Western Michigan University Strategic Plan
Mid-Year Report

Prepared by the Office of Institutional Effectiveness:

Jody Brylinsky, Ph.D.
Associate Provost for Institutional Effectiveness

Brynne Belinger, MBA
Manager for Institutional Accreditation and Planning

January 14, 2015
TABLE OF CONTENTS

Executive Summary ............................................................................................................................................... 3
Update on Year Three Implementation Recommendations ................................................................. 4
  Tactical Action Community Recommendations from the Previous Year ........................................... 5
Priority Initiatives Aligned with Change in Institutional Effectiveness Measures .............................. 6
  Senior Leadership Priority Initiatives and Success Measures .............................................................. 6
Tactical Action Communities and Project Action Teams ......................................................................... 10
Analysis of 2014-205 Mid-year Strategic Initiatives ................................................................................... 11
  Data Collection Process 2014-15 ................................................................................................................ 11
  Three Year Information Comparison ....................................................................................................... 11
  Complete Set of 2014-15 Initiatives ......................................................................................................... 14
    Priority Initiative Summary .................................................................................................................. 14
  Analysis of Strategic Management Maturity and Transition to 2020 Goals....................................... 15
Transition to new Planning Cycle 2015-2020 ......................................................................................... 18
EXECUTIVE SUMMARY

Western Michigan University is committed to being learner-centered, discovery-driven, and globally-engaged. Year-One (2012-13) of the University Strategic Plan (USP) implementation developed the infrastructure and processes necessary to fully embrace the three visionary pillars through an integrated strategic planning structure. The first implementation year was able to boast numerous successes which may be further explored in the Western Michigan University Strategic Plan Annual Effectiveness Report: Year-One 2012-13 (June 30, 2013) found online at http://www.wmich.edu/strategic/.

Based on analysis of implementation Year-One outcomes, the focus of the USP Year-Two (2013-14) implementation was development of an expanded communication model. The model increased transparency of the ongoing strategic planning activities, actions, and outcomes, as well as celebrated successful strategic planning initiatives. The focus also turned from strengthening core integrated strategic planning practices to greater engagement across campus leading to enhanced perception of ownership and responsibility for goal achievement. The third key change in focus was to develop meaningful metrics of success within WMU’s unit-level operating culture and strategic planning communities that drove accountability. Several implementation improvements were also achieved, such as refined technology for data collection and reporting mechanisms, modification of strategic initiatives, altered report timelines and evolution of tactical action communities (TACs) and an informal analysis of the maturity of WMU strategic planning management. The second implementation year may be further explored in the Western Michigan University Strategic Plan Annual Effectiveness Report: Year-One 2013-14 (October 2014) found online at http://www.wmich.edu/strategic/.

This mid-year report includes an update on implementation recommendations from the 2013-14 annual report and an initial account of stated priority initiatives for 2014-15. Priority initiatives of senior leadership units are highlighted in relation to noted changes in institutional effectiveness measures from 2011-12 data. Enrollment management, degree completion, and maintaining a robust global and experiential learning experience for WMU students are noted priorities. Emphasis is also indicated for increased research productivity and alumni giving.

The mid-year report will also include an update on the reduction of Tactical Actions Communities (TACs) and Project Action Teams (PATs) as strategic planning becomes more integrated into the culture of the Institution. Reflection on changes in data collection process for 2014-15 demonstrates progress toward a centralized reporting system with more consistency in terminology and accountability in reporting. Progress in both will allow for more meaningful analysis of the impact of strategic planning. Further, progress is reported on a targeted analysis of strategic plan management maturity to be used in consideration of revision of the WMU strategic plan 2020. A proposed model for how the transition process might occur is introduced in this report. The next level of planning management maturity recommends integration of strategic plan revision with enterprise risk management.
UPDATE ON YEAR THREE IMPLEMENTATION RECOMMENDATIONS

1. Fully-utilize TracDat® and SharePoint as data systems for strategic plan reporting and reduce discrepancies in data reported to TracDat® with improved scheduling and communication. In Progress (Office of Institutional Effectiveness)

2. Set institutional benchmarks in line with University mission and vision to provide clear direction for strategic planning. No Action

3. Participate in an enterprise risk management process to more formally develop a change management culture for strategic planning. In Progress (Enterprise Risk Management TAC, Office of Government Affairs)

