



Administrative Guidelines for Creating Plan 2008: Phase I Report (1999-2003)

Andrea-Teresa "Tess" Arenas
Assistant Vice President for Academic Affairs
Senior Advisor to the President for Academic Diversity
UW System Office of Academic Diversity and Development
780 Regent St. Room 305
Madison, WI 53715

For Phase I Report guideline information contact:

Maya Holtzman
mholtzman@uwsa.edu
Phone: (608) 263-1585
Fax: (608) 263-2046

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Introduction

In May 1998, the UW System Board of Regents unanimously adopted the ten-year *UW System Plan 2008: Educational Excellence through Racial and Ethnic Diversity* (Plan 2008). Between June 1998, and May 1999, each UW System institution developed Plan 2008: Phase I (1999-2003). In the institutional Plan 2008: Phase I, each institution: a) prioritized the seven strategic goals of *Plan 2008* based on institutional needs, b) identified initiatives and strategies used to achieve the goals of *Plan 2008*, and c) set implementation timelines. In June 1999, the UW System Board of Regents adopted the institutional Plan 2008: Phase I. Since June 1999, all UW System institutions have been engaged in implementing their Plan 2008: Phase I.

The year 2003 marks the midpoint of ten-year *UW System Plan 2008: Educational Excellence through Racial and Ethnic Diversity* and the time for all UW System institutions to review and report on the impact of Plan 2008: Phase I related activities. Institutions should submit Plan 2008: Phase I Report to the Office of Academic Diversity and Development by **February 17, 2003**. President Katharine C. Lyall and Assistant Vice President Andrea-Teresa "Tess" Arenas will provide feedback to the Chancellors by **April 1, 2003**.

Plan 2008: Phase I Report Timetable

Figure 1 provides UW System institutions a timetable for submitting Plan 2008: Phase I Report (1999-2003) to UW System.

Figure 1
Time Table for Submitting Institutional Plan 2008 Phase I Report

Activity	Date
UW System Office of Policy Analysis and Research (OPAR) provides to the institutions five-year (1997-2002) student quantitative data.	December 2, 2002
UW System Human Resources (HR) provides to the institutions five year (1997-2002) faculty and staff quantitative data.	December 2, 2002
UW System Multicultural Center for Educational Excellence (MCEE) provides to the institutions five-year (1997-2002) precollege participation data.	January 2, 2003
Institutions and UW System Administration Units submit Plan 2008: Phase I Report (1999-2003) to UW System Office of Academic Diversity and Development (OADD).	February 17, 2003
UW System Reviews Institutional Plan 2008: Phase I Report (1999-2003).	February 17 to June 2, 2003
President Lyall and Assistant Vice President Arenas provide feedback on Institutional Plan 2008: Phase I Reports (1999-2003) to Chancellors. President Lyall provides feedback to UW System Administration units.	April 1, 2003
UW System Administration prepares UW systemwide Plan 2008: Phase I Report 1 st draft for the Board of Regents.	April 2-June 13, 2003
Finalize Phase I Report	August 15-September 23, 2003
UW System wide Plan 2008: Phase I Report is delivered to Board of Regents office for mailing.	September 24, 2003
UW System wide Plan 2008: Phase I Report is presented to Board of Regents.	October 9, 2003

Plan 2008: Phase I Report Content

The Plan 2008: Phase I Report will be a document that combines the use of both qualitative and quantitative data. Given the abbreviated timeline allowed for institutions to create the Phase I Report, The Office of Policy Analysis and Research (OPAR) and the Office of Human Resources (HR) will provide institution specific data for Fall 1997 to Fall 2002 by December 2, 2002. The Multicultural Center for Educational Excellence (MCEE) will provide precollege participation data by race/ethnicity and institution for the period of 1997-2002 by January 2, 2003. Note, 1997 is the benchmark year prior to implementation of Plan 2008 in 1998. This data will include:

From UW System Multicultural Center for Educational Excellence (for 1997-2002):

- Total precollege participation data by race/ethnicity, gender and institution

From UW System Office of Policy Analysis and Research (for 1997-2002):

- Degrees Conferred by level, race/ethnicity, gender and institution
- Wisconsin Immediate New Freshman applications, admissions, enrollment by race/ethnicity, gender, and institution
- Graduation and retention rates by race/ethnicity, gender, and institution
- Total Enrollment by level by race/ethnicity, gender, and institution
- Total Enrollment by Traditional and Non-Traditional Status, race/ethnicity, gender, and institution
- Service Rate by race/ethnicity, gender and institution
- Yield Rate by race/ethnicity, gender and institution

From UW System Human Resources (for 1997-2002):

- Total Staff by Faculty, Classified, and Academic Staff by race/ethnicity, gender, and institution
- Total Faculty by race/ethnicity, gender, and institution
- Total Classified Staff by race/ethnicity, gender, and institution
- Total Academic Staff by race/ethnicity, gender, and institution
- Total Administrators (Limited Term) by race/ethnicity, gender and institution

Your institution will primarily focus on the collection of qualitative data regarding the progress on each of the seven goals in Plan 2008. This will include: highlights of outstanding accomplishments, including new and continuing initiatives in precollege; recruitment (faculty, staff and students); retention (faculty, staff and students); financial aid to students; faculty development; research; curriculum; campus climate transformation; and fundraising.

