Action Planning Worksheet

CIC 2026 Institute for Chief Academic Officers · Aligning Data, Strategy, and Financial Practices to Advance Student Success

Name: Institution:

Instructions: Use this worksheet to outline specific actions you can take in the next **2 hours, 2 weeks, and 2 months**. Start from the priority you traced on your Current State Worksheet or the collaboration opportunity from your Guided Scenario Worksheet.

STEP 1 Key takeaways

What are 1–3 insights or strategies from this workshop that you want to explore further or implement?

Insights or strategies

STEP 2 Focus your plan: connect a priority to a potential tool(s)

Priority Which strategy needs support?	**Implementation need** Data, process, resources, governance, or communication?	**Tool or resource** Which CIC or Hub tool helps?	**Next use** Who will use it, for what decision?
Example: Sustain a first-year advising pilot	*Cost and outcome evidence*	*IPEDS Peer Benchmarking Dashboards; Hub Financial Impact Analysis*	*IR and finance bring it to the spring budget cycle*

Make resource assumptions explicit and plan for barriers before they appear.

Barrier What could slow progress?	**Signal** How will we know it is happening?	**Response** What will we do if it appears?	**Response Owner**

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Steps 3–6 and Final Commitment

Step 3: Next 2 hours Immediate actions. What quick step can you take today to begin integrating student-centered financial strategies?	**Step 4: Next 2 weeks** Short-term actions. What achievable steps will build momentum for data-informed student success strategies?	**Step 5: Next 2 months** Mid-term actions. What steps will build institutional commitment and scale impact?
Examples: • Highlight key CIC and Hub resources from today's notes • Draft a message to your CBO and IR lead to start the conversation	**Examples:** • Meet with finance, IR, and student affairs to review outcomes and budget connections • Explore your institution in the CIC Insights Tool or IPEDS Peer Benchmarking Dashboards	**Examples:** • Establish or refresh a cross-functional group on student success • Draft a RACI for one priority and share progress with cabinet

STEP 6 Accountability and support

Who are your key champions and collaborators? How will you track progress and define success?

Examples: your CBO and vice president for student affairs; institutional research or effectiveness; tracking through dashboards, milestone check-ins, or biweekly planning meetings.

Champions and collaborators	How you will track progress	What success looks like in 2 months

FINAL COMMITMENT Center students in your financial strategies

What is one concrete commitment you will make today to help your institution center students in its financial strategies?

My commitment