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Strategic Planning for Internationalization in Higher Education

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INTRODUCTION

Strategic planning became popular in U.S. higher education relatively recently and is now a standard feature of college and university administration. Every new president embarks on a strategic plan, and with the trend toward shorter presidential terms, college and universities are undergoing the process more often. Further, with internationalization increasingly an important feature of higher education, senior international officers (SIOs) must be knowledgeable about strategic planning, both to help with this aspect of institutional strategic planning, and to be able to lead, monitor, and report on strategic planning for internationalization more discretely. Indeed, informal surveys conducted by the authors of this paper at meetings of international educators show that most in the room are or have been involved in at least one strategic planning process, and a recent AIEA survey indicated that strategic planning is a topic of high interest to members.

The vast literature on strategic planning cannot be captured in this paper. Instead we provide an overview of the process, share the collective wisdom and challenges of experienced international educators who have successfully engaged in the process, and provide case studies of strategic planning from three U.S. institutions of higher education. While strategic planning in U.S. higher education is the focus, the discussion should also be instructive for SIOs outside the U.S.

First, we begin with a discussion of strategic planning in higher education.

STRATEGIC PLANNING IN HIGHER EDUCATION: OVERVIEW

Strategic planning originated in the military as a top down process in which superiors devised a plan for complex military operations to be executed by the troops. In the Mad Men era of the 1950's, strategic planning became popular in the corporate world, evolving over time from the strict hierarchical military model to a wide range of models, many less hierarchical.

Planning became a necessary component of higher-education administration after World War II, due to the rapid expansion and growth of federal policies regarding access to, and financial support of, higher education. Throughout the 1960s long-range planning focused on the university budget became popular. In the late 1970s and 1980s the narrow focus on budgetary matters began to seem inadequate for the increasing complexity of higher education. Strategic planning became the new model for planning both in the business world and in



higher education, because it could capture more multi-faceted aspects of planning. Some colleges and universities established institutional research and planning units to assess an institution's opportunities and potential threats by scanning regional, national, and global external environments. Today some of those planning units provide support for strategic planning for internationalization, while some institutions locate responsibility for such planning in the international office.

Within the context of higher education, a strategic plan is ideally developed through an inclusive, collective process through which the participants develop a mission and a set of priorities to move the college or university toward an aspirational, but attainable, future state over a period of five or more years. Ideally, a strategic plan brings all stakeholders together to work toward common goals, in the process improving their understanding of the institution's mission and vision while fostering a sense of ownership and belonging. A good strategic plan outlines clear, measurable steps to attain desired outcomes, but is not a rigid document. Rather, through periodic assessment of the progress made toward the goals identified in the plan, the plan is adjusted to meet unforeseen circumstances and new opportunities, thus remaining fresh and relevant throughout its tenure.

The nature of higher education requires that the corporate strategic planning model be adapted to be effective. Perhaps most important, the shared governance concept on which colleges and universities operate requires that any process be based on a consensus that includes significant and visible leadership as well as input from the faculty. Corporations have a bottom-line orientation, whereas institutions of higher education tend to be more oriented around consensus. Colleges and universities serve more audiences than the typical corporation, which generally has a well-defined target customer. Colleges and universities are also famously decentralized; developing and implementing a plan, therefore, can be more challenging and time consuming than in the corporate world, where there is more acceptance of hierarchical decision-making. Finally, colleges and universities typically operate on a longer time horizon, planning for five or more years, whereas the typical corporation plans for two to three years so that it can adapt quickly to challenges from competitors.

Before embarking on a strategic planning process, several threshold questions need to be considered. First, is there leadership for the planning process? Strategic planning will not be successful without visible support from senior leaders, including the institution's president and its senior academic leader. Second, is the timing right for success? Strategic planning must be undertaken when the organization is in a period of stability. It is not crisis planning. Third,



what is the right scope for the plan? Is the plan for an entire institution, a school, or an administrative unit? Often individual units embark on a strategic planning process as part of an institution-wide effort, which requires that the unit find common ground with the larger institution while still accomplishing the goals that resonate with its specific work brief. At other times, units take on strategic planning independently – but still related to the institutional mission and its priorities.

