Nearly 20 print, online, and multimedia stories covering the progress of major initiatives and strategies of Plan 2020 have been shared through various Loyola media channels January-April 2016. In addition, roughly two dozen media stories related to the four institutional priorities have appeared in multiple outlets, including WGN-TV, WBEZ, The Huffington Post, and DNAinfo.com.

Priority I
- Arrupe College has received wide media coverage, including a feature on WGN-TV and a cover story in U.S. Catholic magazine. A cover story on Arrupe was also featured in the winter Loyola magazine.
- The Magis Scholarship and Loyola’s efforts to aid DACA students have been featured in stories appearing on NBCNews.com, The Huffington Post, and in America magazine.

Priority II
- A feature story in the spring issue of Loyola magazine highlighted four faculty members whose research embodies Loyola’s commitment to social justice.

Priority III
- The opening of the Center for Translational Research and Education was featured on LUC.edu, in Loyola magazine, and in Becker’s Hospital Review.
- Stories on the Center for Criminal Justice Research, Policy, and Practice appeared on LUC.edu, in Loyola magazine, and in AJCU Higher Ed News.
- Coverage of events related to this priority included the Health-EQ conference, Quinlan’s April Signature Series event, and the Climate Change Conference. The Climate Change Conference was also the focus of an hour-long broadcast of WBEZ’s Worldview.
- Stories about faculty, students, and alumni working to address community health disparities were the focal point of the 2016 issue of Stritch Medicine magazine.
Priority IV

- The launch of Lake Shore Community Partners was featured on LUC.edu, received several mentions on DNAinfo.com, and was the focus of Alderman Joe Moore’s community newsletter.
- The opening of the Loyola Community and Family Services clinic was covered on LUC.edu and in the spring issue of Loyola magazine.

RECENT ACTIVITY

- Approved or launched eight new Plan 2020 projects
- Some project highlights include:
  - Office of Institutional Effectiveness to launch in July (Tactic 2.C)
  - Faculty development related to faith, reason and justice launches in the Fall (Tactic 3.B)
  - Loyola Community Partners opened in April and the Loyola Community and Family Services opens in June (Major Initiative & Tactics 7A, 7B, 7C)
  - Lake Shore Community Partners teamed up with the Chicago Community Trust to host two On the Table events focusing on neighborhood schools/education and economic development in Rogers Park/Edgewater (Tactics 7A, 7C)
  - Center for Translational Research and Education (CTRE) move-in and opening in April (Tactic 4.B)
  - Health Equity Conference completed and plans for operationalization in progress (Major Initiative & Strategy 4)
  - Center for Criminal Justice launched, collaboration with Cook County developing (Major Initiative & Tactic 6.A)
  - 1,000+ applications for 180 new enrollments at Arrupe College; new faculty hiring (Major Initiative & Tactic 1.A)
  - 875 applications for 50 new enrollments in Engineering Sciences; facilities work completed (Major Initiative & Tactic 5.B)
- Over $660,000 in commitments made in FY16 from the Plan 2020 Strategic Fund to fund projects for current and future fiscal years. Total investment for Plan 2020 initiatives for FY16 from all funding sources (strategic funds, grants, fundraising, etc.) was over $6M; a summary of FY16 Plan 2020 investments is available at the end of this report
- Reviewed draft metrics for all four Institutional Priorities
- Recruited volunteer coordinator for Plan 2020 projects (58 volunteers across 3 campuses)
- Developed promotional materials
- Developed plan for student committee members to train Peer Advisors on Plan 2020 for UNIV 101 and to lead discussions with other student groups at start of academic year 2016-17
- Aligned institutional leadership performance goals with Plan 2020 to help drive implementation

NEXT STEPS

- Monitor status of active projects
- Review new project proposals for approval and funding
- Discuss process and timing of annual review of Plan 2020
- Formalize metrics for Institutional Priorities
- Develop overview and training materials to lead discussions with student groups for the Fall
### Plan 2020 quarterly status

2015-2020 Strategic Plan Implementation and Steering Committee - Initiative Dashboard

