



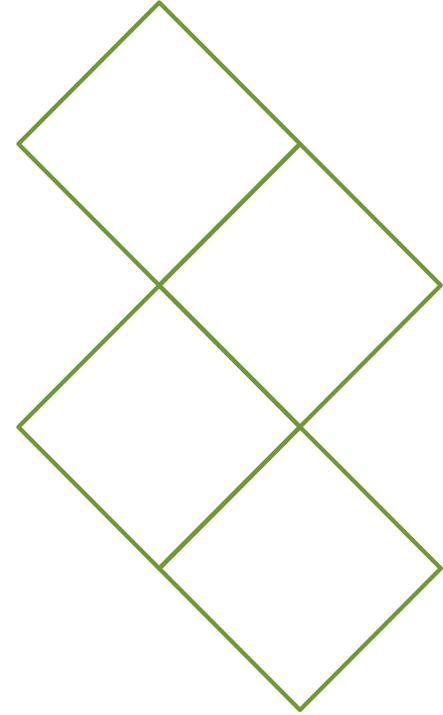
The Society for College
and University Planning

The Future is Integrated Digital Strategy and Data Governance: Challenges for Institutional Research and Analytics Professionals

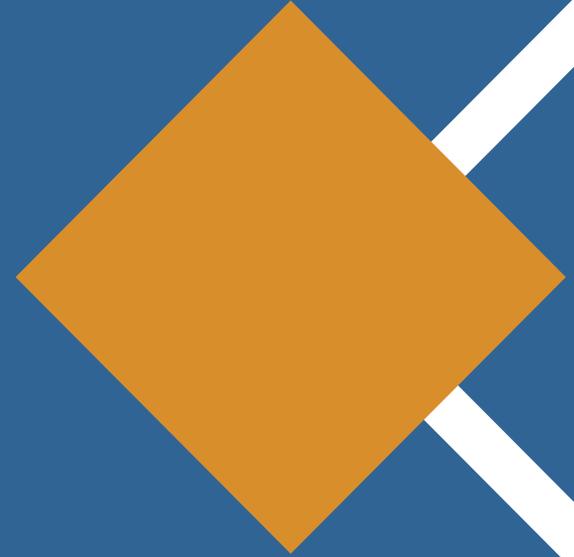
Dr. R. Joel Farrell, Texas Tech University Health Sciences Center
Sue Gerber, PhD, William Paterson University of New Jersey
Jyoti Senthil, College of Southern Nevada
DJ Pepito, Society for College and University Planning

Outline of Session

- I. **Crossroads of integrated digital strategy and data governance (iDSDG)**
- II. **SCUP and Integrated Planning**
- III. **Research Advisory Committee**
- IV. **The Hallmarks of Integrated Planning**
- V. **The purpose of an assessment tool**
- VI. **Overview of the tool**
- VII. **Research goals**
- VIII. **Research and Validation of tool**