4. Continue to review University policies and business practices to identify and then remove barriers to integrated strategic planning. No Action

5. Utilize newly-created Academic Program Review and Planning process to convey ownership and responsibility for success of the University Strategic Plan and benefits of change management linked to the plan. In Progress (Division of Academic Affairs)

6. Continue to improve communication of successful planning in order to share best practices across campus units. In Progress (University Strategic Plan Operations Team TAC)

7. Link strategic planning goals to revision of performance management practices. No Action

8. Encourage and help develop impact evaluation of overall the University Strategic Plan as well as unit specific strategies. In Progress (University Strategic Plan Operations Team TAC)


10. Increase current number of plans posted online at prescribed URL of wmich.edu/unit/planning. In Progress (Office of Institutional Effectiveness)
TACTICAL ACTION COMMUNITY RECOMMENDATIONS FROM THE PREVIOUS YEAR

1. Enterprise Risk Management (ERM)
   ▪ Risk management summit for specified WMU leaders, including President Dunn, completed December 2014.

2. Sustainability Tracking, Assessment, and Rating System (STARS)
   ▪ The work of the TAC is intended to be absorbed by the Office of Sustainability during AY 2014-15. Completed Fall 2014
   ▪ TAC recommends maintaining annual report obligations to STARS to support ongoing sustainability initiatives and reporting. In Progress

3. Student Success
   ▪ Recommends negotiating a change to the academic calendar, in the upcoming contract negotiation with AAUP, to commence the fall semester prior to Labor Day and allow for a fall semester break that will give students a four-day weekend in October. In Progress
   ▪ Recommends modifying the Early Alert System to target specific groups of students, primarily those who have low class attendance. In Progress

4. Health and Safety (Healthy Campus 2020)
   ▪ Preparing to launch the “Healthy Campus 2020” initiative which will support WMU’s tobacco-free campus goal and the health and wellness program for staff. In Progress

5. Community Outreach and Engaged Scholarship
   ▪ Proceeding with developing recommendations and needs lists to successfully complete the upcoming Carnegie Classification on Engagement. In Progress

6. Campus Climate, Diversity, Equity, and Inclusion (CCDEI)
   ▪ Institute communication of the “DMAP 2.0” in the upcoming academic year as a University priority goal. In Progress

7. University Strategic Planning Operations Team (USPOT)
   ▪ Create a toolbox of best practice resources and a team of on-campus consultants that units engaging in all levels of planning can access for assistance. In Progress
   ▪ Recommend creating a more informative, interactive website No Action
PRIORITY INITIATIVES ALIGNED WITH CHANGE IN INSTITUTIONAL EFFECTIVENESS MEASURES

Each of the Institutional Effectiveness Measures appears as part of the University scorecard based on WMU’s Carnegie Peers’ averages. The 2012-13 update of peer institutions and WMU data resulted in changes in five report card indices. Two of the noted changes were toward target, bachelor degrees awarded per 100 FYES undergraduate students and number of students participating in study abroad. Three noted areas of change are six year graduation rate, graduate degrees awarded per 100 FYES graduate students, number of seniors surveyed that participated in community service. Five additional measures remained unchanged but are more than two tolerances below target: annual change in enrollment, race/ethnic diversity as a percent of total staff, research expenditures per traditionally ranked faculty, federal research expenditures per traditionally ranked faculty, and alumni giving rate.

SENIOR LEADERSHIP PRIORITY INITIATIVES AND SUCCESS MEASURES

The priority initiatives identify progress on University Strategic Plan goals. The president and each of his senior leadership staff were asked to identify a list of priority initiatives for their divisions with respective measures of success. All priority initiatives have been aligned with institutional effectiveness measures and USP goals. (Appendix A)

Annual change in total enrollment: The status indicator remains at red indicating a more than two tolerances below target. The actual percent change went from .016% to -1.95%.

- 4.1 Enhance diversity, promote inclusion
  - Develop and implement enrollment management through enlightened marketing, targeted student recruitment, and evidence-based student retention efforts (Division of Academic Affairs)

- 1.1 Distinctive local and global experience
  - Continue implementation of Housing Dining Master Plan through creation of residential neighborhoods and the integration of housing and dining services (Division of Student Affairs)

Race/ethnic diversity as a percent of total staff: The status indicator remains at red indicating a more than two tolerances below target. The percent race/ethnic diversity as a percent of total staff, (students and instructional staff more than one tolerance below target).

