Agenda

1. Strategic Planning
   • Integrated Planning Cycle
   • What is Strategic Planning?
   • Planning Methodology
   • AUC’s Revised Strategic Priorities
   • Strategic Planning and Assessment Steps
   • Planning & Assessment Timeline

2. Assessment of Progress of Strategic Plan
   • What is Assessment?
   • Why do we Assess?
   • Levels of Assessment
   • What is an Assessment Report?
   • Assessment Process
   • Creating Assessment Measures
   • Analysis and Using Results
   • Planning & Assessment Timeline

3. Planning and Assessment Software Demo (Compliance-Assist)

4. Support and Hotline
Integrated Planning Cycle

- Planning
- Assessment
- Resource Allocation
- Results
- Implementation
WHAT IS STRATEGIC PLANNING?

**Strategic** plan is a management tool that serves the purpose of helping an organization do a better job, because a plan focuses the energy, resources, and time of everyone in the organization in the same direction.
WHY DO WE NEED TO PLAN?

- Provides focus and direction to move from plan to action
- Prioritizes your financial needs
- Communicates your strategy to faculty, students and staff
- Helps build your competitive advantage
PLANNING AND ASSESSMENT TIMELINE

- **Nov. 7**
  - **First cut-off of goals** (to be uploaded to the Planning Matrix)

- **Nov. 16**
  - **Second cut-off of goals** (to be uploaded to the Planning Matrix)

- **Nov. 30**
  - **Complete all missing planning components and report on results on Compliance-Assist**
PLANNING METHODOLOGY

University Strategic Plan

Academic Strategic Plan

Schools Strategic Plans

Departments Strategic Plans
AUC’S REVISED STRATEGIC PRIORITIES

- Quality of Education
- Innovation
- Internationalization
- AUC Experience
- Institutional Effectiveness
Strategic Planning and Assessment Steps

1. Mission
2. Environmental Scan
3. Goals
4. Objectives
5. Assessment (KPIs, Targets, Results)
6. Resources
7. Strategies/Action Items
Strategic Planning and Assessment Steps

Mission
• 1-3 sentences that outline the purpose of the unit and how the unit helps the university achieve its mission.
• May also include vision and core values
  • Vision
    • How the organization will look like in the future
  • Core Values
    • Shared beliefs that provide a framework for decision-making
AUC’s Mission
The American University in Cairo (AUC) is a premier English-language institution of higher learning. The university is committed to teaching and research of the highest caliber, and offers exceptional liberal arts and professional education in a cross-cultural environment. AUC builds a culture of leadership, lifelong learning, continuing education and service among its graduates, and is dedicated to making significant contributions to Egypt and the international community in diverse fields. Chartered and accredited in the United States and Egypt, it is an independent, not-for-profit, equal-opportunity institution. AUC upholds the principles of academic freedom and is dedicated to excellence.
DAIR’s Mission
The Office of Data Analytics and Institutional Research (DAIR) advances the mission and values of The American University in Cairo by facilitating evidence-based decisions and a culture of assessment and integrated planning. DAIR is the University’s official source of information about itself, its peers and its educational environment.

JRMSC’s Mission
Our mission is to provide outstanding undergraduate and graduate education and professional training, and to be a center for research and innovation in the fast-evolving fields of journalism and mass communication. The department prepares students for successful careers in the media and related fields throughout the world by combining an excellent liberal arts education with advanced technical training in a cross-cultural environment.
AUC’s Vision
Our vision is to be a world-class university internationally recognized for its leadership and excellence in teaching, research, creative expression, and service.

AUC’s Values
• Excellence
• Diversity
• Social Responsibility
• Integrity
• Lifelong Learning
Strategic Planning and Assessment Steps - **Environmental Scan**

- **Strengths**
  - What advantages does your unit have?

- **Weaknesses**
  - What could you improve? What should you avoid?

- **Opportunities**
  - What opportunities might your strengths create?

- **Threats**
  - What obstacles does your unit face?

