WALF STRATEGIC PLANNING TOOLKIT

April 2010
Presenters

• Sona Andrews – Boise State University
• Sam Gingerich – South Dakota Board of Regents
• Christine Mallon – California State University
• Jane Sherman – Washington State University
• Session purpose
• Toolkit description
• Toolkit demo
• Template and experience working with toolkit
• Discussion
• Evaluation
THE TOOLKIT INCLUDES:

• Best practices focused on specific projects of interest to academic leaders
• Decision making tools including:
  – The context, setting and characteristics of institution(s) that have developed and used them
  – Purpose
  – Description
  – Results
  – Lessons learned
  – Contact information of those who have developed and used them
• Search by categories or key words
• Rating of the tool
CRITERIA FOR INCLUDING A TOOL IN THE TOOLKIT:

• Must be an issue that is relevant to the WALF membership
• Must be a tool in the process of being used or has been implemented (not just an idea)
• Submitting institution must be willing to share lessons learned (both good and bad)
• Must have enough detail and materials to provide a comprehensive view and solutions to the issue
• Must have the potential to be adapted by other institutions
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Today’s academic leaders are faced with countless challenging decisions. We must continually find new ways to ensure institutional effectiveness, reallocate limited resources, and improve student learning. We must make decisions in thoughtful ways that protect the integrity of our institutions’ missions and their promises to current and future students and faculty. We must ensure that we use our limited resources most cost effectively to provide programs and courses that prepare students to meet the needs of our WICHE states and the country.

To assist academic leaders with these challenges, the WALF Strategic Planning Toolkit, launched in April 2010, provides a depository and resource of useful decision making tools. This toolkit highlights numerous best practice cases on a variety of academic issues to assist in decision making and advancing our institutions. We recognize that there already exist a number of useful tools and resources for sharing of information and developing strategies for problem solving. This toolkit is not designed to replace those, but rather to complement them, to serve as a value added resource for the exchange of ideas, and to focus on issues relevant to institutions in the WICHE states.

THE TOOLKIT INCLUDES:

- Detailed best practices focused on specific topics
- Decision making tools including
  - The context, setting and characteristics of institution(s) that have developed and used them
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Western Academic Leadership Forum (WALF)

TOOLs

WALF STRATEGIC PLANNING TOOLKIt

Tools

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If you use one of the tools, be sure to rate your experience and provide a review so that future users can benefit from your experience too. Search for the tool and choose Review Form at the bottom of the profile.

Disclaimer: The materials in this toolkit are provided by WALF members for use by other members. They can be adopted or adapted as needed. Inclusion in the toolkit does not imply endorsement by WICHE or other WALF members.

Through the Western Academic Leadership Forum (WALF), academic leaders at bachelor's, master's, and doctoral institutions and chief executives and chief academic officers for systems and state governing boards exchange ideas and information, share resources and expertise, and collaborate on regional initiatives. Through this collaborative network, these academic leaders build a stronger future for higher education in the West.
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WALF STRATEGIC PLANNING TOOLKIT

TOOL LIST

Below is a list of tool categories with the number after each indicating how many tools are in the repository in that category.

- **Academic Technology**
  - Distance Education (0)
  - Technology (0)

- **Curriculum**
  - Academic Programs (0)
  - Assessment (1)
  - Core Curriculum (0)
  - Distance Education (0)
  - Diversity (0)
  - General Education Requirements (3)
  - Graduate Programs (0)
  - Honors College (0)
  - Internationalization (0)
  - Program Review (1)
  - STEM (0)

- **External Constituencies**
  - Accountability (0)
  -
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- External Constituencies
  - Accountability (0)
  - NCAA (0)
  - NRC (0)

- Walf Resources
  - About Walf
  - Initiatives
  - Membership
    - Application
    - Current Members
    - Executive Committee
  - Meetings and Presentations
  - Contact Us
  - Member Site
  - Walf Home

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**A2P2 (Academic Affairs Program Prioritization)**

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<tr>
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**Rating**: ★★★★★
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# A2P2 (Academic Affairs Program Prioritization)

**Keywords:** Prioritization, Assessment, Program Review

**Rating:** ★★★★★

**Institution/Organization:** Washington State University

**Setting:** A land-grant, very high research university, serving over 25,000 students in Pullman, and at campuses in Spokane, the Tri-Cities, and Vancouver, plus distance degree programs.

**Purpose:**

**Issue:** How to thoroughly and fairly analyze and categorize programs to support excellence, and to de-emphasize and/or eliminate unsuccessful or unnecessary programs and courses.

**Goals:**

1. Utilize a valid and inclusive process so that results will have broad support across the institution.
2. Identify programs for budget growth and/or reduction.
Consolidations, reductions, eliminations.

Going forward, the Frameworks (rubrics) will be utilized for regular Academic Program Reviews, which were suspended for the two-year duration of this project.