Composing a team to develop the plan is critically important. Obvious participants are faculty, staff, and students – all primary stakeholders in the college or university. External stakeholders – alumni, trustees, and industry experts depending on institutional type – can offer fresh perspectives. Indeed, multiple perspectives are essential to a successful process.

STAGES OF STRATEGIC PLANNING

Strategic planning typically progresses in a series of defined stages:

- Define the organizational mission. The mission is a short statement that describes a college or university's philosophy and purpose, often in aspirational terms. Mission statements are typically one to two sentences, but may be expanded by a vision statement, a few paragraphs that elaborate on the mission. The first step in a strategic planning process is either creating a mission statement or reviewing and possibly updating an existing mission statement.
- Acquire and analyze data. It is critically important that a strategic plan be based on the best data available. Too many committees rely on focus groups or large meetings where people put forth ideas informally. Such input will be far more productive, however, if informed by data from surveys and other sources. At a minimum the committee must understand the institutional history as well as the current environment in which the institution operates. It should undertake an analysis of the institution's unique attributes, areas that need improvement, how it compares to its peers and aspirational peers, stakeholders opinions, and potential roadblocks as well as opportunities. The SWOT model (Strengths, Weaknesses, Opportunities and Threats) is one of many analytical tools that can be used by the committee for this type of analysis. Knowing the institutional culture and the values that are essential to its identity is critical. If this stage is not undertaken seriously, the planning is less likely to result in a fresh direction for the institution, missing potential opportunities for innovation and



distinction.

- Set Strategic Priorities. At this stage, the committee identifies 3-5 major priorities that have emerged from the data and analysis it conducted. Strategic priorities are broad goals that will move the institution toward the fulfillment of its mission and vision. The priorities are accomplished through concrete action plans defining the specific steps that must be accomplished over the life of the plan. Action steps should be SMART: Specific, Measurable, Agreed-upon, Realistic and Time-bound.
- Assess and measure progress. A critical step in every strategic plan is to determine the standards by which success will be measured. As strategic plans should be living documents, they need to be fine-tuned and adjusted at least annually by applying the assessment methods to determine what has been accomplished, identify obstacles blocking progress, and consider emerging opportunities that warrant an adjustment in the plan.

Every process has its challenges. Anticipating them can help avoid them. Additionally, leaving room in the process to incorporate new ideas and input can pay dividends in the long run. Finally, no plan will succeed if relegated to a shelf. Implementation and adjustment, as needed, are thus key.

TWELVE PRINCIPLES OF SUCCESSFUL STRATEGIC PLANNING FOR CAMPUS INTERNATIONALIZATION

In establishing a strategic planning process for your institution for campus internationalization, it is useful to keep the following principles in the foreground to help ensure an effective and ultimately successful result.

Principle 1: Educate about internationalization. Do not assume your colleagues and campus understand what constitutes the internationalization of higher education, nor what this means specifically at your institution. Make sure they understand concepts as well as practices at both your and similar institutions. An inventory of existing international initiatives, benchmarking to peers and aspirational peers, and results of surveys to solicit international priorities from senior leadership, faculty, staff, and students can help guide the work of those who will be charged with developing a strategic plan for campus internationalization.



Principle 2: Solicit wide input. Most often, a committee (and sub-committees, depending on an institution’s size) will be tasked with conducting strategic planning for internationalization. Often led by a SIO as well as a faculty leader, such committees generally include representatives from all segments of the campus community: faculty, staff, and students. The effectiveness of the committee(s), will rest on buy-in from the wider campus community. Surveys, focus groups, and meetings with key groups of stakeholders should inform the committee’s work and help community members feel their voices are being heard, including those perceived as “difficult”. Enlisting the broader campus in strategic planning will encourage ownership of internationalization.

Principle 3: Share leadership. The SIO will play a critical role in the strategic planning process; after all, an effective SIO will be the most knowledgeable individual on the campus regarding comprehensive internationalization in general, and the specifics of the institution’s internationalization more particularly. Indeed, it may make sense for the SIO to draft the charge to the strategic planning committee for internationalization. However, for strategic planning to result in shared ownership of internationalization, it is important that the SIO’s role be understood as helping to facilitate the process, and ultimately, implementation of the plan, but not as being sole owner and leader. It will therefore make sense for the institution’s chief academic officer (provost/dean/vice president) to appoint a well-respected faculty member to co-lead the planning committee with the SIO, and for the provost to issue the official committee charge.