Reporting on: Year: 2016; Quarter 2; Approved projects only

<table>
<thead>
<tr>
<th>PRIORITY STRATEGY</th>
<th>Tactic</th>
<th>Initiative</th>
<th>Remarks/Issues/Milestones</th>
<th>Initiative Lead</th>
</tr>
</thead>
</table>
| I.1               | 1.A    | Arrupe College | **Recent Activity:**  
Class of 2017  
- Current retention rate: 91.8%  
- Percent of students who self-identify as a person of color: 95% (70% Latino; 20% African American; 5% White; 3% biracial; 2% Asian)  
- 58% female; 42% male  
- Undocumented students: 34  
- Percent of students who are employed: 64%  
- Average GPA: 2.66  
- Number of students on the dean's list: 46  
- Total enrollment: 145  
- Average class section size: 23  
Class of 2018 (these stats will change as we fill a class of 180)  
- 162 deposits as of May 3, 2016  
- Percent of students who self-identify as a person of color: 97% (61% Latino; 31% African American; 3% White; 2% Biracial; 2% Asian; 1% American Indian)  
- 59% female; 41% male  
- Undocumented students: 33  
- Average GPA: 2.9  
- Average ACT: 17  
- Chicago public schools: 54%; Catholic private: 23%; Charter: 23%  
**Next Steps:**  
- Implement two semester/one summer session to replace five 8 week sessions for more effective curriculum delivery and better transition to four year colleges and universities  
- Onboard new faculty and new college placement director  
- Build career programs to increase student employment and internship opportunities | Fr. Steve Katsouros |
| 1.B               | Support for DACA Students | **Recent Activity:**  
"Students add to their tuition to fund scholarship for undocumented peers" – Loyola’s Magis Scholarship is mentioned in this article highlighting a similar initiative at Prescott College in Arizona. 5.6.16: USA Today College | Paul Roberts (Prober2@luc.edu) |
<table>
<thead>
<tr>
<th>PRIORITY STRATEGY</th>
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<th>Remarks/Issues/Milestones</th>
<th>Initiative Lead</th>
</tr>
</thead>
</table>
| I.2               | 2.A    | Enhance Academic Support and Student Life Programs | **Recent Activity:**  
  • Early Alert Referral System (EARS) pilot project with seven faculty  
  • Student persistence study (aka “Why Students Stay”)  
  • Early Alert RFP development and review  
  • Loyola Experience refresh/relaunch/re-energize  
  • Retention dashboard development  
  • Developing and refining targeted academic support programs – UNIV 101, Supplemental Instruction, Magis project (predictive retention modeling and follow up)  
  **Next Steps:**  
  • Project de-brief scheduled with participating faculty; assessment plan in progress pending end of semester student outcome data  
  • Thirty focus group interviews scheduled deploying 30 volunteers from the Division of Student Development and Student academic Services; interview summaries being received  
  • RFP in final draft stages; initial vendor list established; review team assembled (faculty, staff, and students); timeline for review being finalized  
  • Developing learning outcomes; reviewing publications; continuing discussion of organizational structure and resource need  
  • Data summaries established; data views under review; continuing discussion of public and private facing data views  
  • UNIV 101 curriculum review is ongoing (learning outcome review, cultural fluency content under development); Supplemental Instruction section data being compiled; targeted marketing approach using the predictive retention model under development | Dale Tampke |
| II.3              | 3.B    | Faculty Seminar: Catholic Intellectual Life, Ignatian Pedagogy, and the Pursuit of Justice | **Recent Activity:**  
  • 16 invitations to faculty from across the university were sent out and it looks like 14 will be able to commit to the seminar-long seminar  
  • 8 faculty come from the largest unit, the College of Arts and Sciences, the other 6 come from Law, Social Work, Education, Business, Communication, and Medicine  
  **Next Steps:**  
  • Seminar begins September 2016 | Fr. Mark Bosco; Mbosco@luc.edu |
<table>
<thead>
<tr>
<th>PRIORITY STRATEGY</th>
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<th>Remarks/Issues/Milestones</th>
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</thead>
</table>
| II.3 | 3.B | FCIP Ignatian Pedagogy IP Certificate & Research Grant Initiatives | **Recent Activity:**  
- Announced the new initiatives at IP Certificate meeting; requested names of colleagues who might be interested in 2016-17 participation  
- Began talking with faculty who would be appropriate for the fellows program  