- 4.1 Enhance diversity, promote inclusion
  - Respond to Campus Climate Study recommendation, extensive list of activities posted (Office of Diversity and Inclusion; Campus Climate Diversity, Equity and Inclusion TAC)
  - Senior leadership participate in intercultural competence assessment and discussion [Intercultural Development Inventory](Office of the President)
  - Implement and assess intercultural competence curriculum in Residence Life (Division of Student Affairs)
Six-year graduation rate: The status indicator changed from partially-green to yellow indicating a drop to within one tolerance of target (average of peers). The trend changed from 55.9% to 55.7%, causing the trend indicator to change to red.

- 1.1 Distinctive local and global learning experience
  - Create an institutional culture of degree completion and success for addressing the needs of underrepresented students beginning with Kalamazoo Promise population. (Office of Diversity and Inclusion)

- 4.1 Enhance diversity, promote inclusion
  - Develop and implement enrollment management through enlightened marketing, targeted student recruitment, and evidence-based student retention. (Division of Academic Affairs) [See extensive Division of Academic Affairs Strategic Plan for more specific strategies and goals]
  - Humanities for Everybody Program with Open Doors Kalamazoo (Center for Humanities)

- 4.3 Foster University’s reputation
  - Implement new university homepage and key supporting pages directed at increased internet engagement. (Office of Government Affairs)

- 5.1 Advance economic sustainability
  - Develop a robust and effective communication and marketing strategy for University Admissions (Office of Government Affairs)

Graduate degrees awarded per 100 FYES graduate students: The status indicator changed from green to yellow indicating a drop to within one tolerance of the target (average of peers). Trend indicator remained unchanged (44.7 to 44.5).

- 1.1 Distinctive local and global experiences
  - Engage Evaluation doctoral students in research and evaluation projects (Evaluation Center)

- 1.2 Provide tools to foster success of students
  - Expand college-specific bridge courses for international graduate students by CELCIS (Haenicke Institute)
  - Create online student success guide (Student Success TAC)

Number of seniors surveyed (NSSE) that participated in study abroad: The status indicator changed from red to yellow indicating an increase to within one tolerance of the target (average of peers). The trend indicator changed from getting worse to improving (11% to 12%).

- 1.1 Distinctive local and global learning experience
  - Increase study abroad participation by participating in the national Generation Study Abroad Initiative (Haenicke Institute)

Number of seniors surveyed (NSSE) that participated in community service or volunteer work: The status indicator changed from partially-green to yellow indicating a drop to within one tolerance of the target (average of peers). Trend indicator remained unchanged, however the rate dropped from 56% to 48%.

- 1.1 Distinctive local and global learning experience
  - Increase service learning opportunities for international students (CELCIS)
• 2.1 Invigorate curricular and teaching
  o Increase the number of students involved in community service, service
    learning through various WIRE Youth Development Programs (Lewis
    Walker Institute)
• 1.2 Provide tools that foster success of students
  o Implement process for tracking, monitoring and reporting on student
    engagement and involvement in student affairs (Division of Student
    Affairs)
• 2.3 Service to university, community, profession
  o Maximize use of WMU’s Business Connection office to support growth
    in student engagement in service learning (Community Outreach and
    Engaged Scholarship TAC)
  o Host a conference to promote engagement to the community and
    professional disciplines (Transportation Research Center)
• 5.3 Advance social sustainability
  o Pursue Carnegie Classification and related activities for renewal in 2020
    (Community Outreach and Engaged Scholarship TAC)