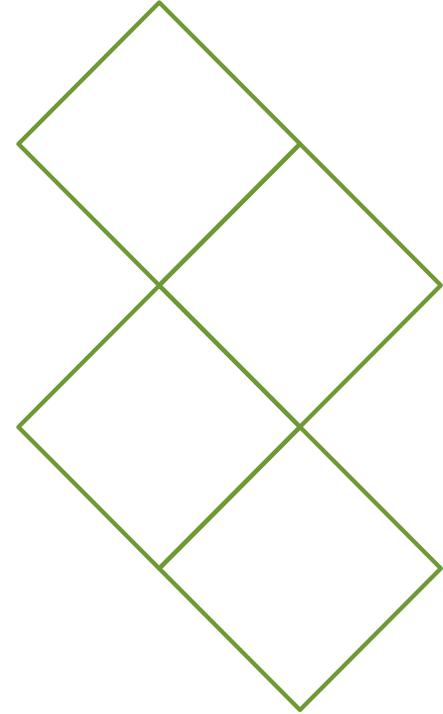


**integrated Digital
Strategy and Data
Governance (iDSDG)**

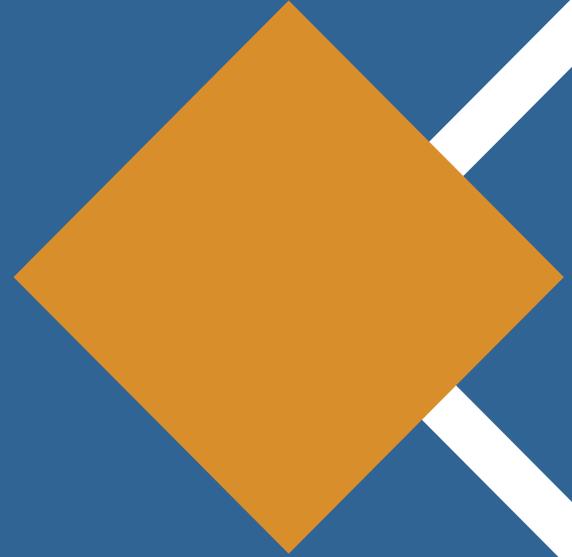


iDSDG

- **Vision:** A data-centric organization that democratizes the utilization of data for timely decision making, operational effectiveness, and increased efficiency across all levels.
- **Focus Areas:** Creating, updating and formalizing the strategy and effective framework for:
 - **Integrated Data Strategy**
 - **Digital World Strategy**
 - **Integrated Data Governance Strategy**
 - **Educational Technology Strategy**
 - **Informational Technology Strategy**
- **Integrations:**
 - **Systems, Sources, Platforms**
 - **Policies, Processes, and Practices**

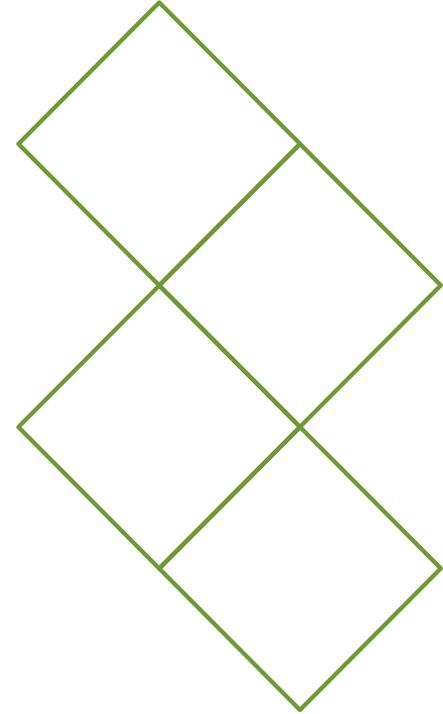


SCUP and Integrated Planning

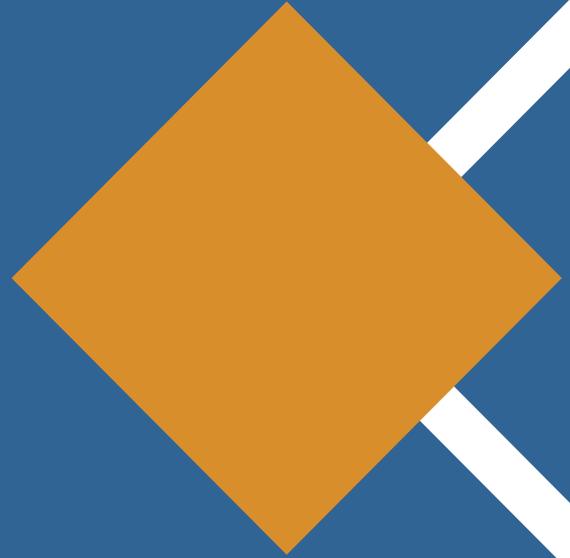


Integrated Planning: SCUP Current Definition

A sustainable approach to planning that builds relationships, aligns the organization, and emphasizes preparedness for change.