**Next Steps:**  
- Use Fac Post and FCIP listserv, along with direct contact of faculty and staff who have indicated an interest in the certificate program  
- Draft and send letter of information to appropriate faculty for fellows program (graduates of the certificate program from 2015-16 and others who have actively participated in IP programming)  | Carol Scheidenhelm (Cschei1@luc.edu) |
| | 3.C | The Business of Social Justice Conference | **Recent Activity:**  
- Two events held April 21, 2016. Luncheon Symposium on "The Business of Social Justice," featuring Gael Giraud, SJ, Monsignor Michael Boland, Prof. Michael Shuck; Introduction by VC Michael Garanzini, SJ and MC duties provided by Dean Kevin Stevens. Participating Registrants: 130 people from LUC community, business community and other interested stakeholders. Registration fees will be used for scholarships. Second Event, an evening reception and panel, featuring Fr. Giraud, Ms. Nicki Pecori-Fioretti, Prof. A. Malliaris, Prof. Tuncay, Prof. Claassen, Prof. Shultz (Moderator). Registrants: 60 (85 people actually attended); mostly students, some faculty, some community-members. Lively and rich discussion; the panel and ensuing Q&A ran 45 minutes longer than scheduled, due to participants' energy and involvement.  

**Next Steps:**  
- These events, part of the QSB signature series, helped to solidify the school's position as the preeminent business school focused on Social Justice, Global Issues and Transformative Education; they are the springboard for three more Business-as-Social-Justice events to be held at the QSB in the next 18 months, which will further champion the QSB's strategic vision and mission to be "The Business School the World Needs." | Cliff Shultz, Professor and Kellstadt Chair, Quinlan School of Business |
<table>
<thead>
<tr>
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</table>
| III.4    | 4.B    | Health Equity Conference | Recent Activity:  
- Health EQ Conference was held April 26, 2016 in the CTRE at the HSD. Over 120 people were in attendance; 22 community partners, 98 LUC/LUMC reps. Speakers included, Dr. Julie Morita, Comm'r for the Chicago Dept. of Public Health; Dr. Terry Mason, Chief Operating Office of the Cook County Dept. of Health and Dr. Bechara Choucair, MD, MS, senior vice president of Safety Net Transformation & Community Health at Trinity Health  
- The Conference was a wonderful kick-off event for the Health Disparities Strategic Planning discussion. Health Disparities Strategic Planning: Immediately following the Health EQ Conference 3 groups were convened to focus on strategic planning for Health Disparities around the topics of “Education, Research and Community Partnerships”. Each group identified priorities that should be addressed in the Health Disparities Plan. After the focused group planning sessions, all 3 groups reconvened to present their work. Information from all groups was transcribed.  
Next Steps:  
- Health Disparities Committee to review the notes from the Strategic Planning Discussion and develop a strategic plan for Health Disparities  
- Once the Strategic Plan is written, a call will go out across all LUC campuses for proposals to meet the Strategic Plan | Vicki Keough (vkeough@luc.edu) |
|          |        | Ruth K. Palmer Conference | Recent Activity:  
- Ruth K. Palmer Research Symposium. The MNSON held a research conference on April 23, 2016 in the CTRE at the HSC focused on Population Health. Dr. Bakken, PhD, RN, FAAN, FACMI, Alumni Professor of the School of Nursing and Director for the Center for Evidence-based Practice in the Underserved, Columbia University, New York was the keynote speaker.  
- The conference was well attended with 155 registrants from the Chicagoland area and stimulated discussion focused on the use of data science to address health disparities.  
Next Steps:  
- Health Disparities Committee to review the notes from the Strategic Planning Discussion and develop a strategic plan for Health Disparities.  
- Once the Strategic Plan is written, a call will go out across all LUC campuses for proposals to meet the Strategic Plan. Plan Palmer Research Symposium for Spring, 2017 | Dr. Karen Saban, Associate Dean for Research, School of Nursing |
### PLAN 2020

