Four Phases of IE Planning

Phase I: Pre-Planning
- Laying the Foundation
  - 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

Phase II: Planning
- Develop Strategic Plan
  - 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 1
Four Phases: Developing IE Strategic Plans, Year 2 & 3

Phase III: Implementation

- Formal Implementation of Strategic IE Plans

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

Phase IV: Evaluation & Assessment

- Recurring Continuous Evaluation & Assessment

- 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?