Principle 4: Establish a timeline. The timeline for the strategic planning process should allow for maximum deliberation, lead toward viable recommendations, and maintain momentum. From this perspective, the committee’s first meeting will be critical, as tasks, responsibilities, and deadlines are identified. Tight deadlines will help ensure that committee members (including any sub-committees) stay on task. The SIO can play important roles by providing background data, responding to questions, offering clarifications where necessary, and making suggestions that can move the process forward efficiently and productively.

Principle 5: Seek transparency. Within the academy, transparency is usually the better policy. Thus, regular communication is key, preferably with multiple audiences and in campus fora, in writing and face-to-face. Feedback received should be incorporated into draft documents to the extent possible to ensure that stakeholders feel they are being heard. In the final analysis, the recommendations to emerge from the strategic planning process must represent the will of the campus community.



Principle 6: Focus on the curriculum and student learning. The curriculum is at the heart of comprehensive internationalization because it drives student learning. Unfortunately, this aspect of internationalization is not well understood in the academy: The frequent identification of internationalization with international student enrollments, university partnerships, study abroad enrollments, and other quantifiable measures frequently obscures the vital role of the curriculum. Yet, student learning and preparation for participation in an interconnected world is what is ultimately at stake in comprehensive internationalization, and central to this learning and development is the curriculum. Curricular recommendations, therefore, must be a strong focus in strategic planning for internationalization, and this needs to be recognized as one of a SIO's responsibilities. Significant faculty input and communication about recommendations will be critical to ensuring faculty ownership and positive impacts on students.

Principle 7: Look for opportunities for cost-neutral, significant change. The cost of internationalizing the curriculum is generally little understood, and in a financially challenging environment, faculty may doubt that the curriculum can be internationalized without a substantial infusion of additional resources. Yet, meaningful, cost-neutral changes are possible. For example, the tenure and promotion system can be modified to reward faculty for their contributions to internationalizing the curriculum. This adds no costs, but provides an incentive. Similarly, majors can be structured to allow for participation in study abroad without delaying progress toward the degree. This requires no expenditure, but aligns internationalization goals with the practical realities faced by students. Additionally, partnering with campus units (departments, the teaching and learning center) and other campus initiatives can take advantage of existing resources and create synergies.

Principle 8: Ensure that internationalization touches all students. Internationalization should touch all students through the curriculum and co-curriculum. Rather than relying on one element, such as general education, look to all sites for learning: general education, the disciplines, and the co-curriculum. Offer students multiple, intentional encounters with international content, hands-on application, and synthesis that will help them become more informed and effective participants in local and global society. Because faculty have control of the curriculum and student affairs plays a critical role, make sure recommendations about the curriculum – and co-curriculum – are reviewed and adopted by the appropriate institutional pathways (curriculum committees, the academic senate) and embraced by student affairs. Broad-based faculty and staff participation in developing priorities and recommendations will, in all likelihood, lead to active endorsement.



Principle 9: Implement. Strategic planning is pointless without implementation. Indeed, it comes to life in the implementation, monitoring, and adjustment stages. Implementation should start with what is easy – the low-hanging fruit – to gather momentum, and then proceed to more difficult tasks. An effective way to implement a plan is to require that the strategic plan form the basis for annual work plans of those reporting to the SIO.

Principle 10: Monitor and assess. Was the planning worth it? Only if progress is monitored and assessed. Monitoring and assessment therefore are integral to the planning process. How will we know if we are achieving our goals? What will we do if not? And what are our options if circumstances and conditions change? Monitoring and assessment will establish the degree to which the recommendations have been implemented, and the degree to which the intended outcomes have been realized. Both numbers (increased international student enrollments) and outcomes (greater comfort dealing with difference) will need to be written into the plan as well as methods and timetables for monitoring and assessing at multiple levels (department, program, institution).

