**C.A.R.E.**

**COLLABORATE • ASPIRE • REFLECT • ENGAGE**

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**Strategic Planning Process Guidebook**

**2022**

Logo

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Contents

[2 President’s Invitation 2](#_Toc113972678)

[3 This Guidebook 3](#_Toc113972679)

[4 The C.A.R.E. Process 3](#_Toc113972680)

[5 Our Strategic Plan 5](#_Toc113972681)

[6 Our Mission and Core Values 7](#_Toc113972682)

[7 Charge to the Committee 8](#_Toc113972683)

[8 Timeline 10](#_Toc113972684)

[9 Collecting Community Feedback 11](#_Toc113972685)

[10 The Steering Committee 14](#_Toc113972686)

[11 Roles and Responsibilities 15](#_Toc113972687)

[12 Appendix: Terms and Definitions 16](#_Toc113972688)

# President’s Invitation

Every day, as I interact with colleagues and speak with our talented students, I am reminded how much we believe in Loyola’s bright future. Our Jesuit, liberal arts University is thriving because of you. I am so grateful that we are writing this chapter of Loyola’s history together.

What an exciting time. And the best is yet to come. As we undertake our strategic planning process, we will be looking toward the future in a new way, reflecting on our strengths and challenges as a university, considering our role in the world, and dreaming big about what Loyola University Maryland could—and should—be in the years ahead. Your ideas, your input, and your participation are important to this planning process. While not every idea will be included directly in the strategic plan, every idea generated and shared during this process will help us shape, imagine, and strategically define the ways we can evolve Loyola University Maryland for the future.

The most effective strategic plans are created by the people who will bring them to life and move the institution forward. The next strategic plan for Loyola University Maryland will be created by you, and I believe it will stretch and strengthen our University in extraordinary ways. Today, I invite you—even encourage you—to engage with the process as much as you can.

Together, we will create this next chapter for our Loyola community for the greater glory of God—AMDG.

Sincerely,

A pair of glasses

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Terrence M. Sawyer, J.D.

President

# This Guidebook

We, the Strategic Planning Steering Committee, hope this Guidebook will provide clarity about our goals for the strategic planning process, how the process will unfold, and what the final result will be.

We hope this guidebook will provide clarity about our goals for the strategic planning process, how the process will unfold, and what the final result will be.

This Guidebook includes information about the Strategic Planning Steering Committee, as well as others involved in supporting this process. It is intended to serve as a reference for the community and will be updated as needed.

The Guidebook was created by the co-chairs of the Strategic Planning Steering Committee and committee staff. The entire committee and the Cabinet reviewed the Guide and provided helpful feedback and edits. Questions about this Guidebook and the strategic planning process should be submitted to: [strategicplanning@loyola.edu](mailto:strategicplanning@loyola.edu).

We offer it you – the Loyola community – as a way to build trust in the process and encourage your wholehearted participation.

# The C.A.R.E. Process

As we start our new strategic planning process, we look to our future with hope. With the rest of the country, our community has faced the challenges of the COVID-19 pandemic. Our commitment to *strong truths well lived* has enabled us to do hard things.

This strategic planning process builds on our resilience and strengths. It invites our community to C.A.R.E.

The time we spent apart during the pandemic, has affirmed the importance of our community, and proven that we are better together. This strategic planning process builds on our resilience and strengths. It invites our community to C.A.R.E.

Congruent with our Jesuit, Catholic values, the strategic planning process will honor our obligations to care:

|  |  |
| --- | --- |
| User with solid fill | For the whole person (*cura personalis*), and |
| Schoolhouse with solid fill | For the institution (*cura apostolica*). |

**C.A.R.E.: Collaborate and Aspire to Reflect and Engage**

C.A.R.E. reflects our promise to the Loyola community to listen deeply, to reflect carefully, to promote trust, and to act with integrity. To this end, we invite everyone to commit to:

|  |  |
| --- | --- |
| C  A  R  E | **Collaborate** in a way that is authentic, inclusive, and forces us to step outside our comfort zones, break through silos, listen earnestly, learn from each other, and work together with hope as we promote the common good. |
| A | **Aspire** boldly to face the future with excitement, cultivate the freedom to imagine, and declare confidently the possibilities we envision for Loyola, while being true to the core of who we are and relinquishing what holds us back. |
| R  A  R  E | **Reflect** individually and with each other by continuously examining ourselves and the process with humility, prioritizing an open and honest dialogue, exercising discernment, and always seeking to improve. |
| EEe  A  R  E | **Engage** others in a spirit of welcome and friendship that encourages participation in the process by acknowledging and validating all viewpoints and offering multiple opportunities for meaningful, equitable engagement. |

Beyond the creation of the final strategic plan that charts the future of Loyola, we hope that our community emerges stronger and more united as a result of this planning process.