FOR MORE INFORMATION

<table>
<thead>
<tr>
<th>Links to Institutional Documentation</th>
<th>Overview of Proposed Prioritization Process</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Phase I Task Force Roster</td>
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<tr>
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<td>Process Overview Timeline - .pdf</td>
</tr>
<tr>
<td></td>
<td>Academic Affairs Program Prioritization Criteria</td>
</tr>
<tr>
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<td>Guidelines to Areas for Self-Reviews</td>
</tr>
</tbody>
</table>

1. Program Prioritization Framework:
   - Research |
   - Scholarship |
   - Teaching and Learning |
   - Scholarship and Research |
   - Outreach and Engagement |

2. Framework for Centers, Institutes, and Laboratories (CILs)


4. Program Data: (provided by Institutional Research for each program)

<table>
<thead>
<tr>
<th>Links to Other Relevant Information</th>
<th>The project design team was led by Mary Doyle, PhD, formerly at WSU and currently Vice Chancellor for IT at UC Santa Cruz.</th>
</tr>
</thead>
<tbody>
<tr>
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<td>The frameworks and process were based on Prioritizing Academic Programs and Services: Reallocating Resources to Achieve Strategic Balance, Robert C. Dickeson, 1999.</td>
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<table>
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<tr>
<th>Contact for More Information</th>
<th>Larry James</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Executive Vice Provost</td>
</tr>
<tr>
<td></td>
<td>WSU</td>
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<td></td>
<td>French Ad 436</td>
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<tr>
<td></td>
<td>Pullman, WA 99164-1046</td>
</tr>
<tr>
<td></td>
<td>509.335.5581</td>
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<tr>
<td></td>
<td><a href="mailto:jameslg@wsu.edu">jameslg@wsu.edu</a></td>
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| Date Submitted | February 2010 |
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SEARCH FORM

SEARCH BY:
Title
Keyword
Category Core Curriculum

LIMIT BY:
Size of institution 20,000-10,000
System/state tool Systems

Submit
**Tool Profile**

<table>
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**Setting**

A large public institution in Idaho with 19,500 students, 150 undergraduate programs, 72 masters programs and 4 doctoral programs. Governed by a state board of education. Accredited by NWCCU.

**Purpose**

Reviewing and revising general education requirements for the baccalaureate degree.

**Issue**

Reviewing and revising general education requirements for the baccalaureate degree.

**Goals**

Develop recommendations to the Faculty Senate as to how Boise State University's core requirements might best facilitate student preparation for graduate study.
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**Purpose**

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NEW TOOL SUBMISSIONS

New submissions are always welcome! This is a great way to share your experience with other colleagues and to contribute to the knowledge pool on academic leadership.

To submit a tool or process for inclusion in the repository, complete the Tool Submission Form. Our Toolkit Oversight Committee reviews all submissions according to the criteria below as well as for clarity and completeness of the information provided. Once accepted the new tool will be available to other members for their use. Each tool may be rated and/or reviewed by the users to provide additional information to other members.

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---

**Tool Name**
State in a maximum of 5 words the name of the tool

**Keywords**
List a maximum of 5 key words for the searchable database

**Tool Category**
Choose from drop down list. If other, list new category.
Other Category

Institution/Organization Name*

Web Address

Appropriate User for Tool
Choose from drop down list

Size*
Select size of the organization or institution

Greater than 15,000

Setting*
Describe the type, location, and other relevant institutional/organizational characteristics in 25 words or less

PURPOSE

Issue*
Describe in a maximum of 20 words the issue being addressed by the tool

Goals / Expectations*
List in order of priority
DESCRIPTION

**Summary Description**
Describe in a maximum of 75 words what the tool is designed to accomplish.

**Major Characteristics**
List and describe what is available in the toolbox for this tool. Make note if there are reports, spreadsheets, web based applications, plans, lists of questions, etc.

**Special Features**
List and describe any special features of the tool.

RESULTS

**Performance Measures**
List a maximum of 5 performance measures used to assess effectiveness.
Outcomes*
Describe in a maximum of 75 words the outcome of using the tool

Impact*
Describe in a maximum of 75 words the impact of the tool

RESOURCES & LESSONS LEARNED

Resources Needed*
Describe in a maximum of 25 words. List the resources, needed for the project including personnel (new and existing), training, software, space, consultants, etc. If relevant, attach a business plan

Costs*
List the costs for planning and implementation

Lessons Learned*
List a maximum of 10 lessons learned and elaborate as needed
<table>
<thead>
<tr>
<th>Date Submitted</th>
<th>February 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted by</td>
<td>Jane Sherman</td>
</tr>
<tr>
<td></td>
<td>Vice Provost for Academic Policy and Evaluation</td>
</tr>
<tr>
<td></td>
<td>WSU</td>
</tr>
<tr>
<td></td>
<td>410 11th AVE SE</td>
</tr>
<tr>
<td></td>
<td>Olympia, WA 98501</td>
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<tr>
<td></td>
<td>360.534.2322</td>
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<tr>
<td></td>
<td>Fax: 360.586.0665</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:shermanj@energy.wsu.edu">shermanj@energy.wsu.edu</a></td>
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Rate this tool.

Simply click on a star to rate the usefulness of this tool with 5-star being the most useful.

- ★ 5-star
- ★ 4-star
- ★ 3-star
- ★ 2-star
- ★ 1-star

Tell us how this tool worked for you.

If you used this tool or a variation on it, contribute to the knowledge pool by completing a review to let your colleagues know how it worked for you.
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| REVIEW 2 |
Oversight Committee

- Jere Mock
- Kay Hulstrom
- Pat Shea
- Christine Mallon
- Reed Dasenbrock
- Sona Andrews
- John Miller
- Sam Gingerich
- Jane Sherman
Discussion and Evaluation