Research expenditures per traditionally ranked faculty: The status indicator remains at red
indicating a more than two tolerances below target.
• 2.2 Innovative discovery
  o WMU Discovery Experts System utilized to increase proposal submission
    (OVPR)
  o Provide research opportunities on livable communities through 5 new
    research proposal (Transportation Research Center)
  o Develop, implement, and distribute on line content of WMU Faculty and
    staff Discovery survey.
• 3.2 Increase in research for community benefit
  o Build coalition of business sector interests to advocate for state funding
    for MI Geological Survey (Office of Government Affairs)
  o Use new Experts systems to analyze, synthesize and establish metrics and
    benchmarks for units (Office of the Vice President for Research)
  o Collaborate on research projects with researchers from 2 local and 2 state
    health department universities (Center for Health Data Research,
    Analysis, and Mapping)
  o Increase to 2 new funded projects to support CRICPE (CRICPE)
  o Launch the Authorities Topographical and Geographic Maps with US
    Government as pilot for larger project (W.E. Upjohn Center)

Federal research expenditures per traditionally ranked faculty: The status indicator remains at
red indicating a more than two tolerances below target.
• 3.2 Increase in research for community benefit
  o Develop and submit an ROI application to National Institutes of Health
    on evidenced-based practice systems in behavior health (Evaluation
    Center)
Alumni giving rate (undergraduate): The status indicator remains at red indicating a more than two tolerances below target.

- 4.3 Foster University’s reputation
  - Expand Alumni engagement efforts through special campaign – gifts to Alumni Center (Office of Development and Alumni Relations)

- 5.1 Advance economic sustainability
  - Increase overall philanthropic Support of university (Office of Development and Alumni Relations)

The Division of Academic Affairs comprises seven degree-granting colleges, seven student support units (i.e., Assessment and Undergraduate Studies, Enrollment Management, Extended University Programs, the Graduate College, Haenicke Institute for Global Education, Institutional Effectiveness, Lee Honors College, and University Libraries). An extensive division-level strategic plan has been developed to support the University Strategic Plan. (Appendix D)
TACTICAL ACTION COMMUNITIES AND PROJECT ACTION TEAMS

Overall, the number of Tactical Action Communities (TACs) has been reduced to six that continue to work on specific strategic initiatives. TACs were given instructions to focus on achieving measureable results in their project areas as WMU completes year three of the current strategic plan. All TACs were encouraged to bring recommendations forward so that senior leadership may engage existing University structures that could help implement recommendations prior to transition to new University Strategic Plan in 2015.

Campus Climate Diversity, Equity and Inclusion (CCDEI)
- Campus-wide Equity and Civility Initiative (CECI)
- Improving Campus Access
- Universal Information Technology Access
- Multicultural Mindedness
- Center for Faith, Belief and Ethics (CFBE)

Community Outreach and Engaged Scholarship
- Foundational Indicators
- Curricular Engagement
- Outreach and Partnerships

Enterprise Risk Management (ERM)
- No active PATs

Healthy Campus 2020
- Alcohol Risk Reduction Advisory Board
- Tobacco-Free Committee and Tobacco-Free Campus Implementation Committee

Student Success
- Student Success Guide
- Retention Data Research

University Strategic Planning Operations Team (USPOT)
- Communication
- Engagement
- Accountability
ANALYSIS OF 2014-205 MID-YEAR STRATEGIC INITIATIVES

DATA COLLECTION PROCESS 2014-15

Data collection and strategic plan reporting for the first year of plan implementation (2012-13) relied on form submissions via email and Webmail's briefcase system. Over the summer and fall of 2013, a small team worked to streamline and input unit responses from the year one report to TracDat®, so that progress on priorities would be reported in an efficient manner. However, the variation of terminology used to describe components of unit-level plans, and lengthy narrative responses of activities, lack of measurable outcomes continued to make reporting in TracDat® in a consistent manner difficult.

The second year of the USP was the first time the University utilized a centralized data reporting system to gather strategic planning activities and success measures. After reviewing year-end reports, it was clear that data discrepancies still existed. Although TracDat® offers a common, formulaic way to input actions, outcomes, indicators of success, and results, there were variations found in the resulting data. While the variations provide barriers to fully-assessing the progress of strategic planning goals, the progress toward a standardized self-report data system was positive.

To overcome barriers caused by inconsistencies, as well as reduce the amount of information to a more meaningful selection, the members of Senior Leadership Team, University-level centers and institutes, and Provost’s Council were the only leaders asked for updates in the third year of the USP (2014-15). Further, each leader was asked to supply only 3-5 priority initiatives they would be pursuing in 2014-15 that advanced the USP, or the Academic Affairs Strategic Plan in the case of Provost’s Council members. The submissions were made via PDF form emailed to Brynne Belinger, in the Office of Institutional Effectiveness, who then entered the submitted initiatives and associated success measures into TracDat®. In the third year, leaders were asked to classify each priority initiative as either “Impact” or “Operational” initiatives. Impact initiatives were defined as activities WMU units do, while operational initiatives were defined as how WMU units work.