Based upon listening to various constituencies in Spring 2022, President Sawyer has asked the community to think about the following questions as we collaborate, aspire, reflect, and engage:

1. How can we improve our commitment to DEI, student success, and wellbeing?
2. How can our Jesuit values, specifically engaged learning and academic excellence, be realized in a way that sets us apart from the other 28 schools in the Association of Jesuit Colleges and Universities (AJCU)?
3. How can the Universal Apostolic Preferences,[[1]](#footnote-2) and specifically caring for our common home, be more fully embraced?
4. How can employment issues specific to higher education be innovatively addressed, making Loyola a place where people feel valued and love to work?

# Our Strategic Plan

We want to be clear about what our plan is intended to do, who our plan is for, and how this plan will be used at Loyola. Before addressing these questions, we want to briefly outline the basic elements of our strategic plan.

**Elements**

Our final strategic plan will articulate a vision for Loyola’s future, provide direction and set priorities looking forward to 2030. A strategic plan differs from an operational or tactical plan in that it focuses on prioritizing direction and strategies. Because a strategic plan requires focus, it creates an opportunity for us to engage in a dialogue about priorities. Not everyone will agree on what these priorities should be. Initial stages of the planning process help surface productive debates and dialogue that further refine our institution’s strategic vision. From the wealth of proposed ideas, suggestions, and priorities, choices must then be made with the goal of clearly defining and differentiating ourselves from other colleges and universities, especially within the AJCU.

Our strategic planning process will require us to make specific choices that differentiate us from other colleges and universities.

Loyola’s next strategic plan must be flexible enough to meet unexpected circumstances (i.e., COVID-19), while also keeping everyone focused on the same vision and desired end-results. It should define success, helping everyone to assess how and if we are achieving our vision. The plan, finally, must position us to implement our mission more effectively, while maximizing our opportunities for growth. When Loyola’s strategic plan is finished it will contain the following elements and address the following questions:

|  |  |  |
| --- | --- | --- |
| FOUNDATION | CONTEXT | STRATEGIC GOALS |
| Vision  Mission  Core Values | Who is this plan for?  What is this plan focused on?  What circumstances and situations influenced our focus? | What are we trying to achieve?  How will we define success?  What initiatives will we pursue to help us achieve success?  Who will be responsible for oversight?  What milestones will we establish to assess our efforts?  What resources will we use to help us achieve our strategic goals? |

**Our Audience**

Our strategic plan will be focused on students, faculty, staff, and administrators. Our mission is to inspire students to learn, lead, and serve in a diverse and changing world. Therefore, we want to ensure this plan does just that – motivates students to achieve their potentials and contribute to the common good. Faculty, administrators, and staff come to work every day with a commitment to the institution and its mission and values. We want this plan to better support and equip them to live out our mission and values and to be excited about a vision that moves our University forward.

Our strategic plan will be focused on students, faculty, staff, and administrators.

While we acknowledge that we also serve other constituencies – parents, alumni, donors, our Board of Trustees, and our Baltimore neighbors – fundamentally we are choosing to focus this plan on serving those closest to our mission.

**Our Intended Outcomes**

The plan is intended to unite our community around a shared vision for our future and priorities that will guide how we use our resources to achieve that vision. We have a wealth of resources available to us and many opportunities that we could pursue. This plan will guide us to know where to say “yes” and where to say “no” or “this will wait until later.”

One thing we have heard from the Loyola community is that people feel stretched. We hope this plan will help us all re-evaluate our work – from the University strategic level to the day-to-day operational level. A successful strategic planning process should define our focus and prioritize our efforts so that we can realize our vision utilizing the resources we have. We hope this plan moves us away from a scarcity mindset where people feel they must do more with less. Instead, by prioritizing and focusing on a few key strategic goals, we hope everyone will better be able to define their work within the resources available and feel excited as we accomplish great things together.

The plan is intended to unite our community around a shared vision for our future and priorities that will guide how we use our resources to achieve that vision.