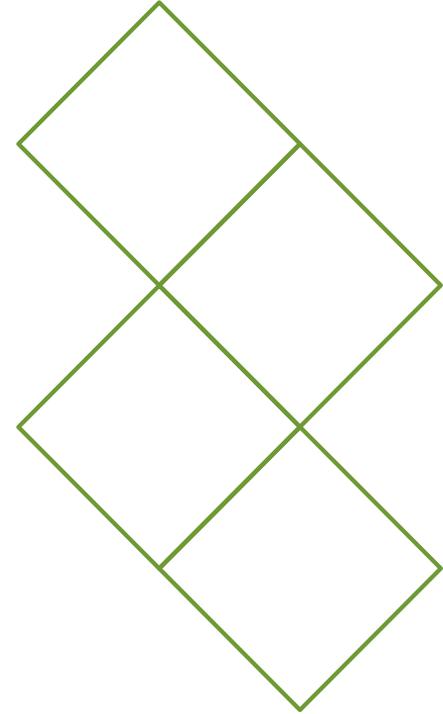


SCUP Brief History



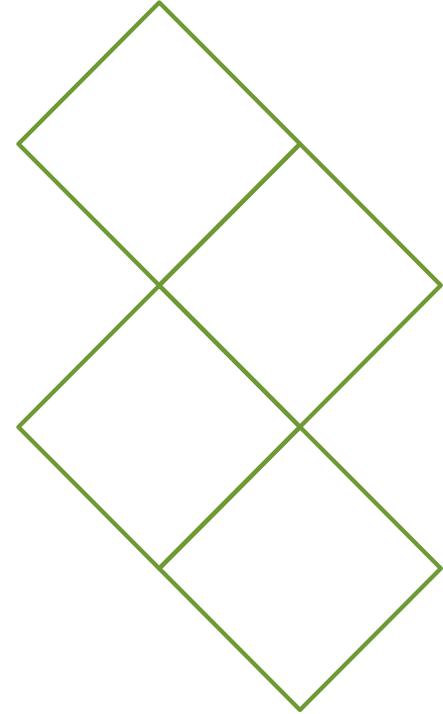
Integrated Planning: SCUP Beginnings

- **Founded in 1965**
- **Campus Planners sought to help their institutions make wiser long-term decisions**
- **Rapid rise in enrollment (thanks to the baby boom, NDA-Sputnik and GI Bill)**
- **Building boom without considering long-term benefit or impacts**
- **Realization campus planning cannot take place in a vacuum**
- **Interdependence of academic, financial and physical planning**
- **Around 1975 first concept of integration of academic, facilities, and fiscal planning**
- **Focused in Practitioner-owned evolving practice**
- **Aim—an institution where decisions are made strategically, in alignment with the mission, and with consideration of impacts across the campus**
- **Chaos, confusion and irregularity: “What* and “How* of integrated planning varied from planner to planner, campus to campus**
- **No single definition for integrated planning—multiple were used**
- **No clear path to integrated planning**
- **Early 2000s a common definition used at the time:**
 - **“Integrated planning links vision, priorities, people, and resources in support of the institutional mission and academic plan. It shapes and guides the entire organization as it evolves over time and within its community.”**
- **“Whole institution” integrated planning set a high bar that felt out of reach to many.**
- **External environment: Pace of change increased, Resources decreased, and Pressure rose.**

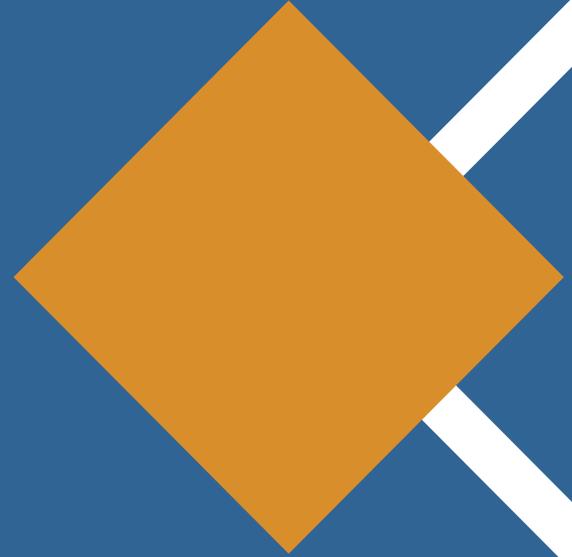


Integrated Planning: SCUP Evolution

- Practitioner-owned evolving practice
- Aim—an institution where decisions are made strategically, in alignment with the mission, and with consideration of impacts across the campus
- “What* and “How* of integrated planning varied from planner to planner, campus to campus
- SCUP provided a community of practice
- Confusion and irregularity
- SCUP’s “integrated planning 101” workshop—was not really standardized
- No single definition for integrated planning—multiple were used
- No clear path to integrated planning
- Early 2000s a common definition used at the time:
 - “Integrated planning links vision, priorities, people, and resources in support of the institutional mission and academic plan. It shapes and guides the entire organization as it evolves over time and within its community.”
- This “whole institution” integrated planning set a high bar that felt out of reach to many.
- External environment: Pace of change increased, Resources decreased, and Pressure rose.

