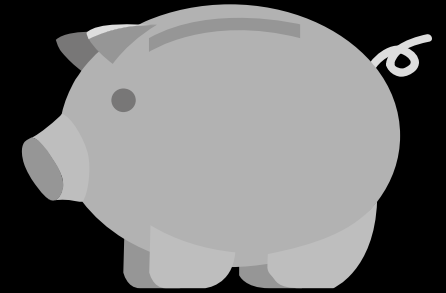


“Weigh the Pig, Feed the Pig, Weigh the Pig Again”



Outcomes Assessment- Breathing Life into Strategic Planning
Lisa Castellino, PhD Office of Institutional Research and Planning

Administrative Affairs

Professional Development 2015

Housekeeping

FAQ

- Scheduled from 1PM to 5PM today.
 - “That’s a long time to sit!”
- This work is meant to be interactive- ask questions at any time!
 - Distractions at a minimum. Electronic devices OFF! If I catch you on one I will call you out. You too, Joyce!
- This work is meant to be educational- everyone is at different levels of skill. The goal- a common understanding, vocabulary, and process moving forward.
- This work is meant to be transformational- and that, at times, can be challenging and even scary- have no fear, this is NOT about finding errors, but finding opportunities.
- This work is meant to be on-going- outcomes assessment never stops- welcome to the rabbit hole and we will meet again.

What you can expect to learn today

1. You will be able to articulate 'assessment 101' and sound like a consultant.
2. You will have a sense of what we mean by a 'whole brain approach' planning implementation.
3. You will be able to explain the difference between an objective and an outcome; and why that difference matters.
4. You will be able to identify ONE Objective and ONE outcome for your unit.
5. You will be able to know meaningful measurement when you see it.
6. You will begin incorporating these skills into your work- hint, you need to.

Why this work matters

1. We planned, now we need to implement.
2. We need to do so in a coordinated or at least thoughtful manner.
3. Campus is not hitting Powerball any time soon.
4. I don't know about you, but I am busy! Prioritize and resource effectively.
5. Removes ambiguity- all on the same page.
6. Vice Presidents can better advocate with proper information.
7. Our purpose is to serve our students, period.

Title

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Section I

Plan the Work, Work the Plan



Our Guidebook

- Goal 4: Serve as effective stewards of the natural and built environment and the University's financial resources with a focus on sustainability.
 - Objective: 4.3 Expand resources to support the University's mission, including identifying new resources, finding efficiencies, and being good stewards of existing resources.
 - Performance Indicator: Incorporate HSU's focus on environmental sustainability fully into the operations of the University. (really an outcome)



Same Stuff, Different Day

- We need a common language.
- We need a common understanding of what we mean by...
- We need a common set of expectations for each other (oh they can do that).
- We need a way to discern what needs to be prioritized and when.
- We need to demonstrate.

Section II

Implementing the Plan using the “whole brain”.

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Exercise #1

How do you use E-mail?



What do you feel is the best use of E-mail?

- A. Transferring information
- B. Sharing ideas
- C. Move things along
- D. Building relationships

What is your primary goal when sending E-mail?

- A. Clarifying wrong data
- B. Redirecting to the right problem
- C. Getting others to do more
- D. Placing responsibility properly

What most irritates you when getting E-mail?

- A. Bombarding me with unnecessary facts
- B. Giving me redirection on a project/task
- C. Requesting action/ forcing a deadline
- D. Resolving people issues

If you could ask others to do ONE thing differently when sending E-mail, what would it be?

- A. Provide more detail up front
- B. Put things/ requests into context
- C. Be more specific about next steps
- D. Be more considerate/ soften tone of E-mails

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Exercise #1

Results



Managing Change 101

Considering all options

What?

