Agenda

• **Part 1 (40mins)**
  • Integrated Planning Cycle
  • Why Strategic Planning?
  • Planning Methodology
  • Strategic Planning and Assessment Steps
  • How to Proceed?
  • What DAIR has to Offer
  • Proposed Timeline

• **Break (10mins)**

• **Part 2 (40mins)**
  • Planning and Assessment Software Hands-on (Compliance-Assist)
Integrated Planning Cycle

Planning

Assessment

Resource Allocation

Results

Implementation
Why 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.

• It also:
  • Helps build your competitive advantage
  • Communicates your strategy to faculty, students and staff
  • Prioritizes your financial needs
  • Provides focus and direction to move from plan to action
Planning Methodology

University Strategic Plan

Academic Strategic Plan

Schools Strategic Plans

Departments Strategic Plans
Strategic Planning and Assessment Steps

1. Mission
2. Environmental Scan
3. Goals
4. Objectives
   - Assessment (KPIs, Targets, Results)
   - Resources
   - 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.
Strategic Planning and Assessment Steps

**SSE’s Mission**
To provide top-notch science and/or engineering education within a liberal arts context to national and international talented students who aspire to become innovative and responsible leaders in industry, academia and government.

**JRMC’s Mission (2010-2014)**
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?

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

**SWOT**
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 (JRMC): The JRMC department will build strong and ongoing linkages with JRMC 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
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
How to Proceed?

• Involve faculty/staff

• **Small units:**
  • Series of collegial, face to face meetings
  • Review past plans, discuss accomplishments, SWOT

• **Large units:**
  • Set up planning team representing various majors, activities, and staffing levels
  • Town-hall meetings or community forums can be helpful as well as multiple small-group gatherings.
  • A SWOT analysis can sent out in an email, Google doc, or surveys to the group
  • Each colleague should have the opportunity to comment on the plan draft
What DAIR has to Offer

- Facilitate planning, tracking, assessing and reporting on the implementation of plans
- Provide data and prepare research in support of planning
- Prepare institutional dashboard indicators and other performance tracking
- Provide planning and assessment software (Compliance-Assist)
- Provide standard templates
Proposed Timeline

Feb. – Mar., 2016
- Conduct training sessions on Compliance-Assist (DAIR)
- Provide data/research request in support of planning (DAIR)

April, 2016
- Deadline to submit 2017-2019 plans on Compliance-Assist (Schools/Departments)

1 Year Later
- Deadline to submit reports on the progress of the plans on Compliance-Assist (Schools/Departments)
Break – 10 mins.
Planning and Assessment Software

Login

• [https://aucegypt.compliance-assist.com](https://aucegypt.compliance-assist.com)
• Enter your credentials to log in
Planning and Assessment Software

Planning Module

- Click on Planning
Planning and Assessment Software

Strategic Plans

• Click on “Institution” tab
• Then click on “Strategic Plans” tab
Planning and Assessment Software

Unit and Fiscal Year

• Adjust your fiscal year by clicking on “Edit Filter” button
• Choose your unit from the left pane
Planning and Assessment Software

Add Strategic Planning Components

• From the right pane, click on add “New Item”
• Choose the component you want to add
Planning and Assessment Software

Add Unit Mission

• Enter mission title, mission statement, vision statement, start and end dates, progress of your mission, and the responsible roles
• Click save and close
Planning and Assessment Software

Add Unit Environmental Scan

- Enter title, start and end dates, progress, responsible roles, strengths, weaknesses, opportunities and threats of your unit
- Click save and close
Add Unit Goal

• Enter goal number, goal title, goal statement, start and end dates, the responsible roles, and progress
• Click save and close
Planning and Assessment Software

**Add Unit Objective**

- Enter objective number, objective title, objective description, start and end dates, responsible roles, progress.....
Planning and Assessment Software

Add Unit Objective

• Enter strategies, resources required, funding strategy, space/facilities implications, KPIs, targets and progress
• Click save and close
Planning and Assessment Software

Edit and Delete Items

- Open existing item
- To edit, click on the edit tab, then edit fields
- To Delete, click on the edit tab, then on the delete button
Planning and Assessment Software

Extract Reports

• Click on the “Reports” tab
• Generate the “Unit Strategic Plan” report
• Choose the format (xls, doc, or pdf)
Planning and Assessment Software

Academic Strategic Priorities 2015-2019

The American University in Cairo
Provost

ACAD-GOAL1: EDUCATION
- Creating a unique learning experience for students that provides a global education with strong interactions among Arts, Business, Engineering, Humanities, Public Policy, Sciences and Social Sciences
- Enhancing capacity to develop interactive, sciences and interdisciplinary programs that integrate the community into the curriculum
- Emphasizing experiential learning
- Developing global citizenship

Starts: 7/1/2015
Ends: 6/30/2018
Responsible Roles: Provost (Sadig, Esfah)
Progress: Ongoing
Related Items
1: Make Our Place in the World: Egypt's Global University
2: Unleash Learning: Opening the AUC Classroom
3: Location, Location, Location: AUC as an Anchor and a Magnet

ACAD-GOAL2: RESEARCH
- Emphasizing AUC's competitive edge in research
- Utilizing available research efficently
- Encouraging cross-disciplinary and interdisciplinary interactions
- Bridging the gap between "The Academic" and "The Community"
- Addressing major economic and social challenges locally, regionally and Internationally
- Creating our own intellectual property

Starts: 7/1/2015
Ends: 6/30/2018
Responsible Roles: Provost (Sadig, Esfah)
Progress: Ongoing
Related Items
1: Make Our Place in the World: Egypt's Global University
3: Location, Location, Location: AUC as an Anchor and a Magnet
4: Instilling Integrity, Accountability and Sustainability: Managing Continuous Change

ACAD-GOAL3: STUDENT ACCESS

- Strategic enrollment management
- Recruiting and retaining a diverse mix of talented students

Starts: 7/1/2015
Ends: 6/30/2018
Responsible Roles: Provost (Sadig, Esfah)
Progress: Ongoing
Related Items
1: Make Our Place in the World: Egypt's Global University

ACAD-GOAL4: SOCIAL ENGAGEMENT
- Enhance public engagement to support talented students
- Establish and maintain the university's profile as an asset to Egypt and the world

Starts: 7/1/2015
Ends: 6/30/2018
Responsible Roles: Provost (Sadig, Esfah)
Progress: Ongoing
Related Items
3: Location, Location, Location: AUC as an Anchor and a Magnet
4: Instilling Integrity, Accountability and Sustainability: Managing Continuous Change

ACAD-GOALS: FACULTY
- Recruit, develop and retain excellent faculty
- Ensure competitive faculty compensation
- Ensure fair and realistic benefits

Starts: 7/1/2015
Ends: 6/30/2018
Responsible Roles: Provost (Sadig, Esfah)
Progress: Ongoing
Related Items
1: Make Our Place in the World: Egypt's Global University

ACAD-ACTION-PLAN1.1: Restructuring Programs
Starts: 7/1/2015
Ends: 6/30/2018
Responsible Roles: Provost (Sadig, Esfah)
Progress: Ongoing
Strategies
For more questions, please contact: Alia Mitkees amitkees@aucegypt.edu, ext. 2215
Thank you

THE AMERICAN UNIVERSITY IN CAIRO (AUC)
DATA ANALYTICS AND INSTITUTIONAL RESEARCH (DAIR)