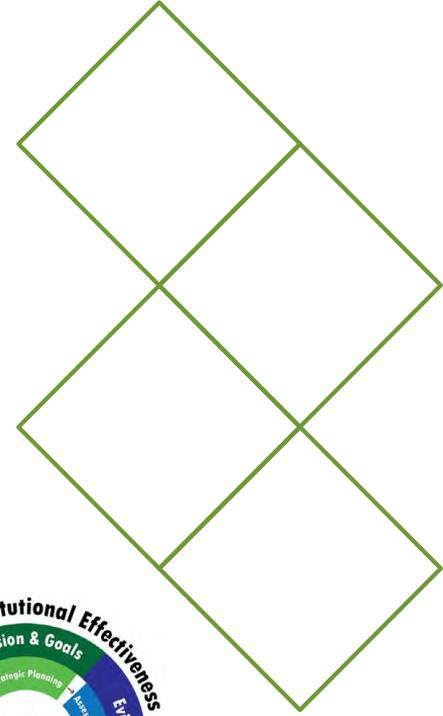


Integrated Institutional Effectiveness: Convergence

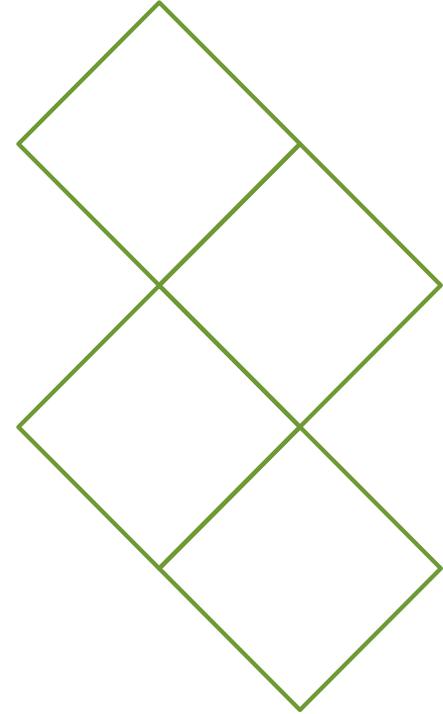


Integrated Institutional Effectiveness: Convergence

- Association for Higher Education Effectiveness (AHEE)
- Emerged around 2010 to provide a voice for Integrated Institutional Effectiveness (IIE)
- Developed a model and rubric for IIE
- IIE is the purposeful integration of functions that foster student success and support institutional performance, quality, and efficiency. Strategic planning, outcomes assessment, institutional research, regional/specialized accreditation, and program/unit review are coordinated to enhance the institutional mission.
- In 2023 AHEE merged with SCUP

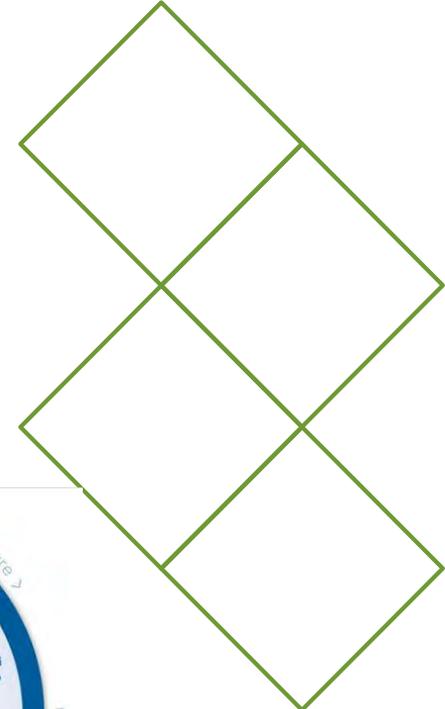
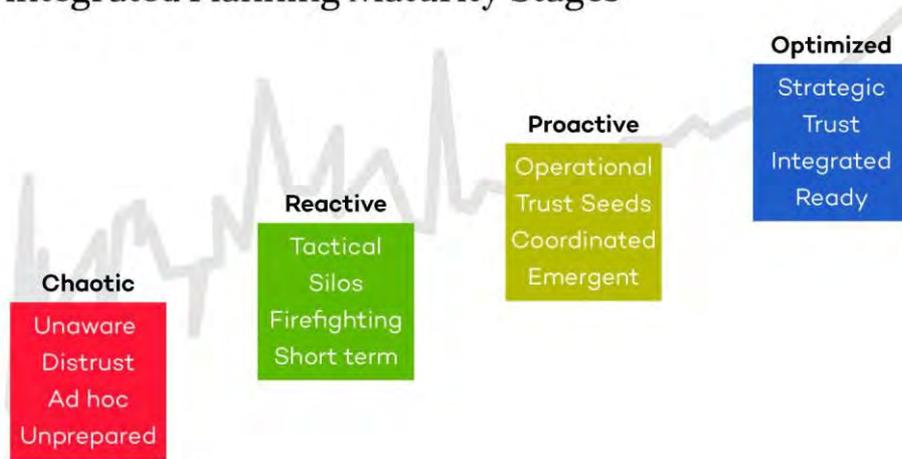