Principle 11: Disseminate. The internationalization of higher education needs to be a shared enterprise, undertaken and supported by stakeholders across institutions. Strategic plans for internationalization therefore need to be disseminated across stakeholders, as do achievements, gaps, and next steps. Posting plans to websites avoids printing and mailing costs; announcements about the posting can be made to the campus and key stakeholders electronically. Plans can also be disseminated in meetings with institutional leaders, in faculty fora, and through presentations and other dissemination modes to academic advisory boards and trustees, particular campus units, and so on.

Principle 12: Do not wait for senior leadership to change to plan for internationalization. Rather, internationalization will be more successful if stock and action are taken continuously to advance and improve internationalization. Using existing processes (data collection and analysis for annual reports, self-studies and external reviews) will help ensure that when senior leadership does change, strategic planning for internationalization will go more smoothly.



CASE STUDIES

The following case studies of strategic planning processes at two large public universities and a small, private liberal arts college demonstrate how the principles discussed can be put into action. They also show that strategic planning must be tailored to the missions, cultures, and resources of institutions.

When creating its second strategic plan for internationalization, the University of Kentucky was able to benefit from earlier planning to identify targets for investment and early stage research. Over 100 people were involved in an efficient process involving shared leadership, broad inclusion, collaborative input and transparency. Implementation involved investing modest dollars tied to goals and is a good example of strategic planning that supports progress in a time of fiscal constraints.

At Rutgers University, strategic planning for internationalization coincided with the establishment of its Centers for Global Initiatives and International Affairs (GAIA). While university-wide strategic planning would not take place until a new president was appointed two years later, strategic planning for internationalization put GAIA in the position of being a helpful resource, especially for deans attempting to incorporate global elements into their own strategic plans. GAIA's process educated the university community on the importance of global engagement. It succeeded by seeking broad community input, disseminating research results, and working within a tight timeline.

Beloit College, a small, liberal arts college, used strategic planning to shift from a focus on study abroad and international student enrollment to internationalization of the curriculum and faculty involvement in internationalization. Beloit's goal is to ensure that internationalization touches all students. Highlighting the impact of internationalization on student learning and investing in faculty development ultimately strengthened the institution's commitment to international engagement



The University of Kentucky
Susan Carvalho, Associate Provost for Internationalization

The University of Kentucky (UK) completed an internationalization review and 5-year strategic plan in 2009, under the guidance of the American Council on Education’s internationalization laboratory. The 2009 plan laid out goals and metrics for improvements across all areas of internationalization, essentially focusing on ramping up the university infrastructure to pursue growth in global research, student mobility, and curriculum. Five years later, the UK International Center (UKIC) was in a stable position, and building the infrastructure was no longer the main focus. Rather than update the broadly conceived 2009 plan, UK undertook a “Strategic Plan 2.0,” the goal of which was not to broaden the International Center’s capacity further, but rather to lead a campus conversation about strategic choices for areas of global investment by the university’s colleges and central administration.

As with all of higher education, UK’s economic and political context had changed a great deal in those five years, due to both internal and external factors. In the 2014 environment, any plan that advocated for new resources would have to propose how those resources would be generated in order to be taken seriously. The 2.0 Plan therefore needed to look at data—particularly related to internal and external resources—in order to make strategic choices and to prioritize some global initiatives over others in identifying areas for investment. The operant administrative philosophy was that if everything was articulated as a priority, then there really were no priorities. Highlighting some initiatives and regions over others would certainly create difficult campus conversations; a solid planning process was critical. When people don’t like an outcome, they will often criticize the process rather than attack the outcome directly. With this in mind, the UKIC took a great deal of care in designing a transparent and collaborative process that was thoroughly vetted by the faculty-led International Advisory Council as well as by university leadership before it was launched.

UKIC identified seven geographic regions for analysis. Due to broad campus interests, China comprised its own region. The others were Latin America, Sub-Saharan Africa, Middle East/North Africa, Asia-beyond-China, Russia/Caucasus/Central Asia, and Europe/Australia/New Zealand.