**2015-2020 Strategic Plan Implementation and Steering Committee - Initiative Dashboard**

**Reporting on:** Year: 2016; Quarter 2; Approved projects only

<table>
<thead>
<tr>
<th>PRIORITY STRATEGY</th>
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</tr>
</thead>
</table>
| III.4             | 4.B    | Center for Translational Research and Education (CTRE) | **Recent Activity:**  
  • Construction completed on-time, on-budget  
  • Four month move-in completed  
  • All labs fully functioning  
  • Closed out 190K square feet of lab space in LUHS facilities  
  • CTRE blessing and ribbon cutting completed April 21, 2016  
  • Campus wide open house completed April 22, 2016  
  • Palmer Research symposium completed April 23, 2016 | Steve Bergfeld (sbergfeld@luc.edu) |
|                   | 4.C    | Health Disparities Endowment | **Recent Activity:**  
  • Integrating HSD and LUHS Development teams under one VP for Development  
  • Completed screening interviews with three VP for Development Candidates  
  • Moving HSD and LUHS development teams into Maguire the week of May 23, 2016 | Steve Bergfeld (sbergfeld@luc.edu) |
| III.5             | 5.A    | Implement IES Programs | **Recent Activity:**  
  • Freshman enrollment application increase of 44%, admits increase of 52%, and net deposit increase of 100% over this time last year  
  • Transfer student enrollment application increase of 59%, admits increase of 48% over this time last year  
  • Hired one full-time x88 NTT faculty: Laura Brentnner, PhD.  
  • Hosted workshops with industry professionals to develop curriculum for one of three professional certificate programs to start in Fall 2017  
  • Developing proposal for MS in Environmental Science to begin in Fall 2017  
  • Developing proposal for Masters in Environmental Science for Professionals to begin in Fall 2018 | Nancy Tuchman (ntuchma@luc.edu) |

**Next Steps:**
- Revising IES undergraduate curriculum to boost science
- Host remaining workshops for professional certificate programs
- Submit proposal for MS in Environmental Science to begin Fall 2017
- Continue to develop proposal for Masters in Environmental Science for Professionals to begin Fall 2018
<table>
<thead>
<tr>
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<th>Initiative</th>
<th>Remarks/Issues/Milestones</th>
<th>Initiative Lead</th>
</tr>
</thead>
</table>
| III.5             | 5.B    | Institute of Engineering Science | Recent Activity:  
- Recruitment activities (Director’s phone calls to admitted students, video of ENGR 101, Loyola Weekend ENGR Tours) yielded 51 deposited students. Fall enrollment goal is 48 students  
- Two new faculty members, who are very committed to social justice, hired  
- NSF Revolutionizing Engineering Departments (RED) proposal submitted: *Sparking a Revolution Through Social Justice*  
- NSF INCLUDES (Inclusion across the Nation of Communities of Learners of Underrepresented Discoverers in Engineering and Science) preliminary proposal submitted: *Increasing the Enrollment of African American and Hispanic Chicago High School Graduates in BS Engineering Programs Through Collective Impact*. The Co-PIs are School of Education professors  
- Architectural drawings for temporary teaching labs completed  
Next Steps:  
- Construction of teaching labs for Fall, 2016 | Gail Baura |
| III.6             | 6.A    | Center for Criminal Justice, Research, Policy and Practice | Recent Activity:  
- Grant proposal submitted($40,000/ICJIA)  
- Support for 3 graduate research assistants  
- National/local presentations;  
- Outreach to Schools/Departments  
- Research and Issue Briefs designed/populated  
Next Steps:  
- Co-sponsor Research Forum on PTSD in criminal population (May 24, Loyola)  
- Plan upcoming Juvenile Justice Research Consortium  
- Develop curricular plan | Diane Geraghty |
<table>
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</thead>
</table>
| III.6             | 6.C    | Become a University that is among the safest urban campuses                | **Recent Activity:**  
   • Began researching what it would take to lock down all Lakeside campus classrooms on both Campuses in the event of an emergency  
   • Campus Transportation reports that new 8 ride app is in operation  
   • Community Safety group is attempting to identify steps to contribute new safety measures (street lighting, safety zones, etc.) to the area  
   • Held successful Campus Safety Forum (February 16th); these forums will be planned for every semester  
   • Held Active Shooter Education Program (January 14th) for University Deans  
   • Continuing to meet with departments on both campuses for site evaluations and assessments, and assisting with their emergency planning  | Tom Murray      |
|                   |        | **Next Steps:**  
   • Explore possible use of laptops in campus squad cars for immediate access to information, and to keep personnel on patrol for a higher percentage of the watch  
   • Begin assessing a gunshot detection system that would increase emergency response to campuses  
   • Reallocate a security officer to the function video surveillance investigative efforts, utilizing personnel and University assets in directing patrols and acquiring intelligence as a force multiplier |
### Plan 2020 quarterly status