**How We Will Use This Plan**

The President and Cabinet are committed to integrating this plan into our daily life. The plan should become the map that helps each division, unit, office, and community member know how to prioritize their time and efforts. This will feed into our work toward institutional effectiveness and should become the touchstone that everyone references when we decide what future projects to pursue.

Our plan will have clear definitions of success and we will assess our progress in reference to those definitions as we work toward our ultimate goals. We will integrate assessment into our process of reflection so we can more agilely innovate in response to unanticipated circumstances in order to achieve our overarching goals.

# Our Mission and Core Values

As we engage in this planning process, our [mission](https://www.loyola.edu/about/mission) and [core values](https://www.loyola.edu/about/mission/core-values) will guide the decisions we make and the areas where we decide to focus our time and financial resources.

**Loyola’s Mission**

*Loyola University Maryland is a Jesuit, Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideals of liberal education and the development of the whole person. Accordingly, the University will inspire students to learn, lead, and serve in a diverse and changing world.*

****The University’s [*Mission Priority Examen*](https://www.loyola.edu/department/president/priorities/mission-priority-examen), a comprehensive self-assessment of the University’s Jesuit, Catholic heritage and educational mission, centers on three priorities, which we have committed to strengthening over the next five years:

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| --- | --- | --- |
| **Ignatian Formation** | **Equity and Inclusion** | **Badge 3 with solid fillEnvironmental Sustainability** |

**Loyola’s Core Values**

Our core values as a university are rooted in the Jesuit, Catholic tradition. From the time of their founding nearly 500 years ago, the Jesuits have had a distinctive way of looking at life. The Ignatian worldview emphasizes:

* openness and enthusiasm toward the whole of God’s richly diverse creation and for the human person as its crowning glory;
* hopefulness and pragmatism in seeking graced solutions to life’s challenges, tempered by realism and compassion about the reality of human weakness;
* sustained critical attention to motivations and choices based on the conviction that individuals, through the exercise of their freedom, exert a real influence on their world and one another; and
* commitment to a life of growing integrity and increasing service to God and to others.

As a Jesuit, Catholic university with a 170-year history, Loyola University Maryland adopts and [adapts](https://www.loyola.edu/about/mission/core-values#academic-excellence) these characteristic emphases of the Ignatian heritage and reflects them in its life and work by encouraging all its constituents to cultivate and to live by certain core values. These [values](https://www.loyola.edu/about/mission/core-values) are:

|  |  |
| --- | --- |
| * [Academic Excellence](https://www.loyola.edu/about/mission/core-values#academic-excellence) * [Focus on the Whole Person](https://www.loyola.edu/about/mission/core-values#whole-person) * [Integrity and Honesty](https://www.loyola.edu/about/mission/core-values#integrity-honesty) * [Diversity](https://www.loyola.edu/about/mission/core-values#diversity) * [Community](https://www.loyola.edu/about/mission/core-values#community) | * [Justice](https://www.loyola.edu/about/mission/core-values#justice) * [Service](https://www.loyola.edu/about/mission/core-values#service) * [Leadership](https://www.loyola.edu/about/mission/core-values#leadership) * [Discernment](https://www.loyola.edu/about/mission/core-values#discernment) * [Constant Challenge to Improve](https://www.loyola.edu/about/mission/core-values#improve) |

**Diversity, Equity, and Inclusion Strategic Plan, 2020-2023**

Adopted in October 2020, the Loyola community committed to taking specific steps to grow in better living out our commitment to diversity, equity, and inclusion. The goals outlined in the plan are listed below. Individuals are encouraged to read the entire plan and updates on implementation to date on the [website](https://www.loyola.edu/department/equity-inclusion/institutional-commitment/strategic-plan).

**Education, Professional Development, and Assessment**: Develop an education, professional development, and assessment framework through which systemic change may occur and lead toward equitable and inclusive excellence across the University.

**Inclusion and Accessibility**: Ensure more inclusive and accessible physical, virtual, sociocultural, and developmental spaces exist so members of our community can work, learn, live, and thrive.

**Ignatian Citizenship**: Use mind, body, and spirit to listen for a higher calling; look for a deeper purpose; and lean into a journey that results in transformational change and the articulation of voice that embraces building bridges, seeing local and global issues as interconnected, and taking on the responsibility to apply Jesuit values to make a difference in the world.

The DEI plan as outlined runs through 2023. Our strategic plan will launch in spring 2024. As we develop our strategic goals and initiatives, we will ensure that we continue the work started in the DEI strategic plan and build upon it to make it a more integral part of our life at Loyola.