The UKIC then formed seven committees, comprised of faculty members with expertise in the regions who were nominated by their deans. Membership was carefully managed so as to include a range of colleges, disciplines, and types of initiatives. UKIC staff also served on each of the seven committees. In all, this planning initiative involved nearly 100 faculty and staff members from UK’s



sixteen academic colleges. The seven committee chairs constituted the Executive Committee.

Throughout the spring semester of 2014, each committee was asked to meet two to four times to address the following questions:

1. **Asset Mapping:** What does UK already have established in this region? What UK strengths can be brought to the table that matter to this region? What themes emerge?
2. **Opportunity Mapping:** What are the US priorities in this region, and how do they align with potential sources of external support? What other sources of collaborative funding might be leveraged for this region (in-country partners, public/private partnerships, etc.)?
3. What UK needs can be met through partnerships in this region (curriculum, student recruitment, education abroad, strategic faculty hiring, research/engagement, global health, other)?
4. Based on the above, if UK's activity in the region is to be enhanced, what would best leverage both UK's strengths and external opportunities? Would this be a core institutional partner, regional or thematic on-campus working groups, an office in the region, strategy in Washington D.C., other?
5. What is the committee's bold vision for a fully developed UK focus in the region?

Based on the seven reports, it became clear which regions would be identified as Tier One (significant UK strength, student need, external opportunities) and Tier Two (need to develop further expertise or find core institutional partners to stabilize UK's work), and which would be held in "strategic latency" for a future phase of investment.

One outcome of the conversations was a shared realization of the need for strong institutional partners within each region. UKIC turned to internationalization literature to articulate the criteria for identifying a "core institutional partner": institutional alignment, sustainability and reciprocity, potential outcomes related to student mobility and/or faculty engagement, and a strategic geographic location.

Once the faculty and staff had agreed on those criteria, it was unproblematic to identify nine institutions that became UK's "key institutional partners," across most of the seven regions. These were institutions where relationships had been



ongoing for several years, where multiple visits had taken place in both directions, and where multiple disciplinary partnerships could take place under a single umbrella. The partner institutions were proud to have been selected as one of the very few universities in their regions, and this in turn raised UK's standing on their campuses. In regions where UK was not able to identify a key institutional partner, a plan was made to build such relationships for the future.

After the nine key partners were identified, UKIC set aside a small pool of funds to enable multiple faculty members to visit them during the coming years. In order to control costs, the funds were made available only to faculty who would already be working in that general vicinity on department, college, or grant funds; UKIC offered the additional margin costs, to extend the travel by 2-3 days to allow a detour to explore shared interests with the partner institution.

In addition to the list of key partners, the process also produced an identification of particular themes (e.g. global health, nutrition, food security, higher education capacity-building) and regions (e.g. China, Sub-Saharan Africa, Latin America) that would stand as institutional priorities for investment. As stated in UKIC's strategic mapping report:

Providing institutional direction is essential for the university to achieve its strategic objectives for internationalization. By identifying our strategic priorities and the steps to achieve them, UK will be able to marshal its resources effectively, align and coordinate the work of its colleges and administrative offices—many of which have important global aspirations of their own—and assure that internationalization efforts advance the university's strategic goals for 2014-2020.

It was important to stress that the identification of these priorities was not intended to exclude other activity that was important to students, faculty, or colleges. Rather, the priorities would guide the investment of any future “new dollars”, and provide advice to deans regarding areas where the return on investment—in terms of both student opportunities and funding—would be strongest.

The 2009 plan had advocated for broad investment but had not identified the sources for those funds. The reasons were twofold: 1) the UKIC was indeed underdeveloped for meeting the institution's goals, and 2) many budgets were centrally controlled, leading to a need for each campus unit to advocate for its own support by requesting funds from the central administration. In contrast, the 2014 plan did not propose a further reallocation of scarce central funds toward the UKIC. Rather, it identified current and potential activities that



harnessed existing institutional strengths to sources of new revenue, and demonstrated that if those new revenues were invested in internationalization, the investment would yield sustainable growth. Those sources of new revenue included external grants focused on global partnerships or capacity-building; new tuition dollars from international students or out-of-state domestic students; and partnerships with international governments or ministries.

