Name:

Institution:

Plan, Act, Evaluate

Review the following summary to get a better understanding of the recommended steps when planning for a strategic initiative on campus. On the next page you will be able to map out your own plans for evaluating the impact of your efforts.

Summary of Key Definitions in Planning and Evaluating Strategic Initiatives

1

Define Primary and Secondary Objectives

- What is the primary goal you are hoping to achieve with this initiative?
- What are the significant milestones in attaining this goal?
- Which strategies are you going to employ to reach each of these milestones?
- Which additional goals, if any, are you pursuing along with the primary goal?

2

Define Metrics for Success

- How do you intend to measure your primary goal?
- Which supporting metrics will contribute to your evaluation of success?
- Do any of these metrics also contribute to your secondary objectives?

3

Define Key stakeholders and Participants

- Who are the primary stakeholders responsible for outlining the goal(s) of this initiative as well as the available institutional resources?
- Who are the primary participants in this initiative and what is their expected contribution?
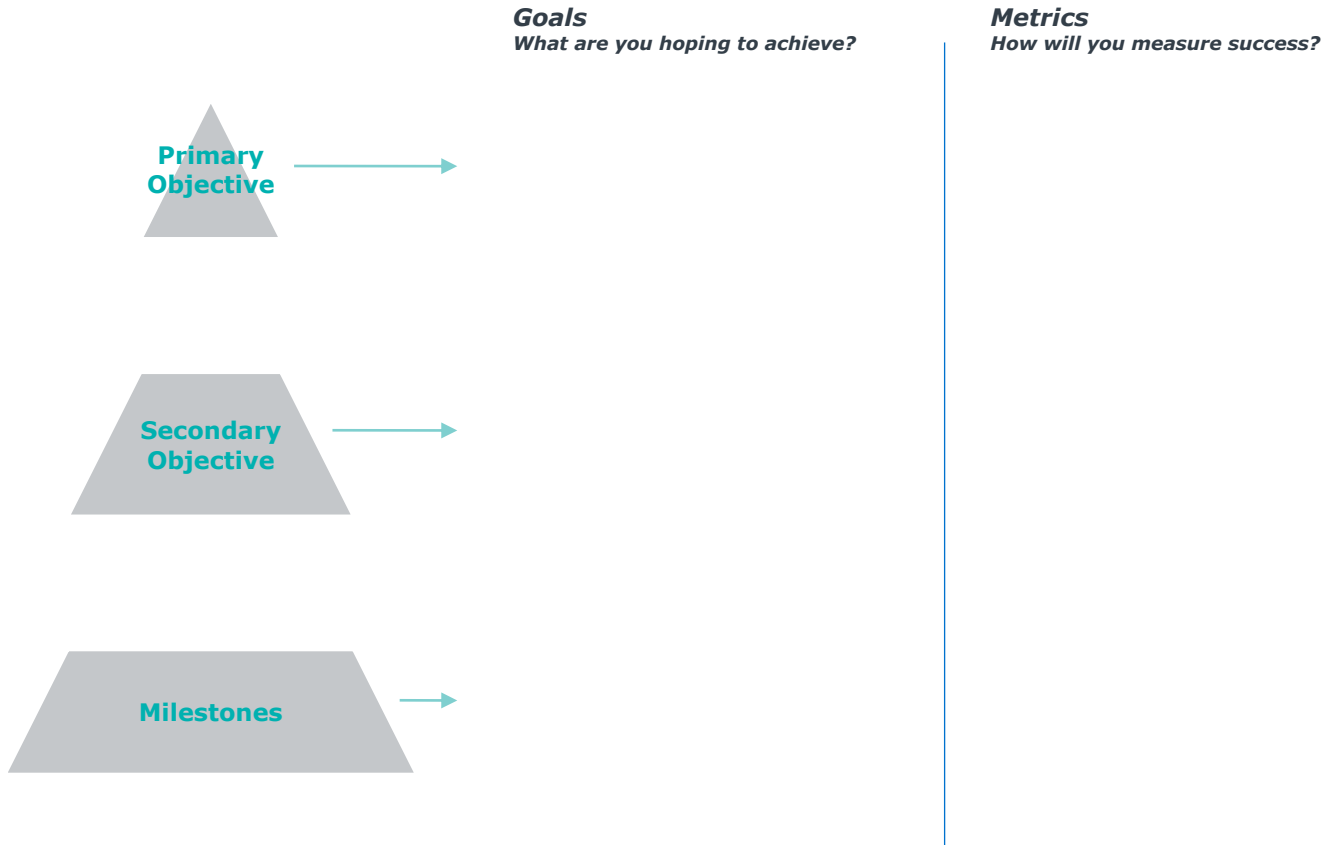
4

Evaluate & Iterate

- Once your initiative is finished, return to this worksheet and complete pages 3 and 4. These will help you focus on quantifying and evaluating the outcomes of the initiative and planning for ways to enhance your results for future iterations.

Strategic Initiative Evaluation Plan

> **Strategic Initiative (i.e., updating faculty line request process, revising course scheduling, etc.)**

Objectives and Metrics

Goals
What are you hoping to achieve?

Metrics
How will you measure success?

Primary Objective →

Secondary Objective →

Milestones →

Stakeholders and Participants

Who are the Stakeholders(s) responsible for setting a timeline and providing oversight and direction for this initiative?	*Who will be participating in this initiative and what are their responsibilities?*

Evaluation and Iteration

Will Your Initiative Serve at Scale?

Quantify and Rank Outcomes

Fill in the boxes below to begin quantifying and ranking the outcomes of this initiative.

1. List the objectives of your initiative.

- ○
- ○
- ○
- ○
- ○

- ○
- ○
- ○
- ○
- ○

2. Repeat participant survey and attempt to measure subjective goals.

- ○
- ○
- ○
- ○
- ○

- ○
- ○
- ○
- ○
- ○

3. Compare objective data to your data snapshot to evaluate improvements. What changes did you achieve?

- ○
- ○
- ○
- ○
- ○

- ○
- ○
- ○
- ○
- ○

4. After completing questions 2 and 3, rank these outcomes in terms of their significance on your campus (1 being most and 10 being least significant).

1.
2.
3.
4.
5.

6.
7.
8.
9.
10.

Can This Initiative Be Employed at Scale?

Identify Opportunities for Improvement in Future Iterations

Reflect on Potential Enhancements and Scale

Take an opportunity to reflect on all of the hard work you did over the last academic year, both within the leadership team as well as the end users involved in the initiative.

Once your initiative has concluded, reflect on the questions below, using the space provided.

- Which parts of the initiative do you think went well? Not so well?
- Did your initiative accomplish its goals? Why or why not?
- Was this a one-time event or do you intend to repeat this process in the future? If you are repeating this event, consider ways to boost or at minimum maintain its success.
  - › Reflect on the input required for this initiative. How can you reuse existing infrastructure to reduce overall input for the second iteration.
  - › Reflect on the outcomes from the previous page. How can you duplicate these outcomes for other units on campus? How might you be able to improve these outcomes for the second iteration?