

## 2014-15/2018-19 Unit Strategic Plan Review

**Unit:** Lehigh Valley

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Provost's Guidelines, June 2013	Provost Nick Jones "pillar"	President Eric Barron "major topic"
<b>1. Executive Summary/Highlights</b>		
<p>This is a very detailed plan that indicates the Lehigh Valley has taken the planning process seriously. Much of the plan can be read as a development of the suggestions of the Core Council. LV is focusing on developing programs and opportunities maximally relevant to the types of students the campus is able to target with recruitment. This means the creation of new programs sensitive to growing job needs and classes and programs being delivered using technology.</p> <p>Many, but not all of the actions in the plan include timelines and designate leadership, making the plan fairly actionable. Some of the actions would benefit from the inclusion of baseline data. Additionally, the plan mentions growing research efforts, but there is little detail on this point.</p> <p>The plan is quite large at 176 pages, and includes reports from several different planning groups as well as detailed studies, such as a thorough student demographic study. It can be difficult for the reader to understand LV's priorities in spots. An executive summary would be a useful addition to this plan.</p> <p>The campus' "institutional planning" website makes clear that Lehigh Valley is organized in its approach, and committed to, strategic planning. The creation and use of such a website is commended and viewed as a best practice example.</p>		
<b>2. An articulated vision of the unit's future over the next five to ten years.</b>		<b>Excellence</b>
<p>"Penn State Lehigh Valley will be a leader within our global university by improving lives through academic excellence and community engagement (p. 5)." An expanded vision is described on page 37 with an additional emphasis on helping students develop in ways that makes them valuable to the local workforce (where LV expects demand will grow in the coming years) and encouraging them to stay in the area after graduation. The lead up text to the vision indicates that LV has an excellent understanding of local area demographics.</p> <p>The plan presents a specific statement about maintaining excellence in teaching, research, and service on page 23. It reads, "Overall, Penn State Lehigh must continue to pride itself on teaching and research excellence, viability and sustainability, and local and global citizenship offered through a student-centered, supportive campus environment."</p>		
<b>3. A discussion of specific strategies to achieve the vision.</b>		

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<p>The specific strategies are described on page 38. They include increasing program offerings (including online) relevant to local workforce needs and global needs, improving communication to the public about said offerings, increasing co-curricular offerings, providing students with more leadership opportunities, creating a more diverse and inclusive environment, and cultivating a culture of continuous quality improvement among employees.</p> <p>The plan presents these strategies clearly, though some of them make better use of data to assess the current situation than others. It is obvious that these strategies are important and that they flow logically from LV's mission and vision. It might be useful if more sense of priority were evident.</p>		
<b>4. For academic units: A discussion of plans, progress, and initiatives in learning outcomes assessment.</b>	<b>Transforming Education</b>	<b>Student Engagement; Student Career Success &amp; Economic Development</b>
<p>As described on page 87, LV has developed learning outcomes for each of its six bachelor degree programs. (Two more programs will most likely be added in the near future, so learning outcomes will be developed for them as well). LV has an annual review process for the learning outcomes to make sure defined outcomes continue to be relevant. The plan states that the specific learning outcomes for each program can be found on Lehigh Valley's website, but there was no link and they could not be found by searching. However, both Table 2.6 and the continuum which begins on p. 85 are useful additions to the strategic plan and highlight LV's strengths regarding assessment.</p> <p>The plan describes co-curricular learning outcomes, such as those related to service and leadership across the University. They might benefit by being made more specific however.</p> <p>A big part of the student engagement effort of LV is to offer courses in ways modern students appreciate – hybrid and online, in addition to traditional offerings.</p>		
<b>5. Strategic performance indicators structured around unit level goals.</b>		
<p>Starting on page 44, the plan describes each goal, current practices relevant to each goal, and strategies to further achieve success with each goal. The strategic indicators are not specifically identified, though some can be found in the textual descriptions of the strategies and in other parts of the plan. It might be useful to collect and highlight them specifically in this section.</p>		
<b>6. Diversity planning</b>	<b>Valuing and Exploring Our Cultures</b>	<b>Diversity and Demographics; Accessibility</b>
<p>The diversity plan starts on page 96. It details principles centered on providing access to diverse students, educating them on diversity, creating a welcoming campus climate, and more. This section also details the results of various diversity assessments, such as inventories and focus groups, used to help develop and assess said principles (though it is less clear exactly how the data was used). A number of diversity related statistics are presented, and there are references to the previous diversity plan in the presentation.</p> <p>The plan notes specific diversity gaps, such as the fact that facility improvements need to be made for disabled students. It also discusses how the</p>		

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student body reflects the demographics of the local area. Several actions to improve accessibility are indicated including updating the LV website to be more accessible. As another example, employees will receive more training on how to better serve students with additional accessibility needs.

**7. Core Council follow-up.**

The plan presents a detailed discussion of Core Council initiatives on pages 147 through 155, with relevant appendices following. All of the recommendations have been addressed to one degree or another. Some actions are still ongoing.

**8. Information on practices that promote integrity and ethical behavior.**

An ethics and integrity plan is described on pages 91 through 94. There are policies linked to for different units as well as overall ethics and integrity statements, goals, strategies, and actions. These are centered on making integrity policies clear to all faculty members, staff, and students and helping said groups adhere to the standards presented in them.

Overall, the plan is highly detailed. It might be helpful to include metrics and links to the Office of Ethics and Compliance, Research Protections, Internal Audit, and Affirmative Action in the resources section.

**9. Discussion of how the unit is contributing toward Penn State's goals for sustainability.**

**Stewarding Our Resources**

LV's sustainability plan (starting on p. 123) describes goals to create an environment steeped in an understanding of sustainability, develop initiatives that promote sustainability practices and policies, and connect teaching and research to wide-ranging, society-based initiatives. The plan presents a report of the results from a sustainability survey, describes sustainability projects (current and planned and some by students), and integrates sustainability initiatives into the previously described initiatives and action items. Some of these projects include integrating sustainability research into the curriculum, leveraging the work of Green Teams, and creating partnerships with local organizations dedicated to sustainability efforts.

No specific metrics or strategic indicators are given for these goals, so this section may benefit from their inclusion. Additionally, no sense of priority is indicated.

**10. Correlation of strategic initiatives to budget planning and adjustments.**

While there is a discussion of campus budget and future changes and needs on page 136, there does not appear to be a significant discussion of how budget planning aligns with specific initiatives, apart from noting that new programs will bring in new students which will necessitate new spaces and possibly faculty and staff. This seems to be related to uncertainty about the new budget model, so the discussion is probably at the right level. There is some discussion about evaluating the necessity of some positions and promoting joint appointments.

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<b>Promoting Our Health</b>		
LV plans to start two new health focused programs: Health Policy Administration and Bio-behavioral Health. There are plans to improve health services for students with a focus on the wellness model.		
<b>Building Our Digital Future</b>		<b>Technology</b>
Evidence of building LV's digital future can be found throughout this document. Online educational opportunities are part of this plan, recognizing that twenty-first century students need high quality, interactive and engaging courses offered in flexibility delivery modes. (p. 29)		
<b>Additional Observations</b>		
The plan presents a very thorough needs analysis and well as a thorough follow-up to the 2008-13 strategic plan. Notably, the plan includes several unit specific strategic plan summaries (pp. 27-32). As noted, it is clear that Lehigh Valley is committed to and serious about planning, and that LV has invested energy and time into a serious, well-organized approach to planning with a long-term view.		