The most notable changes to collecting data in the third year of the USP were the inclusion of University-level centers and institutes in request for priority initiatives and using only priority initiatives to determine strategic advancement, rather than trying to use whole unit-level strategic plans. These changes offer a clearer view of how units align to and advance the USP directly, as well as how pervasive the concept of strategic planning is in WMU’s culture.

THREE YEAR INFORMATION COMPARISON

As WMU has become more sophisticated in strategic planning, the information, both requested and received has also improved. In the first year of strategic plan reporting, University unit leaders were each asked to provide a list of activities their units had pursued or were pursuing that advanced the USP. The lists varied in length and quality, showing that clearer instructions and better reporting mechanisms were needed. From all activities that were submitted, 129 total
activities were chosen and paired with a USP strategy. Each activity was described by an adjoining narrative, but the data were difficult to measure and analyze.

In the second year of the plan, in addition to the unit-level strategic planning items reported via TracDat®, Senior Leadership Team members were asked to submit priority objectives and related success measures that their units were pursuing to advance the University Strategic Plan. The leaders reported a total of 156 objectives, and while the submissions helped streamline the information from the previous year, there were still areas for greater improvement.

The third year represents the most streamlined data collection and, notably, includes submissions of “priority initiatives” and associated success measures from University-level centers and institutes. Those reporting priority initiatives were asked to limit their submission to 3-5 total initiatives that would be pursued during the 2014-15 academic year. The Office of Institutional Effectiveness has received 114 priority initiatives to date. Those initiatives have been entered into TracDat® as the primary source for measuring USP progress.

Chart 1: Total Strategic Initiatives by USP Reporting Year
Chart 2: Total Strategic Initiatives by USP Goal and Reporting Year

<table>
<thead>
<tr>
<th></th>
<th>Goal #1</th>
<th>Goal #2</th>
<th>Goal #3</th>
<th>Goal #4</th>
<th>Goal #5</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-13</td>
<td>27</td>
<td>27</td>
<td>24</td>
<td>24</td>
<td>27</td>
</tr>
<tr>
<td>2013-14</td>
<td>9</td>
<td>28</td>
<td>37</td>
<td>30</td>
<td>52</td>
</tr>
<tr>
<td>2014-15</td>
<td>22</td>
<td>18</td>
<td>27</td>
<td>30</td>
<td>17</td>
</tr>
</tbody>
</table>
COMPLETE SET OF 2014-15 INITIATIVES

The TracDat® reports contained in Appendices B and C include charted initiative tallies for the University Strategic Plan and the Academic Affairs Strategic Plan. The information is separated by plan. A subsection of the initiatives reported to be advancing the University Strategic Plan shows the response tallies for University centers and institutes that have submitted yearly initiatives by January 7, 2015. The reports show the goals and strategies of highest focus for top-level units at WMU, with all results submitted by January 7, 2015. Further, the information shows the comparison of impact and operational initiatives that are unit priorities for the 2014-15 academic year, the third year of the University Strategic Plan.

PRIORITY INITIATIVE SUMMARY

- Of the 114 initiatives supporting the USP, 35% (n=40) are denoted as operational, while 65% (n=74) are denoted as impact. Likewise, the initiatives supporting the Academic Affairs Strategic Plan are split 44% (n=37) operational and 56% (n=47) impact.

- The University-level centers and institutes reported 63 USP-supporting initiatives with 22% (n=14) operational initiatives and 78% (n=49) impact initiatives.

- The greatest percentage of initiatives support USP Goal #4 (26%, n=30), whereas Goal #5 is supported by the fewest initiatives (15%, n=17).

- Similarly, the greatest percentage of initiatives support Academic Affairs Strategic Plan Goal #1 (29%, n=24), whereas Goal #6 is supported by the fewest initiatives (1%, n=1).