Facts/Blue

Rational and analytical

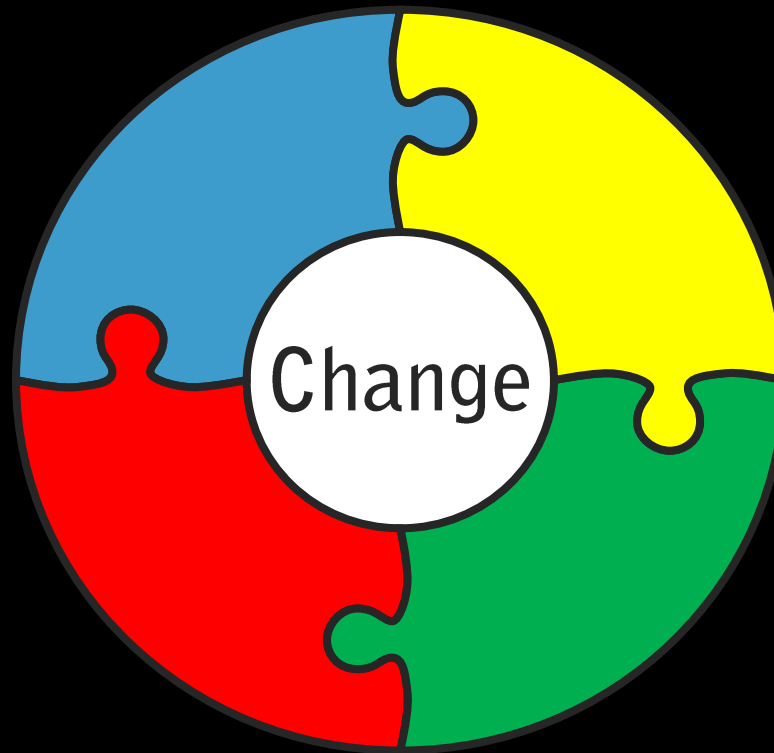
“What’s the bottom line?”

Feelings/Red

Who?

Interpersonal and people
focused

“How will the solution
address people’s needs?”



Why?

Ideas/Yellow

Conceptual and intuitive
folks

“What’s the big picture?”

How? Actions/Green

Detailed and planned

“How we will organize?”

Managing Change 101

Considering all options

What? Facts/Blue

Rational and analytical

“What’s the bottom line?”

What are all the facts?

What are the logical holes?

What evidence supports or
contradicts my position?

The thinkers



Objectives and
agendas in advance.
Focus on bottom line
and be succinct.

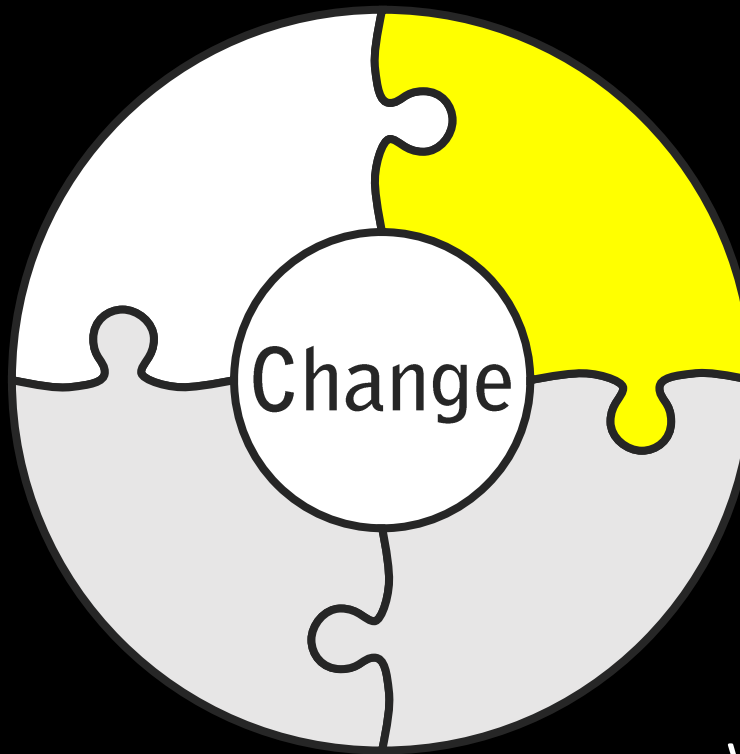
Provide appropriate
data/details.

Evaluate the process
for improvement.

Managing Change 101

Considering all options

Time for 'out of the box' thinking.
Variety and fun.
Time for brainstorming.
Vision and the future.
Objects to stimulate thinking.



Why?

