

# **Integrated Planning Overview**

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# Today's Agenda

- Overview of Integrated Planning
- Overview of Planning & Resource Alignment
- Overview of Annual Unit Planning
- Planning Support Available
- Open Discussion

# Planning – In Real Life

When is the last time you planned for something?

Wedding

Medicine, Food, and  
Supplies for Family during  
Pandemic

Financial Future

Jiu Jitsu Tournament

Child's Birthday  
Celebration



# Why plan?

*Just to name a few reasons...*

- Allocate Resources
- Assess and Reflect on Progress
- Assess Risks and Opportunities
- Create Unity
- Develop Solutions to Identified Challenges
- Identify Improvement Opportunities
- Identify Strengths
- Improve Performance
- Inform Stakeholders of Priorities and Efforts
- Manage Time Efficiently
- Match Actions with Identified Needs
- Prepare for the Future
- Set Direction and Priorities
- Set the Stage for Collaboration
- Support the Mission and Vision

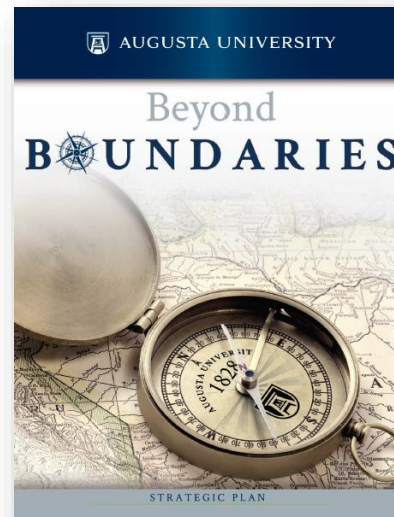
# Planning Integration

## • Annual Unit Plans

- Goals
- Tactics
- Measures

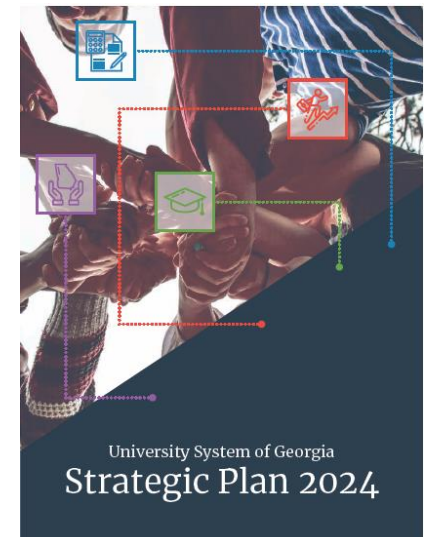
## • *Beyond Boundaries* Strategic Plan

- Education
- Research & Scholarship
- Clinical Care
- Outreach & Economic Development
- Institutional Culture & Engagement
- Financial Sustainability



## • USG Strategic Plan 2020-2024

- Student Success
- Responsible Stewardship
- Economic Competitiveness
- Community Impact



# USG Strategic Plan 2024 - Goals

## STUDENT SUCCESS



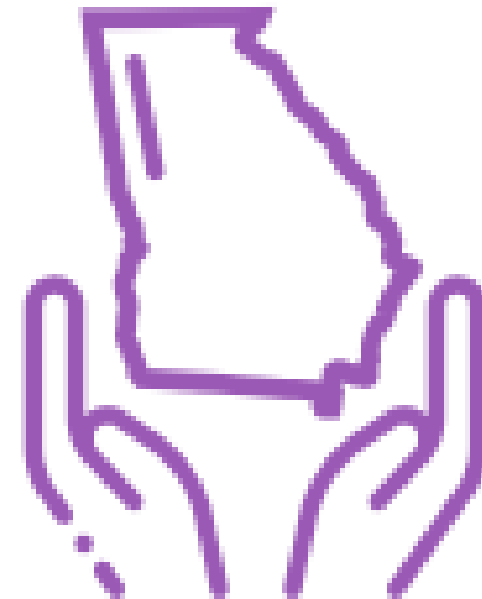
## ECONOMIC COMPETITIVENESS



## RESPONSIBLE STEWARDSHIP



## COMMUNITY IMPACT



[https://www.usg.edu/strategic\\_plan/](https://www.usg.edu/strategic_plan/)