Integrated Institutional Effectiveness: Convergence



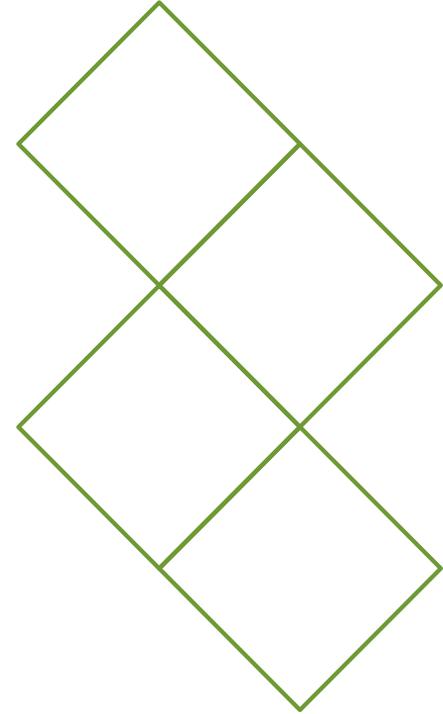
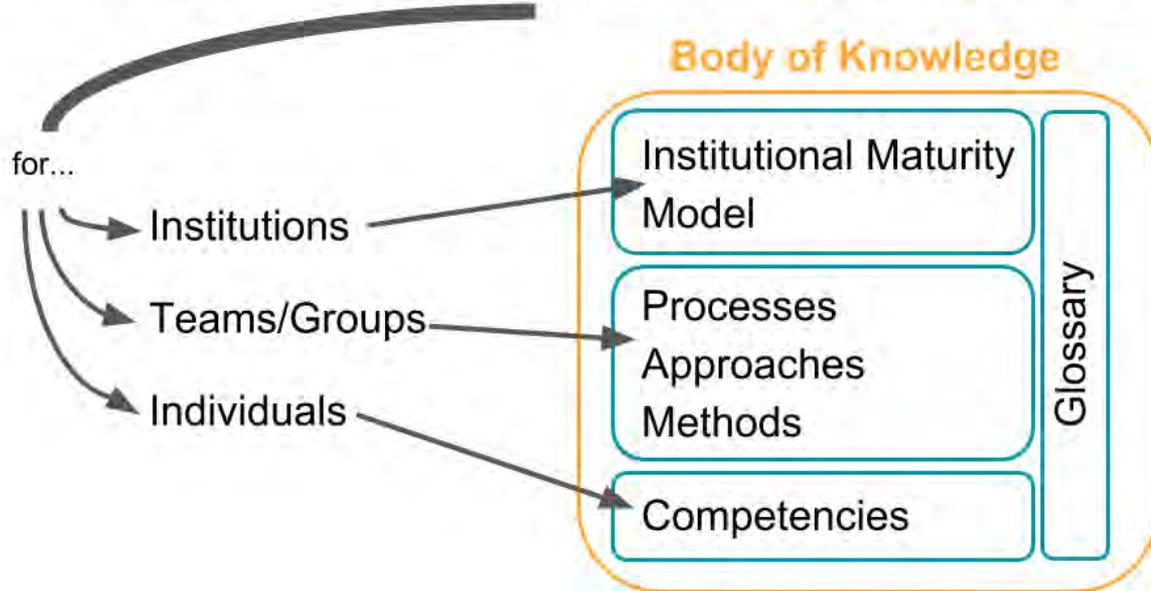
Integrated Planning: Maturing

Integrated Planning Maturity Stages

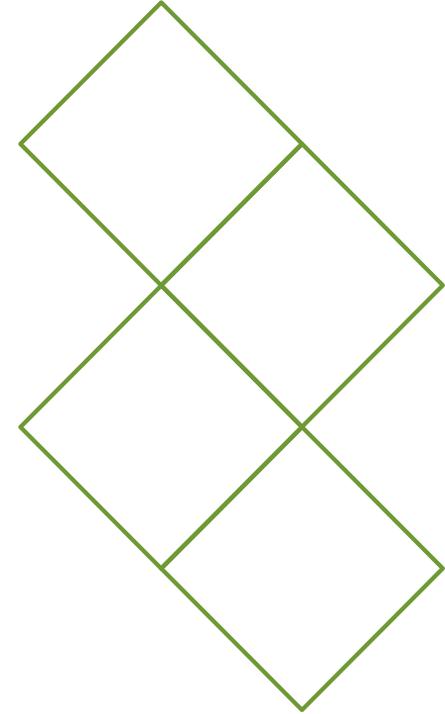


Need: Body of Knowledge.

What does it take to do planning in higher education?



Competencies: KSDs for integrated planning



www.scup.org/competencies



The Society for College
and University Planning

Reaffirming integrated planning as SCUP's mission, and committing to expanding the practice to more institutions.