Using both numeric outcomes and total quality improvement assessment methods, the Plan 2008: Phase I Report captures the five-year trend of race/ethnic diversity initiatives across the institution.

UW System understands these are times of few resources and tight timetables. To assist institutions in their data gathering and reporting process, UW System will provide the following staff for guidance and consultation to institutions:

UW System Staff Resources To Campuses

UW System Staff Member	Area of Assistance	Phone/e-mail
Gail Bergman	OPAR Data	(608) 262-6718 gbergman@uwsa.edu
Scott Hamilton	Employment Data and Issues	(608) 263-4391 shamilton@uwsa.edu
Bharati (Maya) Holtzman	Report Requirements	(608) 263-1585 mholtzman@uwsa.edu
Tess Arenas and Marilyn Rhodes	Policy and Legal Concerns	(608) 262-8636 tarenas@uwsa.edu (608) 262-2275 mrhodes@uwsa.edu
Greg Ware	Precollege Participation Data	(414) 227-3111 gtware@uwm.edu
Kelly Williams	Precollege Assessment Resources	(608) 265-6776 kwilliams@uwsa.edu

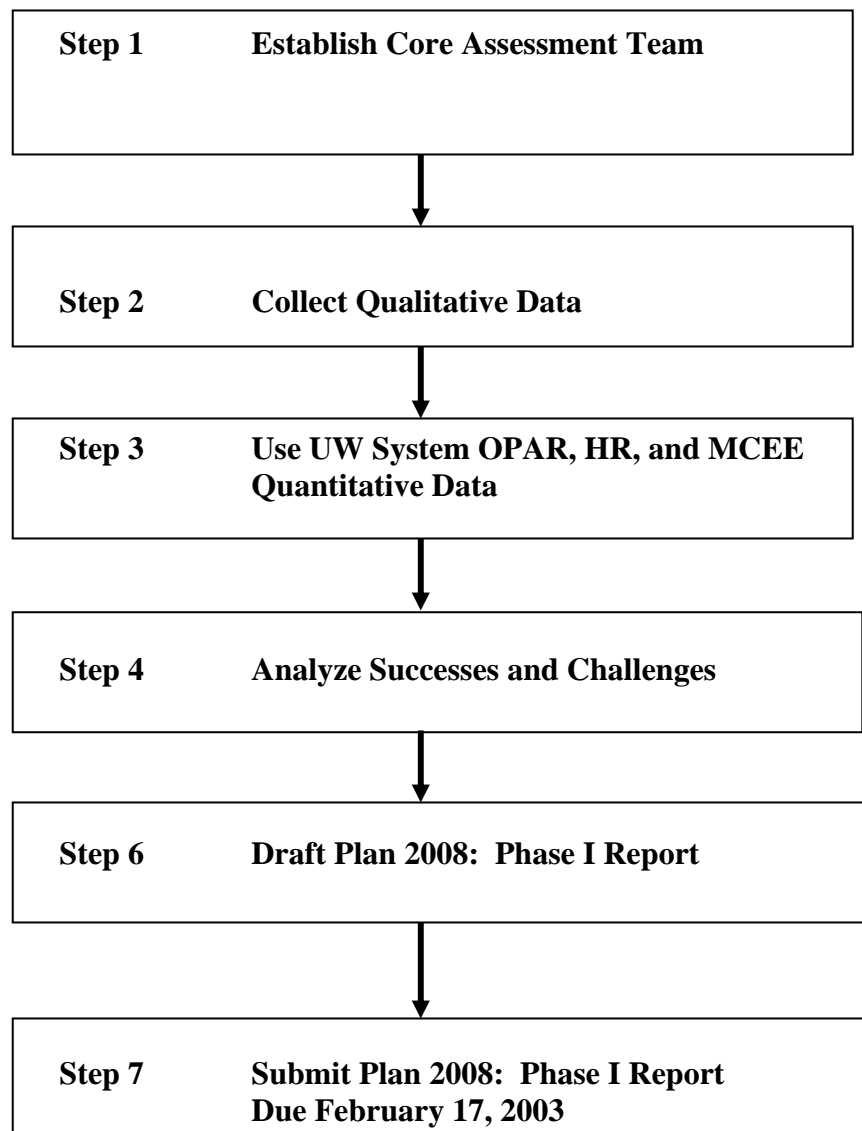
Plan 2008: Phase I Report Process

As a first step, institution's teams or committees review each of their initiatives for each of the 7 goals of Plan 2008. These initiatives are the items to be reported in the Plan 2008: Phase I Report. Appendix A provides questions that may be of value as you begin your reporting process.