Ideas/Yellow

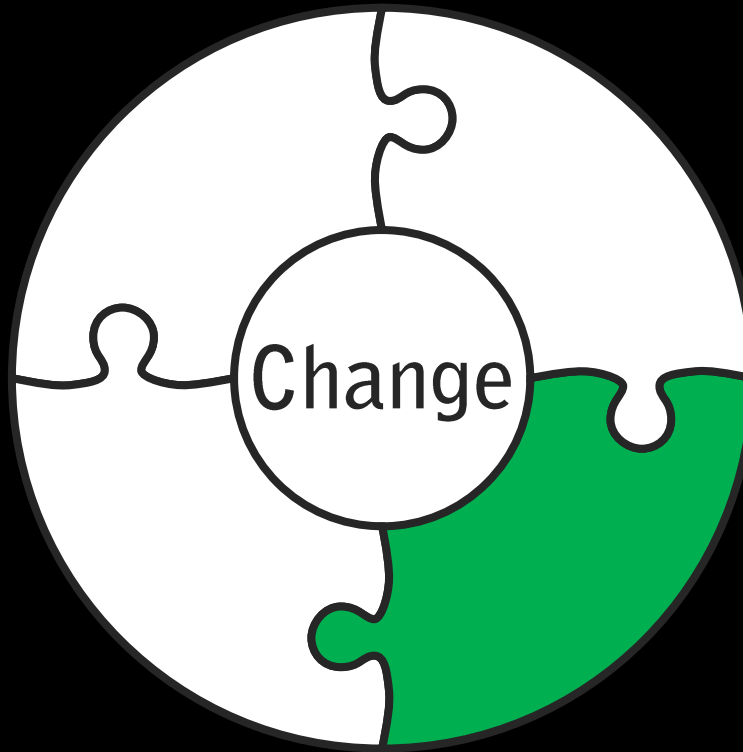
Conceptual and intuitive folks
"What's the big picture?"

What is the big picture or context?
What other possibilities exist?
What concepts does it link or clarify?
Ideas...action?

Managing Change 101

Considering all options

- Consistent in meeting protocols.
- Notes before and after meetings.
- Establish action items.
- Stay on track.
- Assign clear roles.
- Sticking to an agenda, they see in advance.



- What details have been forgotten?
- What is the appropriate sequence?
- How can this be organized or controlled?
“the doers”

How?

Actions/Green

Detailed and planned
“How we will organize?”

Managing Change 101

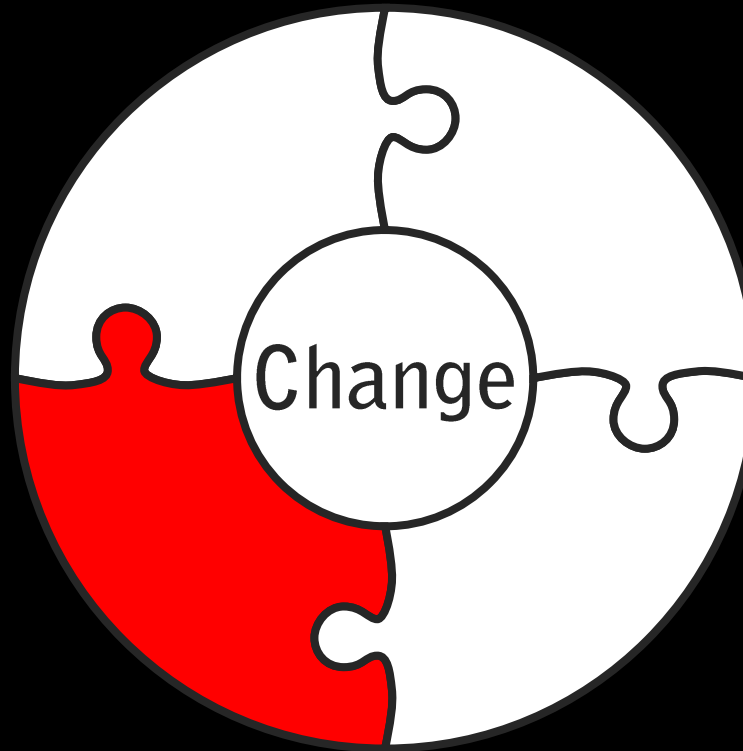
Considering all options

How will folks respond?

What is the most user-friendly solution?

How does this solution address people's issues?

The feelings



Feelings/Red **Who?**

Interpersonal and people focused

“How will the solution address people's needs?”

Connect and check in.

Encourage all voices be heard.

Respect for all ideas.

Time for sharing and building trust.

Include diverse attendants.

Food, drink, comforts.

Mostly
A's=
What?

Mostly
B's =
Why?

Change

Mostly
D's=
Who?

Mostly
C's=
How?