**SWOT**
Strategic Planning and Assessment Steps – Example

Strengths
AUC’s reputation, diversity of faculty

Weaknesses
Location of the new campus from downtown

Opportunities
AUC’s location in one of the most important cities in the world

Threats
Long commute time, increasing competition
Goals
• Where do you want to be at the end of the plan?
• Goals should be “big picture items”
• Not necessarily time-bound
• Not more than three to five
• Relate to the university goals
Strategic Planning and Assessment Steps

**Goals**

- **Example (DAIR):** The university community is provided with cutting edge research related to higher education effectiveness and impact and best practices in the region, especially in the area of accreditation and research.
- **Example (JRMС):** The JRMС department will build strong and ongoing linkages with JRMС alumni and the media industry.
Objectives

- Specific outcomes items that are to be achieved. More concrete and specific than goals.
- Objectives must be SMART (specific, measurable, achievable, realistic, and time-bound).
- Each goal may have several objectives.
Strategic Planning and Assessment Steps

**Strategies**
• The specific actions your unit will take to achieve your objective

**Required Resources**
• Budget, faculty, staff, space...etc

**Assessment**
• Identify Key performance indicators (KPIs/Assessment Measures) benchmarks for each objective
• Set targets
• Report on results
What’s wrong in this example?

• **Goal 1:** The university community is provided with cutting edge research related to higher education effectiveness and impact and best practices in the region, especially in the area of accreditation and research.

  • **Objective 1.1:** DAIR will initiate institutional research projects that meet identified needs of the university.

    • **Strategies:** DAIR will meet with senior administrators to identify high priority research topics. DAIR will develop teams to complete each project.
    • **Resources:** None
    • **KPIs:** The number of research projects that will be initiated and completed each year.
    • **Target:** At least two
Strategic Planning and Assessment Steps

Correct Example

• **Goal 1:** The university community is provided with cutting edge research related to higher education effectiveness and impact and best practices in the region, especially in the area of accreditation and research.

  • **Objective 1.1:** DAIR will initiate at least two institutional research projects that meet identified needs of the university per year.
    • **Strategies:** DAIR will meet with senior administrators to identify high priority research topics. DAIR will develop teams to complete each project.
    • **Resources:** None
    • **KPIs:** The number of research projects that will be initiated and completed each year.
    • **Target:** At least two
Activity 1

Goals Discussion: 10 Minutes

Objectives Discussion: 10 Minutes

Strategic and Resources: 10 Minutes
ASSESSMENT

Reporting on Progress of Strategic Goals
WHAT IS ASSESSMENT?

**PLAN:** Develop clear learning objectives

**DO:** Offer courses, programs, student services

**CHECK:** Assess progress

**ACT:** Use results

**DO:** Collect data

Today’s Session
WHY DO WE ASSESS?

1. Helps us know if we are doing what we are supposed to be doing.
2. Provides evidence that AUC is actively monitoring its progress towards its goals and achieving its mission.
3. Required by accreditation bodies.
4. Assessment results provide valuable information to help in decision-making.
LEVELS OF ASSESSMENT

1. Course Level Assessment
2. Program Level Assessment
3. Department/School Level Assessment
4. Institutional Level Assessment
What is an Assessment Report?

1. A summary of assessment activities from the previous academic year.
2. A summary of results from the previous academic year.
3. Evidence that results are used to improve, plan.
4. An action plan for implementing changes based on results.

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ASSESSMENT PROCESS

Create Assessment Measures

Conduct Assessment

Collect Data

Analyze Results

Create Action Plan
CREATE ASSESSMENT MEASURES
WHAT CAN THEY MEASURE?

Tracking participation/productivity – e.g. track participation in programs or services
  • Example of Assessment Measure: KPIs

Program Effectiveness – e.g. level of satisfaction, involvement, effectiveness, helpfulness, etc.
  • Examples of Assessment Measure: survey, focus group, KPIs such as the number of complaints

Attitudes towards program/service – assess how a participant will think, feel, or act differently as a result of your program/course/service
  • Example of Assessment measure: “quiz type” survey
Type of Assessment Measures

**Direct**
- Requires subjects to display their knowledge, behavior or thoughts
- Where on campus would you go if you had a problem with registering for one of your courses?
- What documents are needed to apply for a scholarship?