# Charge to the Committee

The Strategic Planning Steering Committee (SPSC) is charged with creating a planning process that improves Loyola and positions it for long-term success. In asking the community to help lay out the vision for Loyola’s future, the committee will assist the community with the following:

* Create a strategic plan that directs where Loyola will focus its time, energy, and resources, and also defines our measures for success
* Recommit to our mission as the driving factor behind all we do
* Understand how our strategic plan better positions us to live our mission
* Engage in a conversation about prioritization
* Build community and a shared vision for our future
* Encourage an asset-based approach to planning that recognizes the incredible talent and resources available within our community
* Develop strategic thinking that sets Loyola apart from other universities

The strategic plan should consider and address the strengths, weaknesses, opportunities, and threats (SWOT) facing Loyola and higher education. During spring 2022, the President spent time listening to many different constituencies about the direction and future of the University. He also participated in SWOT analyses with the Cabinet and the Board of Trustees. From these exercises, the President shared four aspirations he has for Loyola’s future and asked the SPSC to see where and how they resonated with the Loyola community.

President Sawyer believes that at the conclusion of this plan, Loyola could be:

1. Nationally recognized for our dedication to student success, enacted through our commitment to DEI and student wellbeing,
2. Preeminent among the 28 Jesuit colleges and universities for our experiential learning and academic excellence,
3. A leader in demonstrating what it means to care for our common home, and
4. A place where people feel valued and love to work.

The SPSC is charged with consulting and forming partnerships with representatives from our students, faculty, staff, administrators, Board of Trustees, alumni, parents, community partners, and other constituencies to help craft the vision and direction of the next strategic plan for Loyola. The committee will engage with the Loyola community and recommend to the President areas where they see alignment in community feedback and his aspirations.

The committee is charged with formulating a draft of the next strategic plan, which will anticipate the overall strategic direction of the University through 2030.

Finally, the committee is charged with formulating a draft of the next strategic plan, which will anticipate the overall strategic direction of the University through 2030. A draft of the plan should be completed by fall 2023 to be shared with campus constituencies. After review and refinement, a final draft should be ready to be presented to the President for approval in December 2023 and then to the Board of Trustees for their approval at the February 2024 Board meeting.

# Timeline

**Presidential Conversation Tour** (Spring 2022)

President Sawyer meets with various constituencies to discuss Loyola’s future.

**Step 1: Pre-Planning** (Summer 2022)

The SPSC prepares for the launch of the planning process.

**Step 2: Community Idea Sharing** (Fall 2022)

The community is invited to engage in a variety of ways to share ideas and aspirations for Loyola’s future. Through a survey, the community prioritizes top themes in order of importance.

**Step 3: Review & Theme Selection** (Winter 2023)

The SPSC and the Cabinet review community feedback and prioritization and select three to five top themes that become the structure for the strategic plan.

**Step 4: Strategic Initiative Planning** (Spring 2023)

Strategic Initiative Working Groups are formed around themes. These working groups create proposals for specific initiatives that would help Loyola achieve the goals embedded in the themes.

**Step 5: Refinement & Drafting** (Summer 2023)

Proposed initiatives are reviewed by the SPSC, Cabinet, and other constituencies and selected for inclusion in the plan. Development of selected initiatives continues, including determining resourcing needs and assessment criteria. The SPSC pens the first draft of the plan.

**Step 6: Plan Review** (Fall 2023)

The SPSC shares the draft plan broadly for feedback from all Loyola constituents. The plan is revised and shared with the Loyola Conference, Cabinet, and President for approval.

**Step 7: Approval & Implementation** (Spring 2024)

The Board of Trustees is presented with the final plan for adoption. Loyola begins implementation.

# Collecting Community Feedback

The SPSC is committed to ensuring that everyone can engage with this process and share their thoughts and ideas while simultaneously recognizing our shared desire for a successful, thriving Loyola. We are a blessed to be part of a large, thoughtful community with diverse voices, but the need to develop clear focus means that the final plan will not contain every priority and good idea put forward. That does not mean these priorities and ideas do not matter or that they will never be enacted. The goal of this plan is to identify ideas that most resonate with the entire community and that will help us live our mission most effectively. The final plan should align with the themes that President Sawyer has laid out as important – 1) academic excellence, student success and wellbeing, 2) Jesuit values and DEI, 3) care for our common home, and 4) innovative ideas that make Loyola an employer of choice.