# USG Strategic Plan 2024 – Deeper Look



## STUDENT SUCCESS

### Metrics



Number of degrees & certificates awarded



Number of adult-aged undergraduate students

### Strategic Initiatives

- Momentum Approach
- Expand Distance Education Opportunities



## RESPONSIBLE STEWARDSHIP

### Metrics



Average time to degree for bachelor's and associate degrees



Annual savings to students through free textbooks



Percentage of students maximizing total federal student loan borrowing

### Strategic Initiatives

- Know More Borrow Less
- Affordable Learning Georgia

# USG Strategic Plan 2024 – Deeper Look



## ECONOMIC COMPETITIVENESS

### Metrics



Research expenditures



- Measure student achievement of marketable skills
- Create a metric on faculty scholarly productivity

### Strategic Initiatives

- Redesign General Education Curriculum
- Expand Nexus Degrees



## COMMUNITY IMPACT

### Metrics



Number of graduates in health professions



Number of student enrollments in experiential learning courses

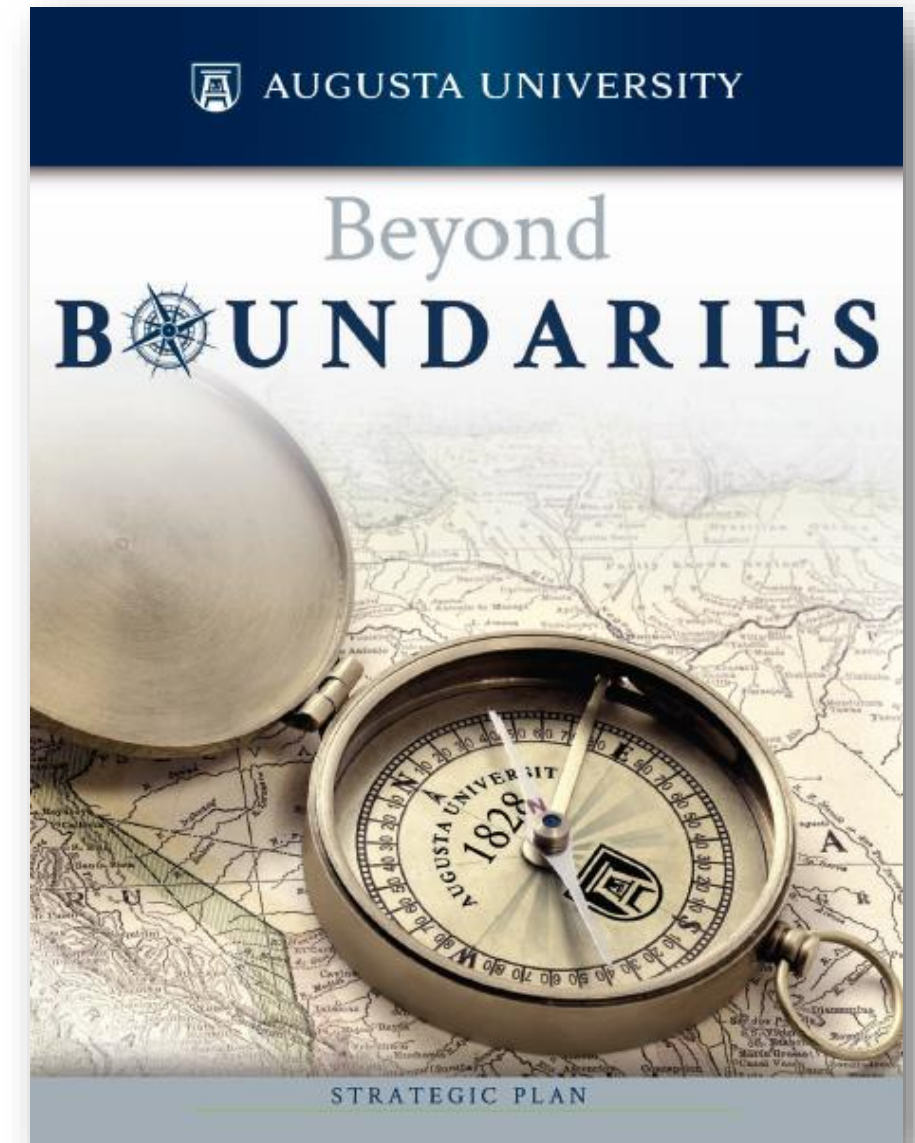
### Strategic Initiatives

- Increase the Number of Graduates in Health Professions
- Expand Experiential Learning Opportunities