- Three unit types reported initiatives that support the USP: senior leadership, University-level centers and institutes, and Tactical Action Communities (TACs). The senior leadership submitted 39% (n=44) of the total initiatives, centers and institutes submitted 55% (n=63) of the total initiatives, and TACs submitted 6% (n=7) of the total initiatives.

- Of the University-level centers and institutes that reported initiatives, 19% (n=12) were submitted by institutes and 81% (n=51) were submitted by centers.

- Three unit types supporting the Academic Affairs Strategic Plan are degree-granting colleges, non-degree granting units, and administrative units. The degree-granting colleges submitted 43% (n=36) of the total initiatives, non-degree granting units submitted 25% (n=21) of the total initiatives, and administrative units submitted 32% (n=27) of the total initiatives.
ANALYSIS OF STRATEGIC MANAGEMENT MATURITY AND TRANSITION TO 2020 GOALS

It is clear that the University is fully-engaged in strategic planning as documented in the numerous achievements noted in annual reports. An informal assessment of GoWMU has matured in developing a culture of strategic planning that will guide decision-making resulted in the need for a more formal analysis at this critical transition phase of 2014-2015. Using the Strategic Management Maturity Model™ (SMMM™) interactive assessment, WMU appears to be at Level 3: Structured and Proactive. According to the authors of SMMM™, it is characteristic of organizations at this mid-level of maturity to have formal structures and processes in place to support engagement in strategic planning and management. The activities occur at a regular basis that may lead to varying degrees of process improvement over time. The needed accountability metrics may only be partially-aligned with strategic goals and employee priority measures. The organization has yet to fully-realize strategic planning driving focus and decision-making.

USPOT has undertaken the process of providing a formal assessment of where the institution stands in terms of maturity in strategic plan development, strategic plan management, and overall impact on the University. Report outcomes will become the focus of Year-Three implementation and planning for revision of the next iteration of the University Strategic Plan 2020. The strategic management maturity analysis will consist of formal administration of the Strategic Management Maturity Model™ (SMMM™), developed by Balanced Scorecard Institute of Cary North Carolina (http://balancedscorecard.org) to a representative sample of administrators, faculty, staff and students during the spring semester 2015. Senior leadership will also be asked to respond to 3 opened ended survey questions regarding their role in facilitating the University Strategic Plan, how their division budgeting process aligns with the University Strategic Plan, and any perceived barriers to fully implementing the University Strategic Plan. In addition, university data will be sought to support perceptions of strategic plan management relative to selected items.
<table>
<thead>
<tr>
<th>SMMM™ Dimension and Definition</th>
<th>WMU assessment strategy</th>
</tr>
</thead>
</table>
| **Leadership** – strategic planning derived from leadership that questions assumptions; proactively solves problems; creates and articulates a vision for the future | **Leaders** are seen as using strategic plan to set a clear and consistent vision  
⇒ 2014 WMU Faculty Senate Appraisal of the President item #12  
⇒ A quick 3 item survey will be taken to measure individual stakeholder awareness of the pillars and personal connection to University Strategic Plan at various campus meetings during the spring semester 2015 (e.g. WSA, APA, PSSO, Faculty Senate Council meetings, etc.)  
 **Stakeholders** accept direction from senior leadership  
⇒ 2014 WMU Faculty Senate Appraisal of the President item #20 |
| **Culture and values** – leaders and University stakeholders share understanding and agreement with stated values and vision; values are communicated, understood and practiced | **High degree of trust by stakeholders**  
⇒ Enterprise Risk Management audit results linked to strategic planning |
| **Strategic thinking and planning** – approach to planning in an dynamic and heuristic style | **Opportunities to discuss and describe items in plans at the appropriate “strategic altitude”**  
**Openness of planning process across various employee ranks and functions**  
⇒ 2014 WMU Faculty Senate Appraisal of the President item #20  
**Understanding of the distinctions between project planning and strategic planning**  
**Consistent use of planning terms and definitions**  
⇒ Content analysis of existing plans will chart use of terminology and percent of operational vs strategic initiatives  
**Awareness of how strategic planning is tied to budgeting decisions**  
⇒ Open ended survey items given to senior leadership – focus on utilization of priority-based budgeting, or discretionary funding for strategic planning |
| **Alignment** – degree to which the organization’s people and resources are focused on strategy and common vision | **People at all levels are motivated by a common vision and strategy**  
⇒ A quick 3 item survey will be taken to measure individual stakeholder awareness of the pillars and personal connection to University Strategic Plan at various campus meetings during the spring semester 2015 (e.g. WSA, APA, PSSO, Faculty Senate Council meetings, etc.) |
## Table 1 Continued