**How to Engage**

We have designed numerous opportunities for the community to share their ideas. We highlight three options below. Please check the website for updated information and ways to sign up for specific activities.

**Community Engagement Sessions**

Community engagement sessions will be conducted by trained external facilitators and will focus discussion on the following themes:

|  |  |
| --- | --- |
| **Strengths** | What strengths should Loyola build on to achieve its success?  What differentiates Loyola from other institutions of higher education? |
| **Shortcomings** | Where are our areas of weakness and shortcoming?  Where do we need to grow in order to become successful? |
| **Opportunities** | What opportunities should Loyola pursue to achieve success?  How should we utilize our strengths to capitalize on opportunities? |
| **Aspirations** | What is our greatest dream for Loyola?  What do we aspire to become? |
| **Results** | What will Loyola become as a result of this plan?  What will change as a result of this plan? |

The facilitator will take notes with the participants to accurately reflect the group’s ideas. All notes will remain anonymous. These sessions will also be recorded. All transcripts will be anonymized before being turned over to the data working group of the SPSC for analysis. From the results of this analysis, the data working group will determine what themes are most frequently cited and what information is needed to best understand the community feedback. These determinations will shape the survey that will go out to the entire University community in late Fall 2022.

**Facilitators**: The SPSC has engaged the services of two trained facilitators who know Baltimore and Loyola but are external to the University. Below are short biographies of each facilitator. When signing up for a community engagement session, you will see who is leading that particular session.

**Jessy Molina**

Jessy Molina is a nationally recognized trainer and facilitator on issues of diversity, equity, and social justice. Most recently, Jessy served as the Director of Diversity, Equity, and Social Justice at Friends School of Baltimore. She has supported people to connect with one another and make social change through her work with the Ella Baker Center for Human Rights in San Francisco, the John Gardner Center for Youth and Their Communities at Stanford, Quality Education as a Constitutional Right, and Welcoming America. Prior to working at Friends, Jessy served as the Director of Diversity and Inclusion at Garrison Forest School. An experienced facilitator, Jessy has trained thousands of people at nonprofits, companies, law firms, schools, colleges and universities, and other institutions to recognize and dismantle bias, develop the language and courage to discuss race, create equitable policies and practices, explore the intersections of race, gender, class, sexuality, gender identity, religion, culture and more, and begin building a more just world. Jessy has also developed a model of facilitated dialogue that builds understanding and connection between people and communities who are divided by tension, conflict, and misunderstanding. She has facilitated meaningful dialogue in communities across the country on race and racism, immigration, the criminal justice system, public and private education, policing, ethics, and values, and more. Jessy also trains others to facilitate courageous conversations and equity seminars in their communities and serves as a mentor for trainers and facilitators in the Baltimore/Washington D.C region. Jessy graduated from Harvard College and Yale Law School and lives in Baltimore with her husband, Michael, and two children.

***A person wearing glasses

Description automatically generated with low confidence*Joe Raia**

Joe is the founder and President of Glimmerglass Consulting & Training. He brings to his clients an extensive internal and external consulting and training background in leadership development, organizational effectiveness, and human resources management. An outstanding facilitator, consultant and trainer, Joe provides the appropriate consulting balance of insight, guidance, and partnership to help clients strengthen cultures and achieve results. He works with leadership teams at the Board, senior executive, mid-management, and front-line supervisory levels to assess and enhance their effectiveness. He designs, customizes, and delivers a broad range of leadership and management development programs and processes. Joe designs and facilitates a wide variety of off-site meetings, retreats, and strategic planning, change management and performance improvement processes. Prior to forming Glimmerglass in 1996, Joe was Vice President with Management Partners. His corporate experience includes over a decade in the broadcasting industry, including roles as Director of Organization and Management Development with the National Broadcasting Company (NBC) in New York and Director of Human Resources for WJLA-TV in Washington, D.C. Joe holds an M.A. in Industrial-Organizational Psychology from Rensselaer Polytechnic Institute and a B.S. in Psychology from the State College of New York at Oneonta.

**Coffee and Conversation**

For those community members who cannot attend a community engagement session or who prefer a different environment, SPSC committee members are available to meet and chat.

**Community Survey**

The SPSC has created a working group to review all the data collected through community engagement efforts to discover common themes, concerns, and aspirations. Based on the initial feedback from the community, the data working group will create a survey that will be sent to all Loyola constituencies asking for more details and requesting the community rank order the themes that were most commonly raised. The results of this survey will be analyzed and presented to the entire SPSC as well as the Cabinet and the Loyola Conference.