# AU Strategic Plan

## KEY PERFORMANCE INDICATORS



# AU Strategic Plan: Organizational Goals

## EDUCATION

- Student Recruitment & Support
- Educational Innovation
- Academic Quality & Reputation
- Faculty Educator Recruitment & Support as Educators

## RESEARCH & SCHOLARSHIP

- Discovery & Innovation
- Researcher Development
- Research Infrastructure & Support
- Faculty Recruitment & Support as Researchers

## CLINICAL CARE

- Innovative Health Care
- Performance Excellence
- Health Care Workforce
- Clinical Environment

## OUTREACH & ECONOMIC DEVELOPMENT

- Economic Impact
- Community Engagement
- Professional Engagement
- Cyber Collaborations

## INSTITUTIONAL CULTURE & ENGAGEMENT

## FINANCIAL SUSTAINABILITY

# AU Strategic Plan: KPIs

## EDUCATION

- Total Fall Enrollment
- 1 Year Retention Rate
- 6 Year Graduation Rate
- Degrees Awarded

## RESEARCH & SCHOLARSHIP

- Sponsored Awards
- Faculty Scholarly & Creative Products
- NIH Medical School Rankings

## CLINICAL CARE

- Patient Experience/Satisfaction
- Transitions of Care
- Health Care Access
- Health Professions Degrees Awarded

## OUTREACH & ECONOMIC DEVELOPMENT

- Economic Impact
- Professional Engagement
- Cyber-Related Collaborations

## INSTITUTIONAL CULTURE & ENGAGEMENT

- Undergraduate Student Engagement
- Employee Engagement
- Diversity & Inclusion Climate

## FINANCIAL SUSTAINABILITY

- Philanthropy
- Instructional Proportion of Total Expenditures
- Administrative Proportion of Total Expenditures

# High-Level Crosswalk of Alignment to USG

USG Strategic Plan 2020-2024 Goals						
			Student Success	Responsible Stewardship	Economic Competitiveness	Community Impact
Beyond Boundaries Organizational Strategic Priorities and Goals	Education	Student Recruitment & Support	X	X	X	
		Educational Innovation	X		X	
		Academic Quality & Reputation	X		X	X
		Faculty Educator Recruitment & Support as Educators			X	
	Research & Scholarship	Discovery & Innovation				X
		Research Development	X		X	X
		Research Infrastructure & Support	X	X	X	X
		Faculty Recruitment & Support as Researchers				X
	Clinical Care	Innovative Health Care				X
		Performance Excellence				X
		Health Care Workforce	X		X	X
		Clinical Environment				X
	Outreach & Economic Development	Economic Impact				X
		Community Engagement				X
Professional Engagement				X	X	
Cyber Collaborations					X	
	Institutional Culture & Engagement	X			X	
	Financial Sustainability	X				



# Who creates annual unit plans?

About 32 Major Administrative Planning Divisions

## REQUIRED PLANNING UNITS

Members of President's Cabinet

## EVP DISCRETIONARY PLANNING UNITS

Units with responsibilities for multi-year efforts (at least one factor):

- Aligned with *Beyond Boundaries*
- Critical to upholding the AU mission
- Contributing to Shared Governance
- Otherwise determined by Executive Cabinet