The final report was well received by senior administration, college deans, faculty, and students. It impacted many campus conversations, and is leading to the establishment of regional and thematic working groups across the campus. In an environment of scarce resources, the focus on initiatives that can “earn their own way forward” was felt to be the most appropriate way that UK could best create a sustainable and solid foundation for the next phase of growth in internationalization.

Rutgers University

Joanna Regulska, Vice President, International and Global Affairs

Established in 1766, Rutgers University is a comprehensive land-grant research university and the eighth-oldest university in the United States with a long commitment to excellence in international higher education. A member of several institutional organizations [f. ex. the American Association of Universities (AAU) and the Committee on Institutional Cooperation (CIC)]—Rutgers is one of only eight universities in the United States that offers humanities, social sciences, and business alongside medicine, pharmacy, agriculture, and engineering. Over 65,000 students are enrolled across its 33 schools in New Brunswick, Camden, and Newark. Nearly 10 percent of those students are international, hailing from 125 countries across the world, and over 1,000 international scholars visit the university each year to collaborate with Rutgers faculty and students. Engaging the university community in international experiences doesn’t end there; Rutgers offers its students 172 study abroad programs in over 60 countries.

Rutgers established the Centers for Global Advancement and International Affairs (GAIA Centers) in 2011 to develop a comprehensive, university-wide set of international initiatives and services; facilitate international collaborative research projects and strategic partnerships; and expand students' opportunities for international study and research. These tasks are accomplished through four pillars: global education, global programs, global relations, and global services.

In February 2014, under the leadership of Rutgers President Robert L. Barchi, the university debuted its first strategic plan in many years. The five-year plan featured priorities and initiatives for all Rutgers’ schools, units, departments,



and centers to incorporate into their own tactical activities. Although the university's strategic plan touched upon elements of Rutgers' international efforts, it did not explicitly highlight its international dimension—without which many of the plan's strategic priorities and integrating themes could not be accomplished. The GAIA Centers worked to create a strategic plan for the Centers that specifically outlined international priorities and initiatives and would serve as the go-to reference for integrating international goals into everyday operations across the university. The Centers also hoped this would help other Rutgers units to incorporate global initiatives into their strategic plans.

The revision of the GAIA Centers' mission and the establishment of strategic priorities relied partially on a three-part global “needs” inventory of the university's international engagement conducted by the GAIA Centers prior to writing the plan. This inventory included interviews with all 33 deans to determine internationalization priorities for their schools along with strengths and weaknesses that could inhibit reaching their goals. Every center and institute was surveyed electronically to determine the extent of its global activities and interest in expanding international engagement. The GAIA Centers also sought feedback from a select group of internationally involved faculty to learn more about their research and involvement across the world. The inventory gave the GAIA Centers insight on the units' priorities and challenges, and how to work most effectively with faculty, units, centers, and schools in developing a global agenda for the university.

As the inventory process predominantly collected feedback from the deans' perspective, and to a lesser degree from faculty, the GAIA Centers issued an open solicitation to the entire university community inviting creative ideas to promote internationalization. An Ad Hoc Subcommittee of the International Advisory Committee (IAC) – a university committee comprised of representatives from all schools – was charged with reviewing and ranking the proposals that had emerged. A surprisingly robust response provided some excellent ideas that had not previously been highlighted in the GAIA Centers' planning process. For example, there were multiple proposals on how to stimulate and improve language study that spurred the GAIA Centers to think more deeply about this issue and develop new initiatives. These ideas were included in the GAIA Centers' plan and ultimately into the Rutgers University – New Brunswick strategic plan.

The GAIA Center's senior staff and staff of each of its pillars used the University Strategic Plan framework and the information it gathered to create a draft of the strategic plan with strategic priorities that would be feasible—and meaningful—across the university. To maintain its relevance in a process that



did not include global initiatives explicitly, the GAIA Centers developed strategic priorities that reflected “international” without deviating from the university’s original strategic priorities. For example, the university strategic priority “Transform the Student Experience” became “Internationalize the Rutgers Student Experience” in the GAIA Centers strategic plan.