Given the multiple layers in which your institutional Plan 2008: Phase I Report addresses race/ethnic diversity, active participation by multiple levels of the institution will be pivotal. This multiple layered assessment approach will hopefully promote a campus-wide appreciation of the successes and challenges of the last five year's efforts.

Figure 2

Institutional Plan 2008: Phase I Report Process



Plan 2008: Phase I Report Structure

Plan 2008: Phase I Report will serve as a feedback mechanism and a data source to inform the development of Plan 2008: Phase II (2003-2008).

The UW System Office of Academic Diversity and Development (OADD) recognizes the need for flexibility in the reviewing and reporting on their Plan 2008: Phase I Report implementation activities given the diverse missions and structures among UW System institutions. Appendix B provides a model for the report structure. While institutions may choose to use the provided format or modify it to meet particular institutional characteristics and needs, a relatively standardized reporting format will enable UW System and the institutions to make meaningful inter-institutional comparisons, identify and share information on institutional "best practices," and measure institutional progress towards Plan 2008 goals.

Reporting Formats

Institutions may use a similar reporting format as the one you used for the October 2001 Plan 2008 Biennial Report. In addition, please note the following Phase I Report guidelines:

1. Each report must contain an Executive Summary.
2. Reports should not exceed 50 pages, including appendices.
3. Reports should include 1-inch margins and be typed in a 12-point font.
4. Institutions may submit a reasonable number of brochures, videos, or other printed materials.
5. Reports must be submitted in hard copy (**7 copies**).
6. Reports must also be submitted on a floppy disk or as an e-mail attachment.

Appendix A

Suggestions for Developing a Strategic Assessment Plan

Questions You May Consider:

- Will there be a Plan 2008: Phase I Report review and reporting committee?
- Who will be involved and how will they be selected?
- What will the senior management's leadership and involvement be?
- What education and preparation will the assessment and steering committee need?
- What success indicators will let you know the program goals and objectives have been achieved?
- What type of review or assessment methods will be used?
- What type of data/information analysis will be used?
- How will feedback on Institutional *Plan 200: Phase I Report* progress and outcomes be disseminated on campus?

Appendix B

Suggested Plan 2008: Phase I Report Format

EXAMPLE

NAME OF INSTITUTION	
<i>Plan 2008: GOAL I:</i> INCREASE THE NUMBER OF WISCONSIN HIGH SCHOOL GRADUATE OF COLOR WHO APPLY, ARE ACCEPTED, AND ENROLL AT UW INSTITUTIONS	
RELATED INSTITUTIONAL <i>Plan 2008</i> GOAL:	
Priority Rank (1) (2) (3) (4) (5) (6) (7)	
INITIATIVE/PROGRAM	
(New)	
(Continuing)	
(Amended)	
NAME OF DEPARTMENT AND NAMES OF PARTNERS	
TARGET GROUP	

NAME OF INSTITUTION	
<i>Plan 2008: GOAL I:</i> INCREASE THE NUMBER OF WISCONSIN HIGH SCHOOL GRADUATE OF COLOR WHO APPLY, ARE ACCEPTED, AND ENROLL AT UW INSTITUTIONS	
NUMBER OF APPLICANTS AND TOTAL SERVED	
TIMELINE	
DURATION OF PROGRAM	
PROGRAM COST AND FUNDING SOURCES (external and internal)	
EXPECTED OUTCOMES OR NEED FOR INITIATIVE/PROGRAM	
ACTUAL OUTCOMES OR EFFECTIVES OF IMPLEMENTATION ACTIVITIES	
FACTORS INFLUENCING PROGRAM OUTCOMES <ul style="list-style-type: none"> • INTERNAL FACTORS • EXTERNAL FACTORS 	

NAME OF INSTITUTION	
<i>Plan 2008: GOAL I:</i> INCREASE THE NUMBER OF WISCONSIN HIGH SCHOOL GRADUATE OF COLOR WHO APPLY, ARE ACCEPTED, AND ENROLL AT UW INSTITUTIONS	
NEXT FIVE YEARS, WILL YOU DO THINGS DIFFERENTLY, IF SO: WHAT: WHY:	

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