# Planning – Collaboratively

## Internally

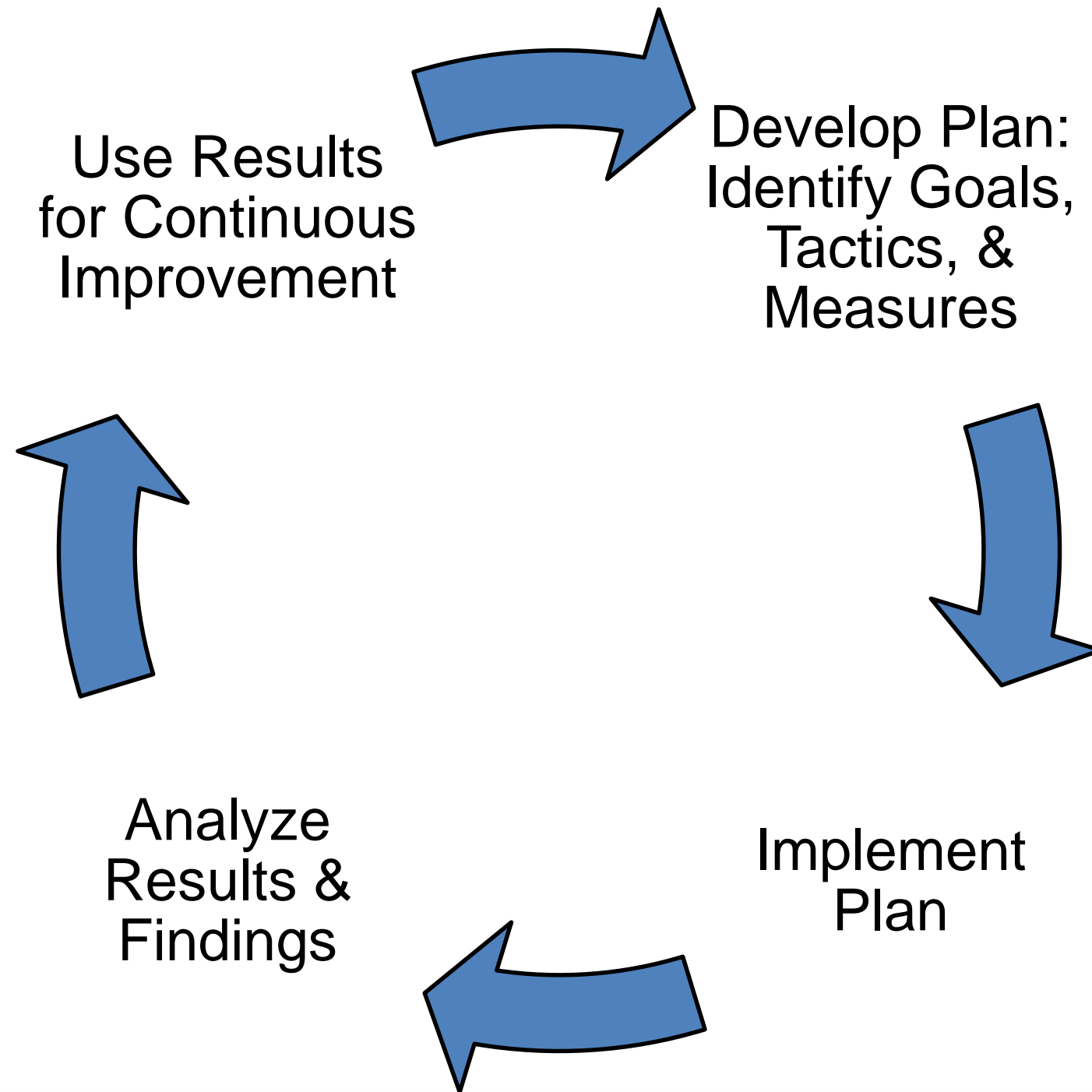
- Understand how planning has been conducted within your college/school
- Engage all departments/units in the development of the plan
- Represent all departments/units in the plan

## Externally

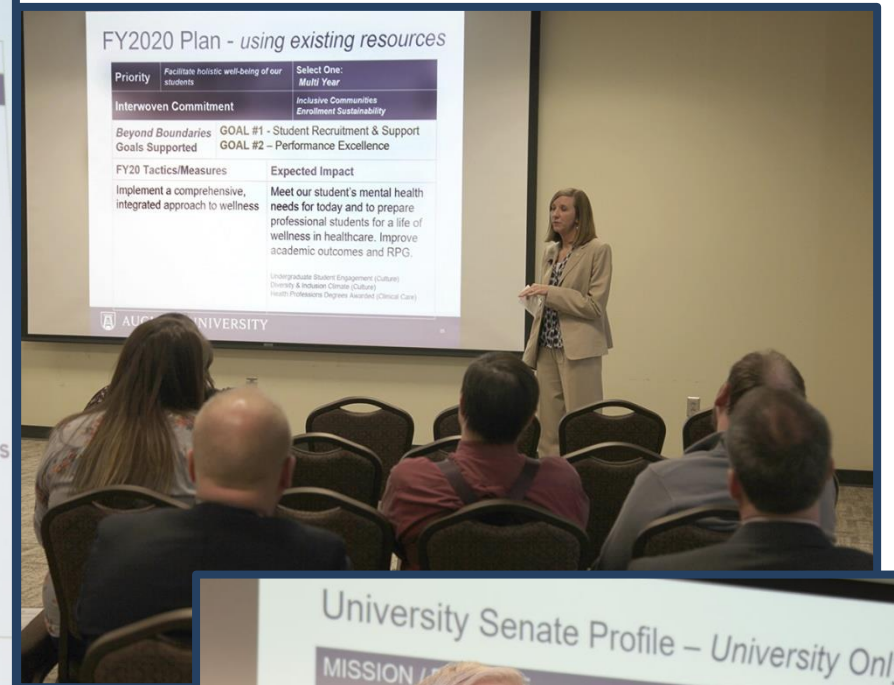
- Identify and plan with Institutional Collaborators