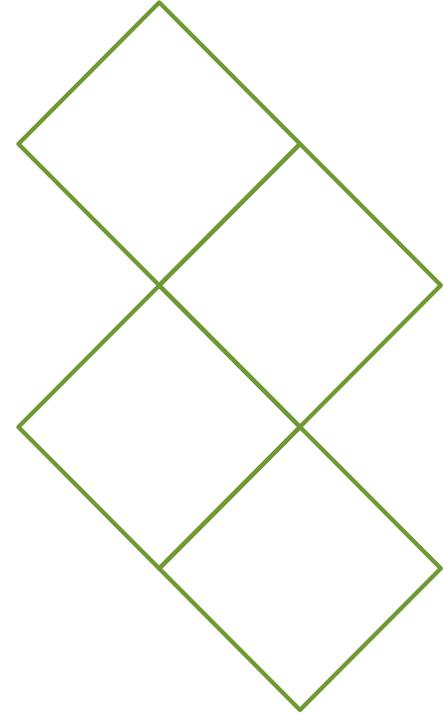
SCUP's Strategic Plan 2024-2029

As a community of practice, we offer learning, research, resource sharing, and best practices to advance institutional resilience through integrated planning.

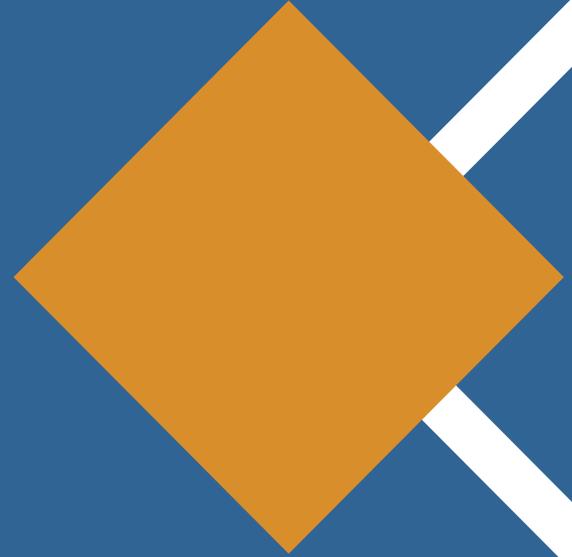
Strategic Plan Goals and Strategies

As thought leaders, SCUP will:

Drive the expansion and adoption of integrated planning in higher education.

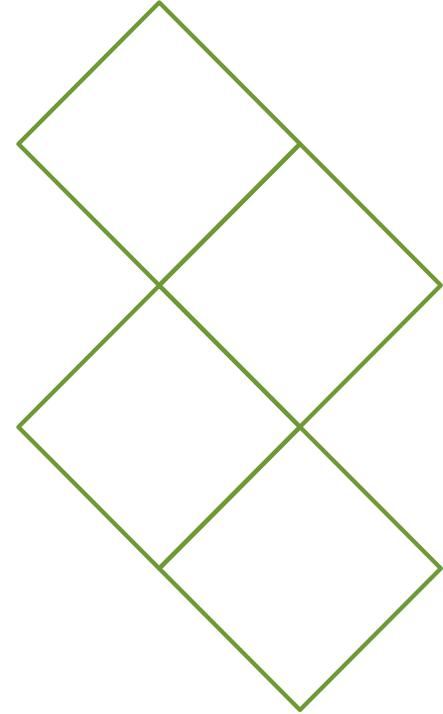


Research Advisory Committee

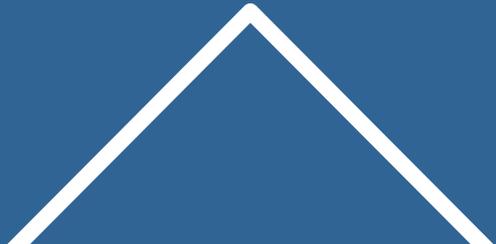
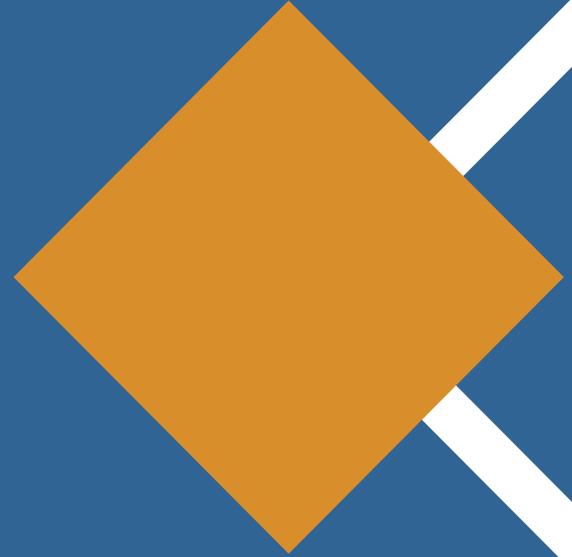