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Section III

Objective and outcomes



*Example: HSU Umbrella Corp.
Vision 2020 Strategic Plan*

Unit Goal: Become leaders in the field of umbrella logistics and distribution in Humboldt County through strategic and sustainable acquisition, deployment and management of umbrellas to meet the County's weather needs.

Objectives and outcomes
helps make sense of the
goals...

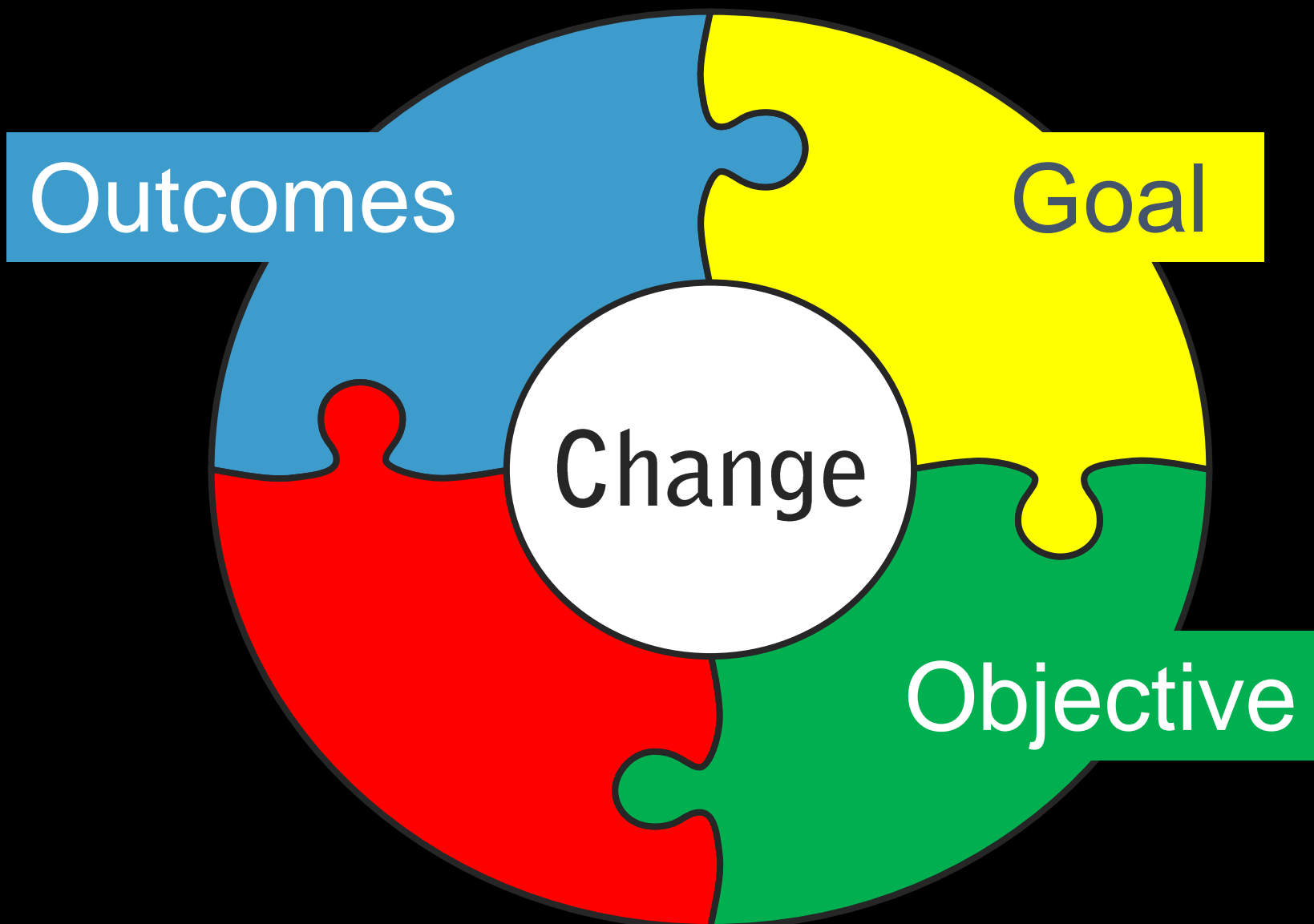
...because no one really
understands what they
mean in the first place...

What is the difference between an objective and an outcome, and why do I even care?