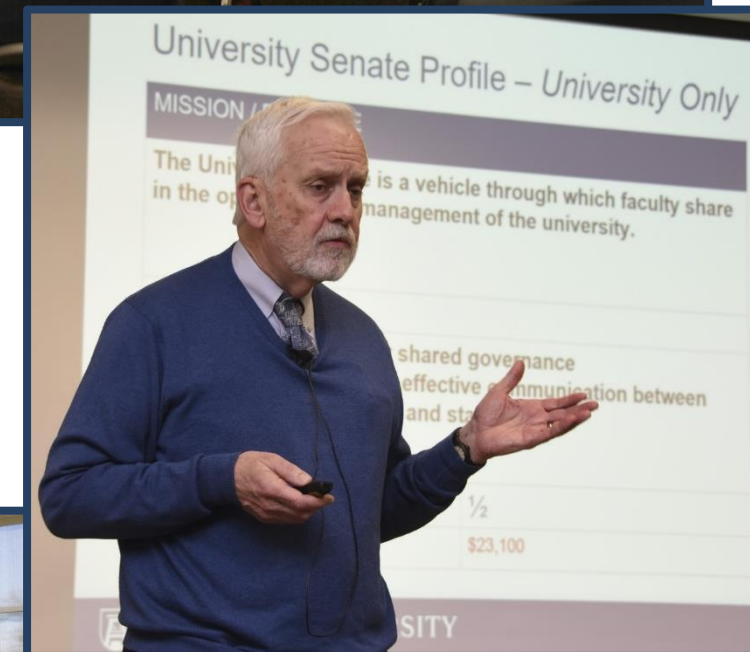
# Planning, Resource Alignment, and Assessment Cycle







# Planning & Resource Alignment Hearings





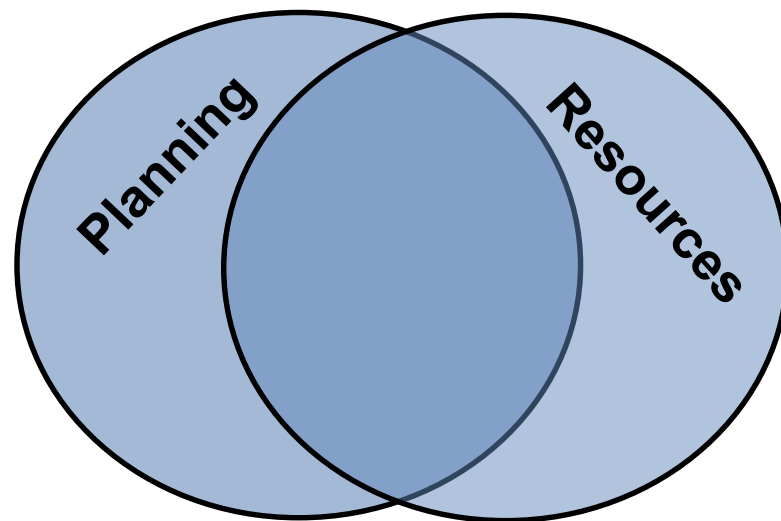
# Purpose of Hearings: Institutional Objective

Augusta University will foster open and transparent communication of colleges'/schools' and units' accomplishments, challenges, and priorities and of the actions taken to align and prioritize support of colleges'/schools' and units' goals identified within the University's unit planning processes.