**2015-2020 Strategic Plan Implementation and Steering Committee - Initiative Dashboard**

**Reporting on: Year: 2016; Quarter 2; Approved projects only**

<table>
<thead>
<tr>
<th>Priority Strategy</th>
<th>Tactic</th>
<th>Initiative</th>
<th>Remarks/Issues/Milestones</th>
<th>Initiative Lead</th>
</tr>
</thead>
</table>
| IV.7              | 7.A    | Lakeshore Partners Community Development Initiative | **Recent Activity:**  
- Opened community partnership storefront office on April 8, 2016 with over 100 attendees at grand opening reception.  
- Schools 2020: Hosted three meetings of faculty, staff, principals, parents and community leaders (117 people) to learn breadth and depth of Loyola engagement and unmet needs in neighborhood schools. School of Education solidified teacher-preparation partnership with every one of the schools in Edgewater and Rogers Park for academic year ’16-'17.  
- RogersEdge Business Improvement Initiative: Hosted 10 meetings with neighborhood Chambers of Commerce and 54 business owners in order to build support for the initiative, draft a mission statement and first year goals which include a new visual identity, improved street lighting, retail attraction guide, ten new business openings, improved social media presence and increased attendance (+10%) at all 2016 place-making events.  
- Partners for Safety: Working with IP3 to create a plan for a Loyola Safety Week in Fall 2016 that includes launching a new FBI-supported student organization within the School of Law.  
- Partners for Faith: Department of Ministry and Community Relations have held three meetings with local parish pastors and LUC staff to determine the potential scope of potential programmatic partnerships.  
**Next Steps:**  
- Schools 2020: Next Steps: Analyze data collected, write report, create an action plan and new project criteria for FY17-18.  
- RogersEdge Business Improvement Initiative: Engage local property owners, business owners and neighbors to evaluate and prioritize needed infrastructure improvements that would support the commercial districts.  
- Partners for Safety: Develop programmatic priorities and responsible staff for AY ’16-'17.  
- Partners for Faith: Recruit youth from St. Gertrude’s and St. Ignatius to participate in Lily-funded camp at Loyola University in summer 2016. | Summur Roberts (Srober6@luc.edu) |
<table>
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<tr>
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<th>Initiative</th>
<th>Remarks/Issues/Milestones</th>
<th>Initiative Lead</th>
</tr>
</thead>
</table>
| IV.7              | 7.B    | Loyola Community and Family Services | **Recent Activity:**  
- Created clinic infrastructure to provide community based mental health services  
- Organized two open houses for both the university members and community partners in Rogers Park and Edgewater to promote clinic and services offered  
- Hired full staff (administrative assistant, social worker, school psychologist) to provide services  
- Accepted 6 trainees to begin their clinical training in the Fall of 2016. The trainees include 4 doctoral candidates from Loyola’s School of Education (2 from counseling psychology and 2 from school psychology) and 2 master’s level social work candidates from Loyola’s School of Social Work  
- Outreach and participated in local community events to promote our services  
**Next Steps:**  
- Opening targeted for June 2016  
- Develop relationship with local schools in Edgewater and Rogers Park (Sullivan, Senn, Swift, Jordan) to provide school based services in the Fall of 2016  
- Develop training model and schedule for Loyola trainees  
- Create Community Board to help guide direction of clinic services | Richard Renfro (rrenfro@luc.edu) |
| IV.8              | 8.C    | John Felice Rome Center | **Recent Activity:**  
- 110 undergraduates enrolled for Summer 2016 programs  
- 159 Study abroad students and 26 Rome Start students deposited for Fall  
- New apartments now in use  
**Next Steps:**  
- Discussion of construction project | Patrick Boyle (pboyle@luc.edu) |
## LOYOLA UNIVERSITY CHICAGO
### SUMMARY OF PLAN 2020 FUNDING
#### FY 2016 BUDGET & AVAILABLE FUNDING SOURCES
#### AS OF MAY 5, 2016