The GAIA Centers’ draft that emerged from discussions and community input was presented at the meeting of the full IAC. To stimulate more interaction between its pillars in accomplishing the goals of the strategic plan, the GAIA annual staff retreat concentrated on strategic planning. Each GAIA pillar (education, programs, relations and services) focused on one aspect of the draft strategic plan and identified ways where they could work alongside other pillars more effectively to address it. The retreat culminated GAIA’s staff work on the strategic plan. The final draft featured five strategic priorities and an average of four initiatives under each priority. In August 2014, the GAIA Centers’ five-year strategic plan was distributed to the university’s academic leadership and GAIA staff. The GAIA Centers staff drafted the pillar and individual work plans for the upcoming year using the strategic plan as a road map.

The GAIA Centers intentionally completed and disseminated its strategic plan while the four academic units comprising the Rutgers system were still engaged in developing their own plans under the University master plan. The goal was to encouraging the units to consider incorporating more global elements into their plans. The strategy proved successful and resulted in the Rutgers University–New Brunswick planning team working closely with the GAIA Centers to develop their own plan, a plan with a significant global thread running throughout it (<http://nbstratplan.rutgers.edu>). Another newly formed academic unit of the university, Rutgers Biomedical and Health Sciences, emphasized global health as one of its focus areas (<http://rbhs-stratplan.rutgers.edu>).

The strategic plan will be revisited on a yearly basis in order to ensure that it responds effectively to changing priorities and circumstances. Hard copies of the plan are available upon request.

Beloit College: Strategic Planning for Internationalization at a Small College

Elizabeth Brewer, Director, International Education

Since near its founding, Beloit College, a liberal arts institution of 1,250 students in southern Wisconsin, has engaged internationally. Founded in 1846, only a short-time later the college was both enrolling foreign-born students and its alumni were serving as missionaries abroad, returning to campus to share



their insights into the countries and peoples with whom they worked. In 1924, George Collie, as the college dean, announced a radical plan to increase international student enrollments to 60% of the student body; the aim was to solve the world's "racial problems" (Collie, 1924). Although this did not occur because of trepidations among senior leadership and financial constraints, in 1930, Beloit College's Board of Trustees authorized use of tuition to support study abroad for one member of the junior class. Internationalization really began, however, when a curricular reform established a World Affairs Center in 1960, intended to "bring the world to Beloit College" through increased international student enrollments, the infusion of international content into the curriculum, and support for more study abroad, including through faculty-led, "world outlook" seminars (Beloit College, 1960). Today, roughly 10% of Beloit students come from abroad, and 45% study abroad for one or more semesters. Why?

As described in the introduction to this occasional paper, strategic planning is often associated with changes in leadership. A new president or chief academic officer arrives at an institution, and both is expected to, and desires, if not feels obliged, to make changes that will strengthen the institution and enhance its standing. Hopefully, and this has been the case at Beloit College, the new vision articulated by the senior leadership will also build on traditions and existing strengths and take advantage of opportunities made possible, for example, by new faculty hires. As importantly, however, as seen in this case study, strategic planning will result in habits and practices of on-going assessment, visioning, and planning, to enable an institution to remain true to its core mission and history while adapting to a host of changing conditions, opportunities and constraints.

Between 1960 and 1999, Beloit College's internationalization evolved. International student recruitment became institutionalized as a function of the admissions office, as opposed to alumni serving as the chief source. Faculty-led seminars were gradually replaced by direct enrollment options (both on an exchange and visiting student basis); direct enrollment better accommodated a wide range of majors, was more cost efficient for both students and the college, and was less burdensome for faculty (and their families). Instruction from beginning to advanced levels was offered in six languages, and though not required to, many language majors studied abroad, as did students in signature fields such as anthropology and international relations. However, a new dean helped the college reexamine the purpose of the college's international education program. Over 55% of students had international experience via study abroad or by dint of coming from abroad. For what purposes? What was being achieved through student mobility? And what kind of international education were the 45% of students receiving who were not moving across



national borders while at Beloit? What was the role of the faculty? What was happening in the curriculum?