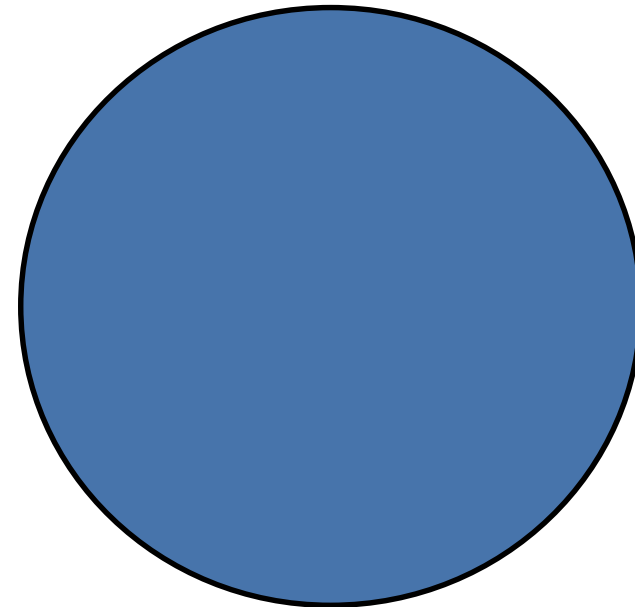


# Planning Integration

CURRENT



ASPIRATION

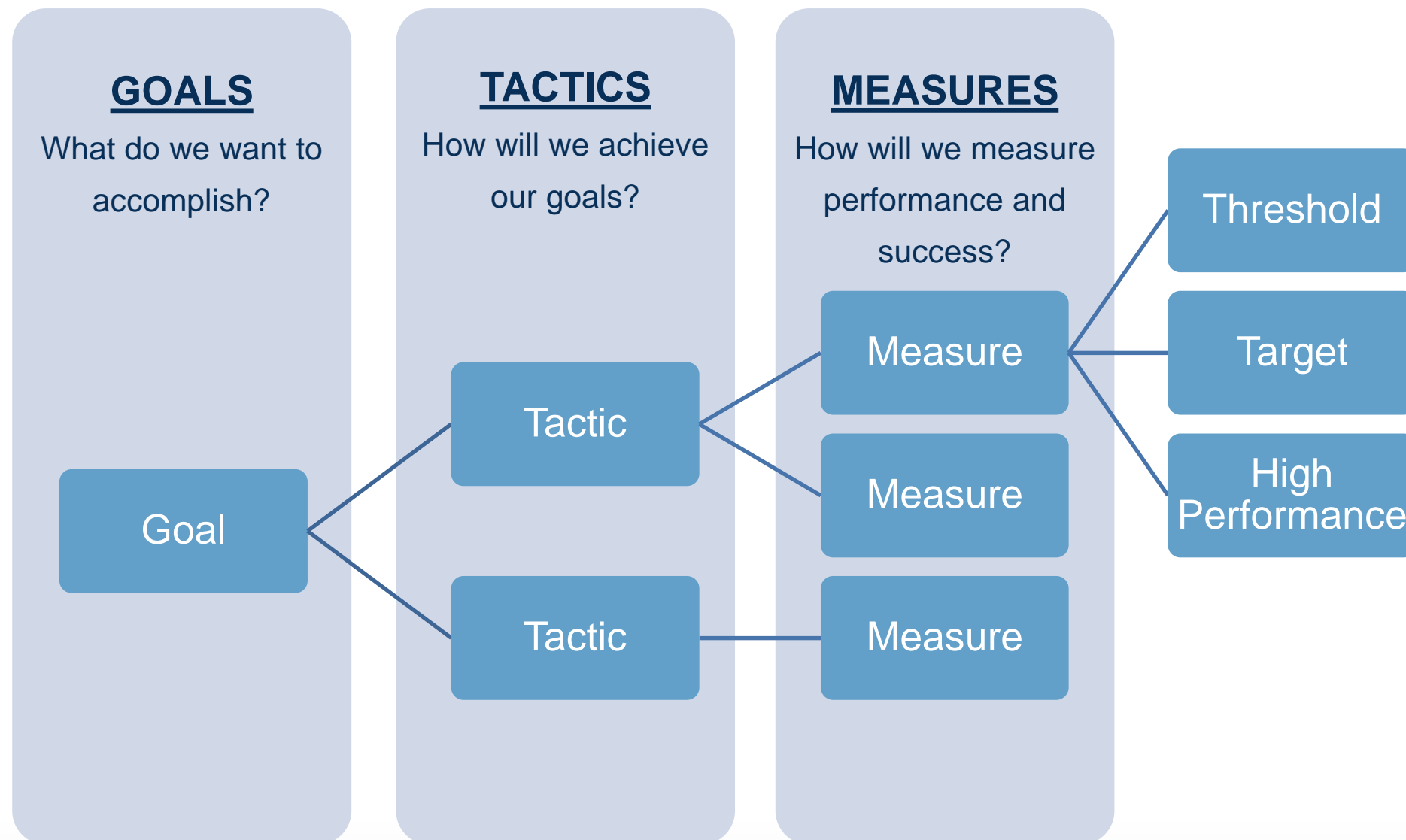


# Annual Unit Planning Specifics

- **Planning Framework**
- **S.M.A.R.T. Principles**

# Planning Framework

About 32 Major Administrative Planning Divisions



# S.M.A.R.T. Principles

**Planning should be S.M.A.R.T.**

Specific

Measurable

Attainable

Relevant

Time Bound

# S.M.A.R.T. Tactics – General Example

## *Addressing a Goal Focused on Cultivating Healthy Habits*

“Improve running ability.”



S.M.A.R.T. Tactic

S.M.A.R.T. Outline	S.M.A.R.T. Tactic
<b>Specific</b> <ul style="list-style-type: none"><li>What is the desired result? (who, what, when, why, how)</li></ul>	Run the Virtual Chilly Willy 5K on January 16, 2021, without stopping.
<b>Measurable</b> <ul style="list-style-type: none"><li>How can you quantify (numerically or descriptively) completion?</li><li>How can you measure progress?</li></ul>	Run the Virtual Chilly Willy <b>5K</b> on <b>January 16, 2021</b> , <b>without stopping</b> .
<b>Achievable</b> <ul style="list-style-type: none"><li>What skills are needed?</li><li>What resources are necessary?</li><li>How does the environment impact goal achievement?