<table>
<thead>
<tr>
<th>Institutional Priority</th>
<th>Funded by Strategic Plan</th>
<th>Funded from other internal sources</th>
<th>Fundraising</th>
<th>Grants</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INSTITUTIONAL PRIORITY I:</strong> Leverage University resources to ensure student access and success</td>
<td>-</td>
<td>1,720,943</td>
<td>1,912,287</td>
<td>784,000</td>
<td>4,417,230</td>
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<tr>
<td>Total Institutional Priority I</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>INSTITUTIONAL PRIORITY II:</strong> Advance our social justice mission through faculty development</td>
<td>109,000</td>
<td>1,000</td>
<td>-</td>
<td>-</td>
<td>110,000</td>
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<tr>
<td>Total Institutional Priority II</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td><strong>INSTITUTIONAL PRIORITY III:</strong> Promote multidisciplinary collaboration to address societal challenges</td>
<td>4,500</td>
<td>809,046</td>
<td>-</td>
<td>300,000</td>
<td>1,113,546</td>
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<tr>
<td>Total Institutional Priority III</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>INSTITUTIONAL PRIORITY IV:</strong> Engage local and global societal challenges through partnerships</td>
<td>94,000</td>
<td>356,744</td>
<td>-</td>
<td>-</td>
<td>450,744</td>
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<tr>
<td>Marketing of Plan 2020</td>
<td>6,684</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>6,684</td>
</tr>
<tr>
<td><strong>TOTAL FUNDING ALLOCATED FOR PLAN 2020</strong></td>
<td><strong>$ 214,184</strong></td>
<td><strong>$ 2,887,733</strong></td>
<td><strong>$ 1,912,287</strong></td>
<td><strong>$ 1,084,000</strong></td>
<td><strong>$ 6,098,204</strong></td>
</tr>
</tbody>
</table>
**LUC Plan 2020 Steps to Implementation**

**Translate Goals**
- Identify major efforts required to make progress towards strategic goals
- Develop project proposal and volunteer process to include accountability, milestones, budget, activities, timeline, etc.
- Determine how success will be measured (metrics)

**Create a Blueprint**
- Identify interdependencies and project integrations
- Assess resource requirements
- Develop realistic timelines given current workloads
- Build overall implementation calendar

**Mobilize the Teams**
- Identify & prioritize requirements
- Expand involvement and engagement on projects and strategies
- Align institutional resources and individual goals to support the strategies
- Manage and support project proposal process

**Align Finances**
- Develop process for approval and funding of projects
- Determine process for tracking budgets
- Determine if adjustments are needed to accommodate fiscal year planning

**Monitor Progress**
- Establish quarterly reporting for health and status of projects; annual review for entire plan
- Assess on-track/off-track for resources, funding, timeline
- Develop method for status reporting for projects

**Review, Revise and Repeat**
- Review for changes in internal/external landscape, assumptions and processes
- Determine if adjustments are needed
- Implement adjustments as appropriate
- Develop dashboard for measuring Plan 2020 impact

**Committee Input and Guidance**

**Communications**

- WIP = Work In Progress

Adaptations Made From: “Living Into Your Strategic Plan: A Guide to Implementation That Gets Results” By Jacquelyn Hadley, Laura Lanzerotti, and Adam Nathan (bridgespan.org)

Other Resources: “Strategic Planning in Higher Education: Best Practices and Benchmarking” By Hanover Research