In 2001, under a new president, a strategic plan for Beloit College called for international student enrollment to increase from 10% to 12%, and for study abroad participation to rise from 45% to 60% of students. The plan did not identify how and why these increases would take place. It fell to the dean of the college to initiate series of steps would address these questions.

First, campus conversations in the form of all-faculty conferences held over three consecutive years helped the campus inventory current activity, identify obstacles and opportunities, and wrestle with definitions and priorities. In relatively short order, these led to the establishment of a mission statement for international education, learning goals for study abroad, and an international symposium to disseminate learning from study abroad to the broader campus.

Second, conversations with other institutions and with international education organizations enabled Beloit College to look at models of internationalization, experiment with tools to maximize learning from international experience (for example, through pre- and post-study abroad supports), and expand the mandate of the international office and its oversight committee to encompass campus internationalization. The primary partners for these discussions were the American Council on Education's Internationalization Collaborative, the Association of the Colleges of the Midwest (ACM), Global Partners (a joint project of the ACM, the Great Lakes Colleges Association, and the Association of Southern Colleges), NAFSA, and the Association of American Colleges and Universities (AAC&U).

Third, four years after the strategic plan was announced, a self-study and external review of international education at Beloit College collected and analyzed extensive data through faculty/staff and student surveys, interviews with key staff members, and asset mapping. Major findings indicated that international education was widely valued, but active support/engagement varied considerably across campus units and faculty and staff; that study abroad was considered the strongest component, although its outcomes were not widely understood; that exchange partnerships were underdeveloped; and that international student enrollments were declining in the face of increased competition. As well, financial resources for internationalization were thin. (The self-study and external review that took place seven years later built on the foundation of the earlier ones, but had a narrower focus in keeping with shifts in the college's accreditation processes. The priorities discussed below remain current, however.)



NEXT STEPS: PRIORITIES AND ACTIONS

Based on the activities described above, five priorities were set to support a transition from a focus on student mobility to campus internationalization. While student mobility (study abroad and international student enrollments) would remain central to Beloit's international education program, going forward, international education would need to touch all students. Campus internationalization was therefore necessary. The priorities and action:

- 1) Build faculty capacity - to add international content to the curriculum, prepare students for study abroad and build on their experiences post-study abroad, and integrate international students and their perspectives into teaching and learning. Methods: Workshops, seminars, curricular initiatives, and travel abroad;
- 2) Integrate study abroad into campus teaching and learning – so that study abroad is part of students' educational trajectories and preparation for life after college. Methods: Identify study abroad opportunities for every major, use the application process to help students set their own goals for study abroad, offer opportunities post-study abroad for meaning-making and connecting to next steps (digital story-telling course, study abroad ambassadors), and experiment with curricular “interventions” during study abroad in order to increase students engagement with study abroad sites;
- 3) Develop ways to both increase international student enrollments and ensure international students' success – so that international students feel they are both an integral part of the student body and can contribute to the campus. Methods: Improve messaging and outreach to prospective international students, join other liberal arts colleges in recruitment travel, develop new exchange partnerships, fine-tune scholarships and other kinds of financial aid, and provide strong supports for international students (ESL, orientation, advising, host family and other programs);
- 4) Make internationalization visible - to create a culture of internationalization. Methods: Presentations in faculty fora highlighting international initiatives, articles in the college magazine, the annual international symposium, student profiles on websites, an annual report posted



to a website and annual campus briefings, signature campus programs (such as in human rights), international colloquia and conferences held on campus; and

5) Use and develop resources wisely to support internationalization – to make sure that internationalization is both sustainable and can evolve as new opportunities and challenges arise. Methods: Find synergies with campus initiatives and resources, experiment with pilot programs to test the viability of larger initiatives, use results to engage donors and foundations, and decide what matters to mission, and what does not.

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The **Association of International Education Administrators (AIEA)**, a membership organization formed in November 1982, is composed of institutional leaders engaged in advancing the international dimensions of higher education. The purposes of the Association are to:

- Provide an effective voice on significant issues within international education at all levels,
- Improve and promote international education programming and administration within institutions of higher education,
- Establish and maintain a professional network among international education institutional leaders,
- Cooperate in appropriate ways with other national and international groups having similar interests.

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