</li><li>Does the goal require the right amount of effort?</li></ul>	Run the Virtual Chilly Willy 5K on January 16, 2021, without stopping. <ul style="list-style-type: none"><li><b><u>Time</u>: Allows 10 weeks to train</b></li><li><b><u>Resources</u>: local trails, gym, running gear, etc.</b></li><li><b><u>Environment</u>: Virtual setting</b></li><li><b><u>Training</u>: online research, knowledge sharing, etc.</b></li></ul>
<b>Relevant</b> <ul style="list-style-type: none"><li>Is the goal in alignment with the overall strategic plan?</li></ul>	Run the Virtual Chilly Willy 5K on January 16, 2021, without stopping. <b>Aligns to personal health goal</b>
<b>Time-bound</b> <ul style="list-style-type: none"><li>Is there a clearly defined timeline including a target date for attainment?</li></ul>	Run the Virtual Chilly Willy 5K on <b>January 16, 2021</b> , without stopping.



# Specific Measures

**S.M.A.R.T. Tactic:** In FY21, the Associate Dean for Research and Graduate Studies will work with all the directors of CSM graduate programs to review and revise their graduate handbooks as needed.

Measure 1: Graduate Program Directors will complete reviews of their program's handbooks and submit suggested revisions to Associate Dean for Research and Graduate Studies.

