

STRATEGIC PLANNING AT INDIANA UNIVERSITY BLOOMINGTON: A TWO-STAGE PROCESS

Assumptions

1. A list of campus academic program priorities must be developed by no later than March 15, 2003, preferably earlier, so as to guide decisions about initial investments of funds generated by the Commitment to Excellence tuition program.
2. A full-fledged strategic plan includes both academic program priorities and other elements, which while influencing and affected by such priorities are not identical with these priorities. Additional elements of a fully developed strategic plan typically would include the mission of the campus, the values of the campus, and non-academic priorities.
3. Commitment to Excellence funds are restricted to academic program initiatives (including undergraduate academic programs, as well as research, scholarship, and creative activities).

In light of these assumptions, a two-stage process will focus exclusively on academic priorities during the first year (2002-2003) and then, with these priorities as an anchor but not a full determinant, develop the broader scope of the plan in the second year (2003-2002).

Stage One of Strategic Planning (2002-2003)

1. The Academic Priorities Task Force will be established by the chancellor.
2. The membership of the Task Force will be selected by the chancellor from the nominations described below:
 - a. 4 deans, from nominations by the deans and by the BFC Nomination Committee
 - b. 2 deans with special expertise in undergraduate education: Deans of the Honors College and of University Division
 - c. 5 faculty, from nominations by the BFC Nomination Committee
 - d. 5 faculty, from nominations by the deans
 - e. 1 undergraduate student, from nominations by the IUSA
 - f. 1 graduate student, from nominations by the GSPO.
3. The chair of the task force will be appointed by the chancellor from the above membership.
4. The Task Force will be charged to develop by no later than March 15, 2003, and preferably earlier, a set of campus-wide priorities to recommend to the chancellor. If the chancellor has concerns about any of the recommended priorities, she will consult with the Task Force in an attempt to find mutual agreement. [Note: It is possible that one or more priorities would be relatively easily identified and have sufficient support on the Task Force and by the Chancellor that it would be possible to begin formulating proposals for these priorities even before the entire set is completed].

5. Following the chancellor's approval of the 2003 priorities, she will convene a meeting of all the deans who have faculty reporting to them and whose units receive tuition-based financial support from the Bloomington campus. The deans will be charged to work with each other and with their faculty to develop a set of proposals designed to address the priorities. Each proposal must include a description of the program; the faculty involved in the program; anticipated outcomes; a full budget, including funding from any other sources that would be applied to this program; and an evaluation plan to assess the impact of the program on the academic unit(s) involved, the campus, and the field of study.
6. These proposals will be submitted to a set of Review Committees, whose membership will be determined by the Academic Priorities Task Force in consultation with the chancellor. The Review Committees will make recommendations to the chancellor concerning which proposals should be funded and at what level of budgetary support.

Stage Two of Strategic Planning (2003-2004)

1. The Strategic Planning Committee will be established by the chancellor.
2. The membership of the SPC will be selected by the chancellor from the nominations described below:
 - a. 1 alumnus, from nominations by the IU Alumni Association.
 - b. 1 clerical staff member, from nominations by the CWA
 - c. 1 professional staff member, from nominations by the BPC
 - d. 1 community member, from nominations by the mayor.
 - e. 2 deans, from nominations by the deans and the BFC Nomination Committee.
 - f. 4 faculty, from nominations by the BFC Nomination Committee
 - g. 2 faculty, from nominations by the deans.
 - h. 1 undergraduate student, from nominations by the IUSA.
 - i. 1 graduate student, from nominations by the GPSO.
3. The chair of the committee will be appointed by the chancellor from the above membership.
4. The Strategic Plan developed by the SPC will be influenced by the academic priorities, reflecting the centrality of the academic mission to the life of the campus. However, the Strategic Plan will not be wholly determined by the academic priorities, thus recognizing the breadth and complexity of campus activities.
5. The SPC will be charged to develop by no later than February 15, 2004:
 - a. A mission statement for the campus
 - b. A values statement for the campus
 - c. Non-academic campus priorities (new programs or enhancements of existing campus-wide efforts, such as increasing diversity and strengthening "family-friendly" policies).
6. Furthermore, by February 15, 2004, the SPC will also have developed processes to obtain and review proposals of projects designed to address the

non-academic priorities. It will be the chancellor's responsibility to identify funding sources for these projects.

7. By no later than May 1, 2004, the SPC will recommend to the chancellor:
 - a. A set of benchmarks to track the progress made on both academic and nonacademic priorities.
 - b. A review process that examines the entire Strategic Plan, as developed across the two-year period, on an annual basis, with comprehensive reviews every 3 years. The first annual review would take place in Spring 2005.