- Objective: Action-oriented statement- how?
 - Buy all the umbrellas locally.
 - Sell umbrellas for a 50% mark-up.
- Outcome: What do you hope to achieve once your objective is realized, or met?
 - See profits increase by 100%.

The Dos and Don'ts of Building Effective Objectives and Outcomes?

- DOs
 - Keep it simple
 - Keep it relevant
 - Keep it manageable
 - DO- Keep resources in mind
- DONTs
 - Create MORE than 3 Objectives per Goal
 - Create MORE than 3 Outcomes per Objective
 - Try to assess everything, every year.



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Section IV

Measuring results



How do I 'weigh' the pig?

- **What** is being measured?
- **Why** choose that measure vs. another one?
- **How** will it be measured?
- **Who** will be doing the measuring?

How do I 'weigh' the pig? (cont.)

- Assessing how well you met your objective is the cornerstone of this work- without measurement you are guessing, and most likely doing so poorly.
 - Measurement- simple, complex, ridiculous
 - Daily, weekly, monthly, yearly, every few years
 - Baseline or no baseline?

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Meaningful Measurement...



Example: HSU Umbrella Corp.

Measurement	Operational Definition	Baseline Year	Baseline Measurement	Direction	Measurement Timetable	Source
Umbrella Inventory	Total # of umbrellas in inventory	2015	200	Stable	Quarterly	Warehouse
Umbrella Sales	Total # of umbrellas sold	2015	60	Increase	Quarterly	Sales Dept
Umbrella Returns	Total # of umbrellas returned	2015	10	Decrease	Quarterly	Customer Service
Umbrella Purchases into Inventory	Total # of umbrellas purchased from vendors	2015	80	Stable	Quarterly	Purchasing

Example: HSU Umbrella Corp.

Measurement	Operational Definition	Baseline Year	Baseline Measurement	Target Direction	Measurement Timetable	Corrective Action
Umbrella Return/Sales Ratio	Total # of Umbrellas Returned/Number of Umbrellas Sold	2015	$10/60 = 16.7\%$	Decrease	Quarterly	If percentage increases, discuss sales strategy with Manager to recommend changes.
Umbrella Sales/ Umbrella Inventory Ratio	Total # of Umbrellas Sold/Number of Umbrellas in Inventory	2015	$60/200 = 30\%$	Increase	Quarterly	?
Umbrella Sales/ Umbrella Purchases to Inventory Ratio	Total # of umbrellas Sold/ Total Number of Umbrellas Purchased from Vendors	2015	$60/80 = 75\%$?	Quarterly	?
?	?	?	?	?	?	?

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Section V

Applying what you have learned



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Exercise #2

Objective and outcomes



Developing your own unit objectives and outcomes

- Review homework assignments—
 - Was your objective really an objective or an outcome, or a measurement?
- How would you rewrite it, if at all?
- Share with the group.

Results

- Review homework assignments-
 - Was your objective really an objective or an outcome, or a measurement?
- How would you rewrite it, if at all?
- Pick a spokesperson and share with the group.

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Exercise #3

Creating meaningful measurement



For your ONE Objective, create a way of measuring its performance.

- **What** is being measured?
- **Why** choose that measure vs. another one?
- **How** will it be measured?
- **Who** will be doing the measuring?



Results

- **What** is being measured?
- **Why** choose that measure vs. another one?
- **How** will it be measured?
- **Who** will be doing the measuring?

Parting Thoughts

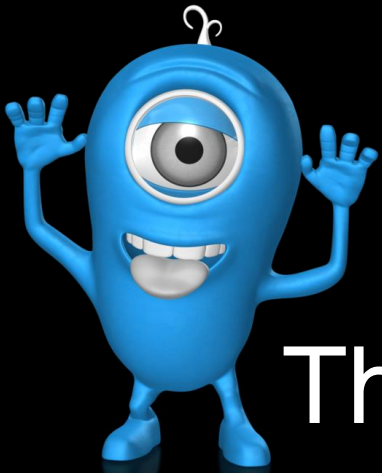
- **What**ever stage you are at in outcomes assessment is a good thing.
- **Why** this work is important hopefully is clear.
- **How** we incorporate this work will be challenging but rewarding.
- **Who** we as a campus can become resides within you.

Institutional Research and Planning

- **Who** we are:

- Lisa Castellino x5339 Lisa@Humboldt.edu

- **What** we can do is help.



Thank you for your time, patience and humor.