Integrated Planning Overview
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
- Jiu Jitsu Tournament
- Financial Future
- Medicine, Food, and Supplies for Family during Pandemic
- 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

SACS COC
Planning Integration

**Beyond Boundaries Strategic Plan**
- Education
- Research & Scholarship
- Clinical Care
- Outreach & Economic Development
- Institutional Culture & Engagement
- Financial Sustainability

**Annual Unit Plans**
- Goals
- Tactics
- Measures

**USG Strategic Plan 2020-2024**
- Student Success
- Responsible Stewardship
- Economic Competitiveness
- Community Impact
USG Strategic Plan 2024 - Goals

STUDENT SUCCESS

RESPONSIBLE STEWARDSHIP

ECONOMIC COMPETITIVENESS

COMMUNITY IMPACT

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

**COMMUNITY IMPACT**

- **Metrics**
  - Number of graduates in health professions
  - Number of student enrollments in experiential learning courses

**Strategic Initiatives**

- **ECONOMIC COMPETITIVENESS**
  - Redesign General Education Curriculum
  - Expand Nexus Degrees

- **COMMUNITY IMPACT**
  - Increase the Number of Graduates in Health Professions
  - Expand Experiential Learning Opportunities
AU Strategic Plan

KEY PERFORMANCE INDICATORS

Strategic Priorities

INSTITUTIONAL CULTURE

EDUCATION

FINANCIAL SUSTAINABILITY

RESEARCH & SCHOLARSHIP

CLINICAL CARE

OUTREACH & ECONOMIC DEVELOPMENT

Organizational Goals
<table>
<thead>
<tr>
<th>AU Strategic Plan: Organizational Goals</th>
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<tbody>
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<td><strong>EDUCATION</strong></td>
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<tr>
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<td><strong>FINANCIAL SUSTAINABILITY</strong></td>
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# 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

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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

Develop Plan: Identify Goals, Tactics, & Measures

Use Results for Continuous Improvement

Implement Plan

Analyze Results & Findings

Use Results for Continuous Improvement
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

Planning
Resources
Annual Unit Planning Specifics

• Planning Framework

• S.M.A.R.T. Principles
Planning Framework

About 32 Major Administrative Planning Divisions

**GOALS**
What do we want to accomplish?

**TACTICS**
How will we achieve our goals?

**MEASURES**
How will we measure performance and success?

- Tactic
- Measure
- Threshold
- Target
- High Performance
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**

<table>
<thead>
<tr>
<th>S.M.A.R.T. Outline</th>
<th>S.M.A.R.T. Tactic</th>
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<tbody>
<tr>
<td><strong>Specific</strong></td>
<td>• What is the desired result? (who, what, when, why, how)</td>
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<tr>
<td>• Run the Virtual Chilly Willy 5K on January 16, 2021, without stopping.</td>
<td></td>
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<td><strong>Measurable</strong></td>
<td>• How can you quantify (numerically or descriptively) completion?</td>
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<td>• How can you measure progress?</td>
<td>• Run the Virtual Chilly Willy 5K on January 16, 2021, without stopping.</td>
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<td><strong>Achievable</strong></td>
<td>• What skills are needed?</td>
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<td>• What resources are necessary?</td>
<td>• Run the Virtual Chilly Willy 5K on January 16, 2021, without stopping.</td>
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<td>• How does the environment impact goal achievement?</td>
<td>• <strong>Time:</strong> Allows 10 weeks to train</td>
</tr>
<tr>
<td>• Does the goal require the right amount of effort?</td>
<td>• <strong>Resources:</strong> local trails, gym, running gear, etc.</td>
</tr>
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<td><strong>Relevant</strong></td>
<td>• Is the goal in alignment with the overall strategic plan?</td>
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<tr>
<td><strong>Time-bound</strong></td>
<td>• Run the Virtual Chilly Willy 5K on January 16, 2021, without stopping.</td>
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<tr>
<td>• Is there a clearly defined timeline including a target date for attainment?</td>
<td>Aligns to personal health goal</td>
</tr>
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</table>
## 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.

<table>
<thead>
<tr>
<th>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.</th>
</tr>
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<tr>
<td><strong>Threshold:</strong> May 14, 2021</td>
</tr>
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</table>

<table>
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<th>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.</th>
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<tr>
<td><strong>Threshold:</strong> 50% Satisfied</td>
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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
Planning – Reporting Tool

Anthology (formerly Campus Labs)

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

• Support
  o Razel Foster
    ▪ racfoster@augusta.edu
    ▪ 706-721-3257
  o 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