<table>
<thead>
<tr>
<th>Dimension and Definition</th>
<th>Strategic Management Maturity Item</th>
<th>WMU assessment strategy</th>
</tr>
</thead>
</table>
| Priority measurement – strategic priority measures or metrics are aligned to the strategic plan that tie to vision | ◆ Priority initiatives and measures of success are identified  
◆ Balanced set of metrics (institutional effectiveness measures) cover a range of University dimensions  
◆ Metrics focus on outcomes and results not just funding, tasks accomplished, outputs delivered  
◆ Organization and individual priority are tracked relative to planning goals  
⇒ Content analysis of existing plans will chart type and specificity of metrics  
◆ Metrics are measured and reported frequently to inform decision-making  
⇒ Compliance with mid-year and annual end of year report process. | |
| Priority management – degree to which priority metrics are used in decision-making | ◆ Use of feedback loops so unit leadership see results of planning and decisions  
◆ Strategic priority measures are available to test strategic initiatives  
⇒ Content analysis of existing plans will chart type and specificity of metrics; also consistency in developing priority metrics or understanding the need for impact measures vs. process measures | |
| Process improvement – identifying institutional structures and processes to support strategic planning | ◆ Organization has knowledge about needed improvements in data management and enterprise systems  
◆ Acceptable level of employee awareness of stakeholder (student, family, community) expectations  
◆ Institution has discussed an enterprise risk management plan  
⇒ Progress made on enterprise risk management system | |
| Sustainability of strategic management – how well the organization maintains its focus on strategic vision, plans, initiatives | ◆ People, systems and communication activities are in place to maintain the momentum of desired strategic planning  
◆ Presence of ‘strategic planning champions’ to highlight benefits of planning and success stories  
◆ A reward system is in place to support and motivate strategic planning  
⇒ Progress noted on development and implementation of a strategic planning web-page. | |
As the University begins the process of transitioning from the 2012-2015 USP, efforts are being made to fully utilize the lessons learned from the inaugural planning and implementation process. The revised University Strategic Plan will be a five year plan (WMU—2020). The USPOT TAC has proposed a five step model to facilitate a data driven and inclusive strategic planning revision process. Most notable is the integration of enterprise risk management to the analysis, planning, and implementation processes. The timeline below is an early draft proposal to be considered by WMU’s senior leaders.

Table 2: Plan Revision and Transition Timeline

<table>
<thead>
<tr>
<th>Phase</th>
<th>Activities</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Complete implementation of year three University Strategic Plan initiatives</td>
<td>• All units and TACs/PATS pursuing University Strategic Plan (USP) planned initiatives, publishing priority initiatives, posting plans on webpages</td>
<td>January – June</td>
</tr>
<tr>
<td>II. Reporting and Analysis 2012-2015 plan</td>
<td>• Analysis of Institutional Effectiveness Measures and performance on Priority initiatives of USP • Analysis of WMU USP management maturity and impact</td>
<td>June – August</td>
</tr>
<tr>
<td>III. Integration of Enterprise Risk Management (ERM) with Strategic Planning</td>
<td>• Identification of Risks limiting achievement of planned USP goals – (operational an impact) • Identification of new opportunities – for USP • HLC Quality Initiative Proposal planned and submitted for approval</td>
<td>March – August</td>
</tr>
<tr>
<td>IV. New ERM/Planning structures</td>
<td>• Creation of Senior Leadership Ownership structure for ERM/Planning • Creation of campus wide stakeholder committee for mitigation of ERM and revision of USP • Identification of goal specific institutional or newly created strategic structures to manage ERM and USP</td>
<td>March – ongoing</td>
</tr>
<tr>
<td>V. Campus input for revision and acceptance of WMU strategic plan 2020</td>
<td>• Roll out of proposed revisions from ERM/Planning structures • New plan proposed to Board of Trustees</td>
<td>October – November</td>
</tr>
</tbody>
</table>

WMU strategic plan 2020 begins implementation January 2016