

Formals B I [Table Icons]

- Recruit equivalent of 10% of incoming freshman class into Honors Program
- Ensure that honors student profile (gpa, SAT, ACT) matches or exceeds previous year averages

Initiative Name

James Buss

Initiative Unit

Office of Academic Affairs

Initiative Responsibility Name

Search for at least 3 letters to search...

Initiative Administrative Unit

Office of The President

Lead Email

jbuss@salisbury.edu

Department

Honors Program

Secondary Initiative Responsibility Email

Secondary Department

--Select Department--

Status

Ready for Review

(Only check if Timeline & Budget section is complete up to and including the current academic year AND at least one Strategic Plan Recommendation has been selected)

Active Entry

Active? Uncheck to hide this Action Item

Timeline & Budget

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Notes

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Attachments

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MEASURING SUCCESS

Learning Outcome: Describe key performance indicators that would demonstrate the success of unit-level initiatives.

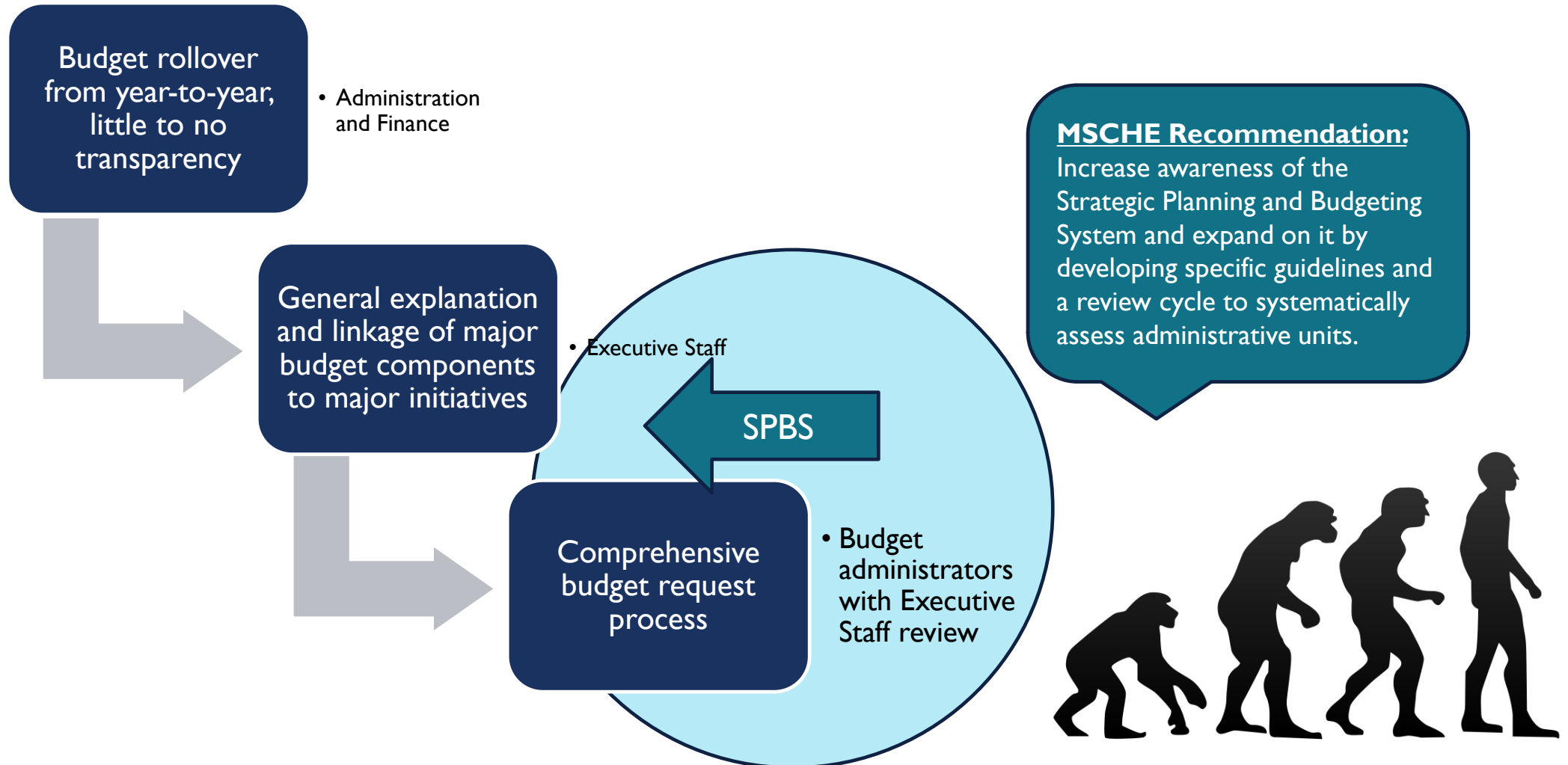
Academic

- Improve the effectiveness and efficiency of the academic advising process
 - Increased student satisfaction with academic advising (Student Satisfaction Inventory)
 - Improved second-year retention rates-2013 retention rate 82%
 - Higher retention rates and satisfaction for students from programs utilizing the new professional academic advisors

Enrollment

- Increase graduate enrollment to 10% of all student enrollment by AY 2018-19
 - Graduate enrollment above the fall 2013 level: 639 (7.4% of enrollment)
 - Increase graduate enrollment representation by .5 percent each year between fall 2013-fall 2018
 - Fall 2014: $773/8770 = 8.8\%$
 - Fall 2015: $822/8671 = 9.5\%$
 - Fall 2016: $887/8748 = 10.1\%$

BUDGETING-AN EVOLUTIONARY PROCESS



SELF-STUDY ACTION

To reaffirm accreditation and to commend the institution on the quality of the self-study process and report. The date for the next accreditation review will be determined by the Commission when it revises the accreditation cycle.



MIDDLE STATES COMMISSION
ON HIGHER EDUCATION

TRANSFERRING THE PROCESS TO ANOTHER SCHOOL



QUESTIONS?



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