Integrated Planning and IIE Research

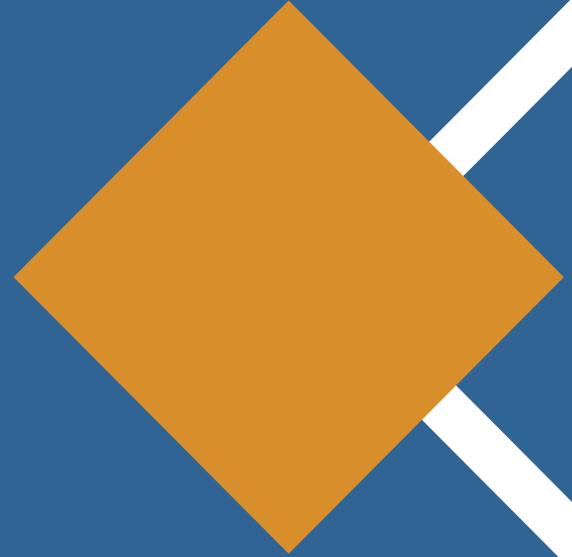
- Integrated Planning as a research-supported discipline
- Integrated Institutional Effectiveness as an influencer
- Research Goals
 - Are we doing integrated planning?
 - At what level?
 - Are we effective?
 - Are we aligned to the Hallmarks of Integrated Planning
 - Are there exemplars?
 - Are we closing the loop?



The Hallmarks of Integrated Planning

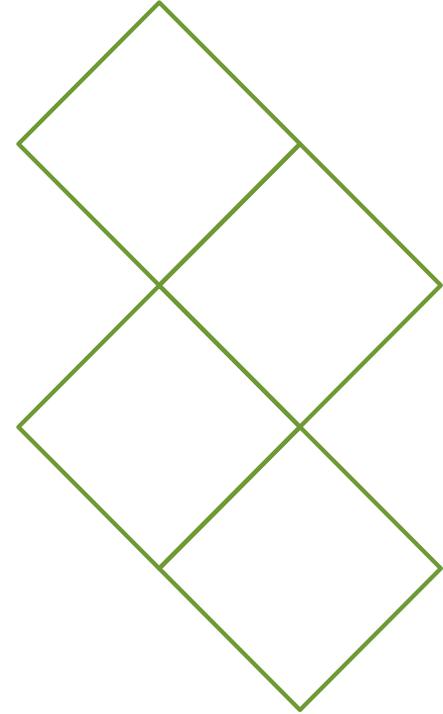


Developing an Assessment Tool

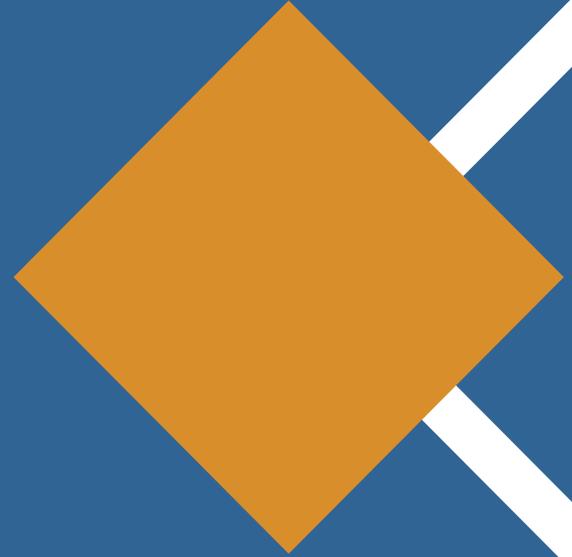


Integrated Planning Assessment Tool

- Designed to support culture change in higher education by helping teams and institutions “understand [their] current state” of integrated planning implementation and “identify pathways for growth.”
- Power is in fostering multidisciplinary/interdisciplinary collaboration and understanding, reducing silos, and aligning strategy and operations to advance institutional effectiveness.