**Indirect**
- Requires subjects to reflect on their knowledge, behavior or thoughts
- I can identify where on campus to go if I had a problem with registering for one of my courses.
- I can identify what documents I need to apply for a scholarship (Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree)
EXAMPLES OF ASSESSMENT MEASURES

Objective

- Students are served in an effective, courteous, and professional manner
- Students will demonstrate increased awareness of financial aid opportunities

Assessment Measures

- 1. Number of complaints
- 2. Student survey
- 1. Student “quiz type” survey
- 2. Student satisfaction survey
ANALYSIS & HOW TO USE RESULTS
WHAT SHOULD YOU LOOK FOR IN YOUR DATA?

- Reasons why we haven't met our targets
- Achievement
  - Any Others?
  - Effectiveness of assessment measures
- Change over time
  - Any Others?
- Maximize on good results
- Difference between groups
  - Any Others?

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POSSIBLE RESPONSES TO ASSESSMENT RESULTS:

1. **No Changes Needed**
2. **Change in Goal or Objective**
3. **Change in Program or Service**
4. **Change in Assessment Measures**
HOW TO USE ASSESSMENT RESULTS TO MAKE CHANGES

PROCEDURE-RELATED EXAMPLES
✓ Revise advising standards or processes
✓ Revise admission criteria

RESOURCE-RELATED EXAMPLES
✓ Hire or re-assign faculty and/or staff
✓ Increase space

CURRICULUM-RELATED EXAMPLES (ACADEMIC)
✓ Revise course content or assignments
✓ Modify frequency or schedule of course offerings
✓ Add or delete course(s)
WHAT SHOULD YOU DO.....

BEFORE COLLECTING DATA/EVIDENCE?

✓ DISCUSS “CRITERIA FOR SUCCESS”
✓ CONSIDER POSSIBLE WAYS RESULTS COULD BE USED

AFTER GETTING RESULTS?

✓ INVOLVE THE DEPARTMENT IN DISCUSSING THE RESULTS AND DECIDING WHAT IMPROVEMENTS ARE NEEDED
✓ CREATE AN IMPROVEMENT PLAN
WHAT DO YOU NEED TO DO?

**Results**
- Briefly explain the results of your conducted assessment in a clear and concise manner.

**Analysis**
- Briefly summarize the data analysis and use of results. Write out a well-reasoned description of your conclusions based on the data by explaining the significance and impact of the results.

**Action Plan**
- Briefly summarize the actions for improvement. Describe what decisions need to be made, next steps that will be taken during the following academic year, and explain how the results are being used to inform unit changes.
TIPS TO HELP YOU SUBMIT A GOOD REPORT

A. RESULTS ARE SUMMARIZED IN A CLEAR, CONCISE MANNER USING COUNTS AND PERCENTAGES, IF APPROPRIATE.

B. CRITERIA FOR SUCCESS ARE ESTABLISHED, E.G., THE PERCENT OF SURVEY RESPONSES NEEDED TO DECLARE AN OUTCOME/GOAL HAS BEEN ACHIEVED.

C. THE (PLANNED) ACTIONS AND/OR CHANGES MATCH WITH THE RESULTS.

D. A SPECIFIC IMPROVEMENT (ACTION) PLAN IS GIVEN.
REMEMBER!
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Activity 2
Assessing the Progress of Your Strategic Plan

Assessment Measures: 10 Minutes
Analyzing Results: 10 Minutes
Discussion and Use of Results: 10 Minutes
PLANNING AND ASSESSMENT SOFTWARE

Login

- HTTPS://AUCEGYPT.COMPLIANCE-ASSIST.COM
- ENTER YOUR CREDENTIALS TO LOG IN
ASSESSMENT RESOURCES & SUPPORT

- Integrated Strategic Planning and Assessment Guidelines
- Consultation s & training sessions
- Data, KPIs, benchmarks and research
- Standard Templates
- Planning & Assessment Software (Compliance-Assist)
- Institutional surveys:
  - Annual surveys
  - Cyclic Surveys
HOTLINE AND SUPPORT

FOR PLANNING:

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FOR ASSESSMENT:

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Thank you

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