**When to Engage**

The following graphic **highlights** when community members can engage in each step of the process.

# The Steering Committee

In spring 2022, the President announced the formation of a Strategic Planning Steering Committee (SPSC) and invited submissions for nomination. The President and Cabinet reviewed applicants and selected committee members guided by a goal of being as inclusive and diverse as possible.

The SPSC has the following representation:

* Faculty representatives from Loyola College of Arts & Sciences (LCAS), the Sellinger School of Business and Management (SSBM), and the School of Education (SoE)
* Administrative representatives
* Staff representative
* Alumni representative
* Board of Trustees representative
* Student Government Association (SGA) representative

The SPSC is composed of the following individuals. Please reach out to any member with questions, to discuss the process, to arrange a meeting, and/or to share ideas.

* Kerry Boeye, Ph.D., associate professor of fine arts
* [Wendy Bolger](mailto:webolger@loyola.edu), director of the Simon Center for Innovation & Entrepreneurship
* [Seán Bray](mailto:sbray@loyola.edu), interim vice president for mission
* [Michelle Cheatem](mailto:mlcheatem@loyola.edu), Ed.D., associate vice president for student development
* [Lynne Elkes](mailto:LElkes@loyola.edu), MBA, teaching assistant professor of economics
* [Stephanie Flores-Koulish](mailto:sfloreskoulish@loyola.edu), Ph.D., professor of education specialties
* [Frank Golom](mailto:fgolom@loyola.edu), ‘04, Ph.D., associate professor and department chair of psychology
* [Sara Hayward](mailto:sara.ann.hayward@gmail.com), ’11, alumni representative
* [Alexa Junikiewicz](mailto:ajjunikiewicz@loyola.edu), ’24, Student Government Association representative
* Matthew Kudler, ’06, MBA ’18, director of advancement communications
* Kirsten Lichtner-Baase, executive assistant for the Sellinger School of Business and Management
* Jennifer Louden, M.A. ’17, dean of undergraduate admission
* Jen Lowry, Ph.D., associate professor of psychology and chair of the faculty
* Michael Mansfield, assistant vice president for financial and auxiliary operations
* Eric Nichols, vice president for enrollment management, co-chair
* Paola Pascual-Ferrá, Ph.D., associate professor of communication, co-chair
* Michael Puma, dean of undergraduate studies
* Daniel Rizzo, ’99, trustee
* Kerry Tan, Ph.D., associate professor of economics
* Michael Tangrea, Ph.D., ’96, endowed professor of innovation and biology

*Ex Officio* Members:

* Terrence Sawyer, J.D., president
* Cheryl Moore-Thomas, Ph.D., interim provost
* Gerry Holthaus, ’71, chair, board of trustees

The committee is supported by the following individuals:

* Stephanie Brizee, Ph.D., special advisor to the president
* Rita Buettner, director for university communications
* The Rev. Christopher Duffy, S.J., senior associate vice president for mission, planning, and integration
* Tracey Frey, assistant vice president for institutional effectiveness and academic assessment
* Maureen McCord, executive assistant, enrollment

# Roles and Responsibilities

The following defines the roles and responsibilities of individuals and groups across campus for the formation and management of the strategic planning process:

**Every Member of the Loyola Community** – All members of our community are invited—and encouraged—to participate in the planning process. Although not all input will be directly incorporated into the final strategic plan, all input is valuable to the process. Most importantly, all members of the community will be involved in bringing the plan to life as we collaborate to strengthen and advance Loyola University Maryland for generations to come.

**Strategic Planning Steering Committee Co-Chairs** – The SPSC co-chairs will lead the committee and provide overall guidance to the process. They will call the meetings, establish the agenda, coordinate the members, and ultimately are responsible for ensuring the creation of a final plan that is focused and achievable within an agreed upon timeframe.

**Strategic Planning Steering Committee** – The SPSC is responsible for managing the strategic planning process from start to finish and for producing the final product. Specifically, they are responsible for:

* Planning and hosting all feedback and data collection sessions
* Planning and working with the Office of Marketing and Communications to ensure active communication with the community (establishing the website, sending out emails, guiding branding process, etc.)
* Creating and sending out surveys
* Collecting and reviewing data
* Accepting nominations for forming smaller working groups once themes are established
* Overseeing working groups and ensuring they produce recommended objectives that are clear, achievable, and meet the overall goals of the plan
* Communicating with constituents and community
* Ensuring a transparent and fair process

**Strategic Planning Steering Committee Support** – Members from the President’s Office, Marketing and Communications, Academic Affairs, the Cabinet, and Enrollment are providing advisory, coordination, and logistical support to the co-chairs and committee. Their role is to help ensure this process is as smooth as possible and is seamlessly integrated into existing support mechanisms of the University.