Threshold: May 14, 2021	Target: April 16, 2021	High Performance: March 19, 2021
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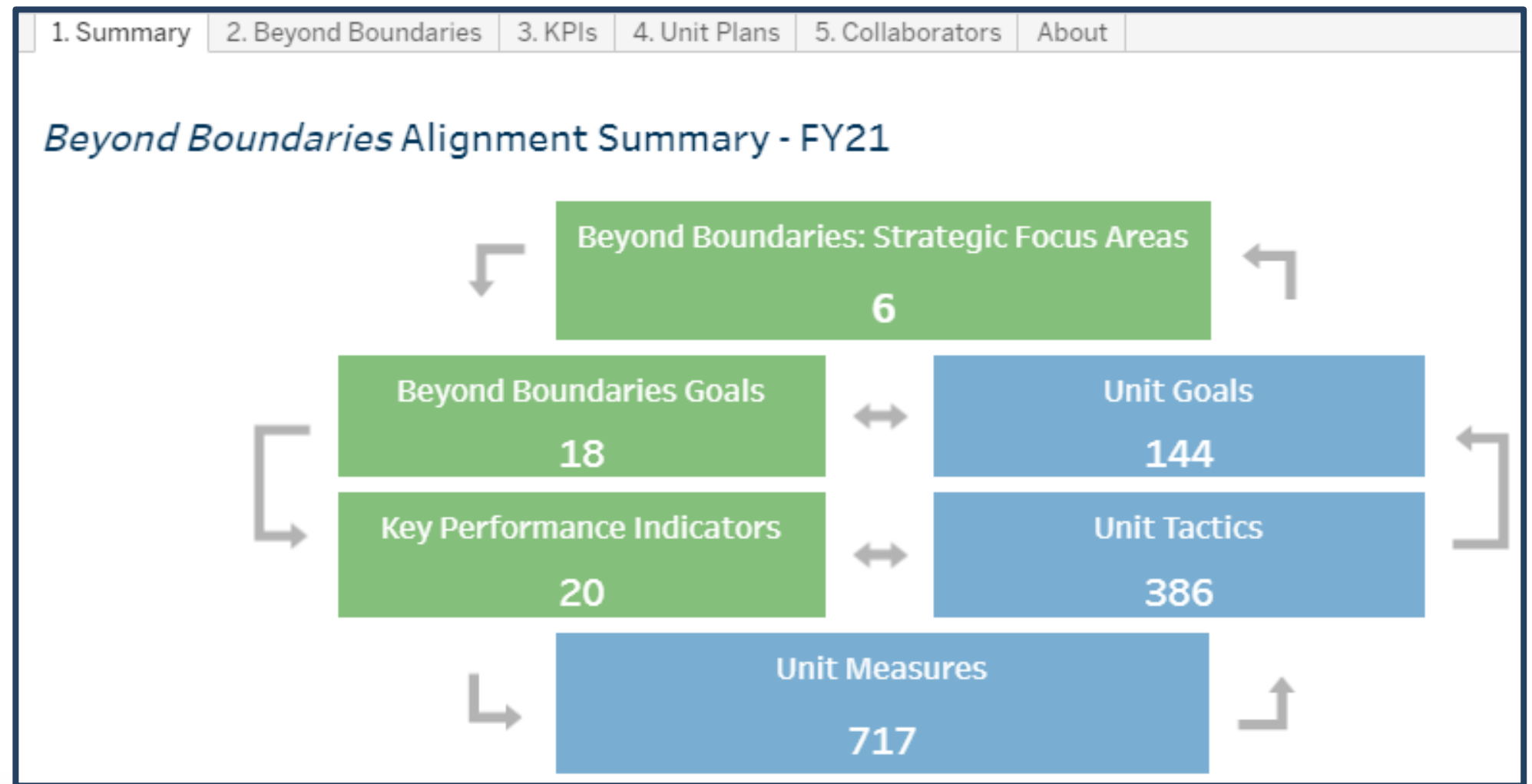
Measure 2: Feedback from students in the Graduate programs related to their satisfaction on the usefulness and completeness of the information in the Graduate handbook for their program.

<u>Threshold:</u> 50% Satisfied	<u>Target:</u> 75% Satisfied	<u>High Performance:</u> 100% Satisfied
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# Planning – Transparency

## FY20 and FY21 Integrated Planning Tableau Workbooks

- Visual for all unit plans, alignment, and progress
- Access through [www.augusta.edu/planning](http://www.augusta.edu/planning)





# Planning – Reporting Tool

## Anthology (formerly Campus Labs)



- **Planning Module**

- Houses Integrated Planning information
- Houses Student Learning Outcome (SLO) Assessment information
- Can be customized to support your planning needs

- **Support**

- Razel Foster
  - [racfoster@augusta.edu](mailto:racfoster@augusta.edu)
  - 706-721-3257
- User Guide and Video

# Planning – Support

## IE Integrated Planning Webpage

- Strategic Planning
- Annual Unit Planning, including Planning & Resource Alignment
- Webpage

## Planning Support

- Brittany Cipollone
  - 706-721-6157
  - [bcipollo@augusta.edu](mailto:bcipollo@augusta.edu)