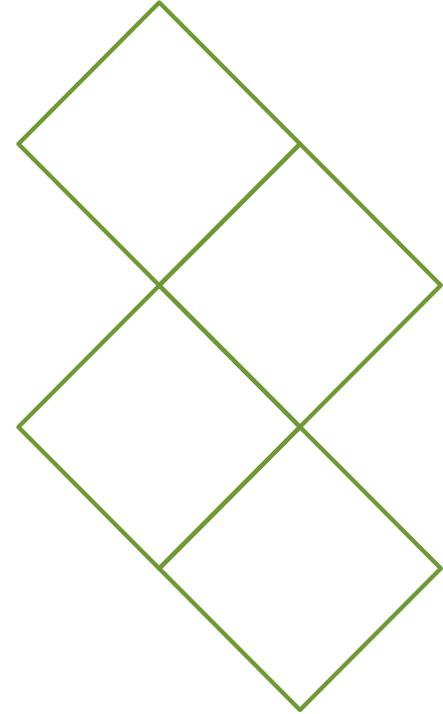


Overview of the Assessment Tool



Integrated Planning Assessment Tool

- **Reflection on each Hallmark on a five point scale**
- **Emerging—Basic planning elements have been initiated**
- **Developing—Planning processes are being established and implemented**
- **Refining—Processes are established with continuous improvements**
- **Advancing—Processes are well-coordinated and systematic**
- **Uncertain—Not enough information to confirm evidence**



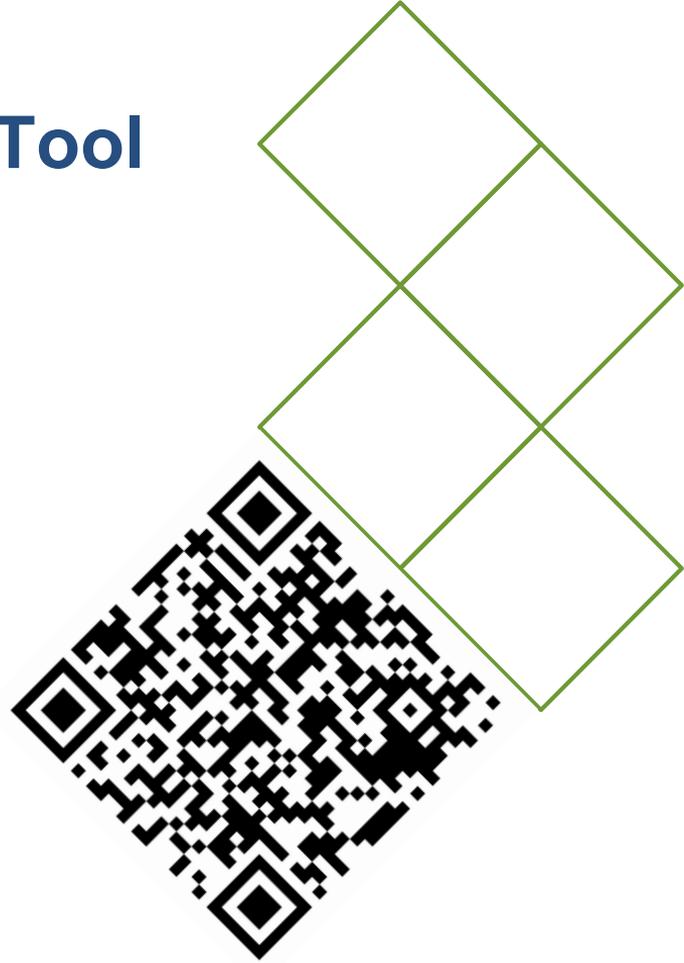
Research, Development and Piloting

scup.org/integrated-planning-assessment

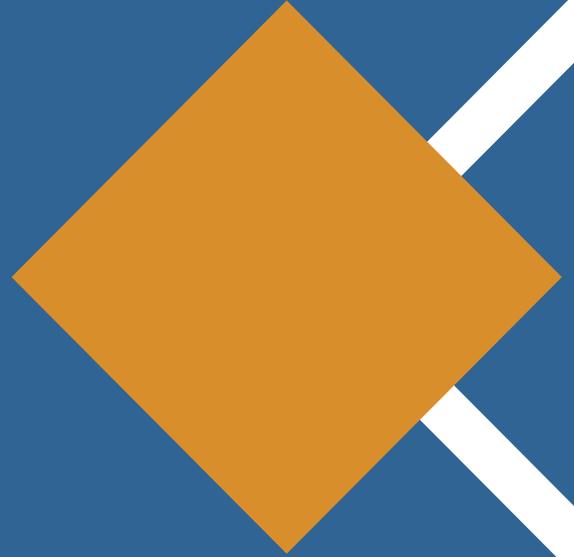


Integrated Planning Assessment Tool

- Ongoing research—You can contribute
- Complete the assessment
- Provide feedback
- If willing be interviewed
- <https://www.scup.org/integrated-planning-assessment/>



Thank you!



Scan the QR code
to complete the
session survey.

