Four Phases of IE Planning

Phase IV-
Evaluation
and
Assessment

Phase III-
Implementation

Phase II -
Planning

Phase I –
Pre-
planning
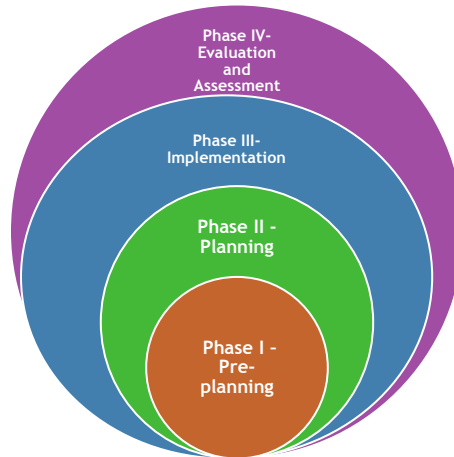
Four Phases:
Developing IE Strategic Plans – Year 1

Phase I: Pre-Planning	Phase II: Planning
Laying the Foundation	**Develop Strategic Plan**

• Create Core IE Campus Leadership Teams for each major functional area • Identify data, inquiry process and analytic tools • Conduct pre-assessment of institutional readiness around core guiding principles • SWOT or MAPPING • Establish a culture of evidence • Create institutional awareness, cultivate buy-in	• Define overall scope of the plan for the 1st 3 years • Determine areas of primary emphasis to achieve equitable outcomes • Define IE goals and objectives • Define evaluation and assessment measures for accountability • Develop capacity building professional development programs • Develop reporting procedures to track progress • Define clear lines of authority

Four Phases:
Developing IE Strategic Plans, Year 2 & 3

Phase III: Implementation	Phase IV: Evaluation & Assessment
Formal Implementation of Strategic IE Plans	**Recurring Continuous Evaluation & Assessment**

Common elements for each plan:
- Statement of the challenge
- Rationale for diversity, equity and inclusion
- Indicators of Success
- Recommendations for recruitment, retention, diversity education, research & scholarship
- Campus Climate
- Marketing & Communications
- Rewards

- Establish Rubrics
- Evaluate, measure and monitoring progress towards goals and objectives at each functional level
- Realign procedures if lack of progress
- Implement new strategies
- Identify success and areas where more work is needed

Questions to Ponder :
Institutional and Administrative Leadership

- Who's at the table? Who's missing?

- Who must participate in strategic, operational and academic planning ?

- Does your institutional mission clearly emphasize equity and excellence for ALL students?

- Do senior leaders frequently discuss high expectations for students?

- How can the connections – theoretically and operationally- be established to strengthen the links between academic and student affairs to support equity and excellence for all students?

- To what extent do institutional norms, reward systems and other aspects of institution's culture value student success?

- What indicators are used to measure institutional performance and accountability in key areas and to determine that data inform policy and decision-making?

- How do you ensure that you hire people committed to enacting these principles?

- Who leads public conversations to strengthen academic values and engage the campus community in work that supports equity and inclusion?