Current State 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 assess how data, strategy, and financial practices are integrated into the planning and evaluation of student success initiatives at your institution. Work on your own institution first, then compare notes with peers at your table. Keep this worksheet; it feeds your action plan this afternoon.

Financial activities include, but are not limited to: resource planning that builds financial sustainability and scalability into academic and student-centered programs; joint review of budgets and student outcome data by finance, academic, and student success leaders; and assessing outcomes against resources invested (money, time, and expertise) to inform future investment decisions.

Current-State Alignment Scan

Choose one current student success priority and trace how it moves through a process on your campus.

Priority: _____

Handoff failures Where does the priority stall or get lost between offices?	**Data gaps** What evidence is missing, late, or disputed?	**Duplicated decisions** Where is the same decision made twice, or differently?	**Coordination opportunities** Where would one conversation save three?

Capture What Your Scan Revealed

LEVERAGE What are we currently doing well?

Initiatives, policies, or practices that positively affect students and build capacity for the financial sustainability and scalability of academic and student success efforts.

Factors to optimize or leverage	**Potential impact if optimized or leveraged**

Current State Worksheet

Capture What Your Scan Revealed

IMPROVE Where are we siloed?

Practices, structures, or outcomes that could be strengthened through stronger collaboration among finance, academic affairs, and student success professionals. Consider barriers that limit collaboration and efforts that are siloed rather than integrated.

Factors to improve	Potential impact if improved through actions, practices, or policy changes

ANTICIPATE What is outside our control?

External factors to consider in budget development and resource planning (economic trends, demographics, geography, operating costs, labor market shifts, policy changes). These are beyond your institution's control but essential to anticipate and prepare for.

Ecosystem factors to consider	Potential impact of these factors