**Loyola Conference** – As part of its charge, the Loyola Conference monitors progress on strategic planning and progress toward the University’s mission and goals. The SPSC co-chairs will keep the Loyola Conference apprised of developments throughout the process and will ensure their feedback and input has been properly accounted for in the process.

**President and** **Cabinet** – The President and Cabinet will provide high-level direction for the strategic plan. They will receive frequent updates from the Strategic Planning Steering Committee Co-Chairs and the Strategic Planning Coordinator as the process is occurring and the plan is evolving. The Cabinet will function as the final manager of the plan once it has been approved.

**Board of Trustees** – The Board of Trustees have the final approval over the plan and will work with the President to ensure it is enacted successfully.

The final plan should encapsulate a shared vision that the President is responsible to ensure is enacted for the good of Loyola. The President will work with the Cabinet to ensure the successful completion of the plan. As such, the Cabinet is the final management body for the execution of the strategic plan.

# Appendix: Terms and Definitions

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| **A** | **Assessment**: The purpose of assessment is to foster continuous improvement. Outcomes are assessed by comparing actual results with criteria for success, through the use of measures, clearly defined targets, and analysis. The analysis can lead to the identification of meaningful actions for greater success. |
| **B** | **Benchmark Institutions**: A list of peer and aspirant schools that have desirable traits or outcomes that align with the vision of the strategic plan. A university uses this list of benchmark institutions to compare its strategic progress and position in the market during the implementation of the strategic plan. |
| **C** | **Close-the-Loop Actions**: Actions identified by the organization as next steps for improving the achievement of the outcome statement. The analysis of how well measures meet or do not meet the targets should lead to meaningful decisions for how to improve. |
|  | **Core Values:** Guiding principles of an organization. |
| **D** | **Design Thinking**: Design thinking is a non-linear, iterative process that teams use to understand users, challenge assumptions, redefine problems and create innovative solutions to prototype and test. Involving five phases—Empathize, Define, Ideate, Prototype and Test—it is most useful to tackle problems that are ill-defined or unknown. |
| **G** | **Goal:** A goal is a clearly defined outcome you intend to achieve by the end of the plan. |
| **I** | **Impact:** The long-term effect that specific goals, objectives, outcomes, will have. |
|  | **Individual Performance Plan:** Describes an individual’s work goals and objectives and shows how they connect to the strategic plan of the organization. |
|  | **\*Institutional Effectiveness**: Institutional effectiveness is a reflective, systematic, and ongoing process, the primary purpose of which is the improvement of the University’s progress toward its mission and goals. This is accomplished by using evidence of student growth and achievement, institutional capacity, and institutional vitality to improve educational quality, student support, campus climate and culture, and the University’s engagement with its local and global community. Institutional effectiveness requires us to successfully integrate assessment practices across the institution, provide evidence of student learning outcomes to stakeholders, and use assessment results to guide institutional decision-making and improve student performance. |
|  | **Institutional Learning Outcomes**: University-wide learning outcomes, specifically the Undergraduate Learning Aims, the *Assessable Undergraduate Learning Outcomes*, and the Graduate Learning Goals. These outcomes identify what the University tells students they will be able to know, do, or value upon completion of a Loyola University Maryland undergraduate degree program or graduate degree program, regardless of the program discipline. The institutional learning outcomes are derived from the University’s mission. |
| **K** | **\*Key Performance Indicators (KPI):** An institution-level measurement of performance. The KPI often are selected from measures at a highly summary level that simply indicate the general strength or trajectory of the University’s progress toward mission and goals. Such measures typically do not provide a great deal of nuance but do provide a “big picture” view of institutional performance. These measures typically take strategic levels of investment and sustained effort to “move the needle” over time. |
| **M** | **Measures**: Measures are consistent sources of artifacts, evidence, or instruments that produce data (quantitative or qualitative), which can be analyzed for meaningful insights as to how well the actions taken (strategies, tactics, curricular or co-curricular design, etc.) support the achievement of the outcome. Organizations identify and describe multiple measures (~2-5) for each outcome statement. The analysis of data from multiple measures allows the organization to answer the question, “Is the work we do leading to the intended impact for the primary beneficiary(ies)? And if not, how should we improve?” |
|  | **\*Metrics**: In the case of this document, a general term used as an umbrella for various types of measures of success, other than KPI, at different levels of the institution. Metrics are attributed to a goal and should provide a meaningful measure of the intended outcome of the goal, as related to the level of the university that supports achievement of the goal. The scope of metrics often provides a way to measure performance of shorter-term goals that can demonstrate achievement with more immediacy than the multi-year expectations of improving a key performance indicator. |
|  | **Mission:** Explains the reason an organization exists and why. |
| **O** | **Objective:** An objective is a specific action and measurable steps intended to be taken to achieve a goal. |
|  | **Operational Plan**: Describes the steps an organization will take to achieve its strategic priorities. |
|  | **Organizations**: Operational areas of the University, at various levels. In our reporting system, “organizations” can refer to the University, a University division, a college, or school, an academic or non-academic department, a center, an institute, a program, etc. |
|  | **Outcomes:** Desired end state that is to be achieved. |
|  | **Outcome Statements**: Umbrella term for statements that identify *what* an organization is doing, the primary beneficiary of the action, *the intended impact* to achieve its goals and support achievement of higher-level goals at the institution. |
|  | **Output:** Specific (and usually countable) actions or items that contribute to achieving an outcome. |
| **P** | **Primary Beneficiary**: The main party or parties an organization plans to positively impact through the actions it will take to fulfill a goal. Defining the primary beneficiary with specificity provides a sense of scope and focus. For example, a student-centered goal might define that the primary beneficiary is intended to be part-time graduate students rather than “students” broadly. |
| **S** | **SOAR Analysis:** (Strengths, Opportunities, Aspirations, Results) A study undertaken by an organization to identify its strengths and opportunities and unite everyone behind a shared vision of success. |
|  | **Strategic Cascading (or Alignment)**: This is the process by which an organization’s overarching strategy is disseminated throughout the organization. Each unit creates their own strategies and operational plans to ensure the completion of the overarching strategy. This approach ensures the entire organization remains focused on achieving the same things and each part of the organization understands how their efforts contribute to the success of the plan. |
|  | **Strategic Plan:** High-level plan that lays out the mission, vision, and goals of the organization at the strategic level. A strategic plan helps an organization prioritize specific things in order to achieve specific outcomes. |
|  | **Strategic Priority**: An institution-level goal of the strategic plan. This level of goal guides the University in its operations and resource allocations toward a desired transformational outcome over a defined period. Strategic priorities define what will be different about the University after a strategic plan has been implemented successfully. Strategic priorities are measured by Key Performance Indicators (KPI). KPI are measured over time for the University *and* in comparison to performance of benchmark institutions. |
|  | **Strategy**: The process by which strategic priorities or division-level goals will be accomplished. The strategies broadly define *how* areas of the University will collaboratively work to achieve the strategic priorities, and they are typically attentive to the university values that will be upheld in doing so. Strategies are often measured by monitoring the activities and “outputs” of new initiatives, programs, procedures, or resources, etc. that are devoted to implementing and sustaining the strategy. |
|  | **SWOT Analysis**: (Strengths, Weaknesses, Opportunities, Threats) A study undertaken by an organization to identify its internal strengths and weaknesses, as well as its external opportunities and threats. |
| **T** | **Tactics**: The many detailed actions that go into successful implementation of a strategy. Tactics are often measured by collecting and monitoring the results of the actions taken to implement the strategy, also known as “objectives.” |
|  | **Targets**: the criteria for success identified for each measure. For example, “Annual giving will increase by 10% over the course of the strategic plan.” or “At least 80% of first-time full-time undergraduate students will graduate in four years.” |
| **U** | **Units**: organizations within an institution, typically within a division, such as offices, departments, centers, institutes, and substantive programs. |
| **V** | **Vision**: Creates a mental image of the desired future state of the organization. It is inspirational and aspirational. |

\*= From the *Institutional Effectiveness Assessment Plan* approved by the Loyola Conference in FA21

1. The four Universal Apostolic Preferences are as follows: 1) Showing the Way to God, 2) Walking with the Excluded, 3) Journeying with Youth, and 4) Caring for our Common Home. To read more visit this [website](https://www.jesuits.global/uap/). [↑](#footnote-ref-2)