

Get a Week's Worth of Strategic Planning Done in One Day

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The Society for College
and University Planning

KENT STATE.
UNIVERSITY

College of Education,
Health and Human
Services

AGENDA

- Context for planning (a bit about KSU)
- Elements of a super-productive retreat
- Facilitator training
- Treatment of participants
- Practicing activities
- Wrap-up, questions



LEARNING OUTCOMES

(PARTICIPANTS WILL BE ABLE TO...)

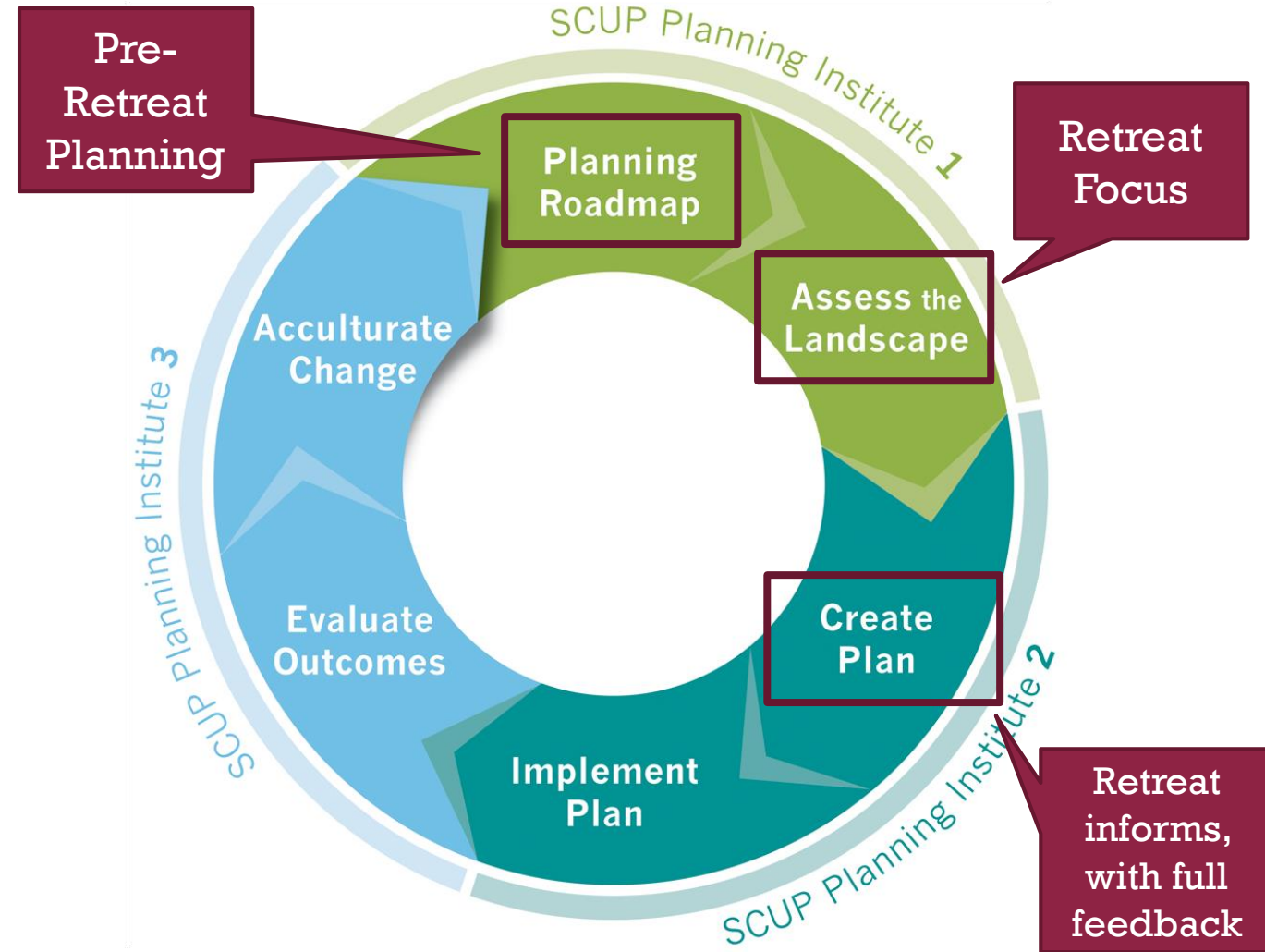
1. Outline the planning process for an inclusive, thoughtful, and engaging strategic planning retreat, including pre-retreat training and post-retreat follow-up.
2. Select and prepare retreat facilitators, including identifying reading assignments, interviewing stakeholders, and activity training.
3. Design a retreat experience for participants that prepares them for participation, maximizes their time, and ensures participation.
4. Use active participation strategies to drive elaboration and planning toward innovative and context-informed conclusions/goals.



BACKGROUND ON KSU/COLLEGE OF EHHS

- KSU – 8 campuses, ~39,000 students
- Strategic plan unveiled 2015; 5 priority areas
- Enrollment flat or declining (KSU/EHHS)
- College of EHHS has interim dean July 2015-2017
- Self-study and external review completed AY 17-18
- Strategic plan to be informed by 6 teams (aligned with KSU strategic plan)
- Major participant time constraints





SCUP INTEGRATED PLANNING MODEL

<https://www.scup.org/planning-type/integrated-planning/>



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THE TASK: STRATEGIC DIRECTIONS IN A DAY

- Planning teams to **identify specific directions** in which the college should move (aligned to KSU)
- Teams to be cross-functional and cross-discipline
- Pre-retreat preparation for ‘**once and done**’ approach, single-day in-person commitment
- Ensure transparency, openness, and creativity are paramount within the process at all stages
- Involve full college/stakeholders *after* retreat



CRITICAL RETREAT ELEMENTS

- Create positive atmosphere, collaborative spirit
- Structure activities to capitalize on creativity
- Provide breaks to avoid burnout
- Generate artifacts to remind participants of progress and serve as summary of work
- Keep energy high through varying the work
- Neutralize dominant behaviors and participants



PREPARATION OF FACILITATORS

- Considerations for facilitator selection (commitment)
- Facilitator reading assignments (focus, sources)
- Facilitator interview assignments
 - Where do you think things (in priority area) are headed at KSU in the next 5 years?
 - Does that match where they are headed nationally?
 - What are some significant challenges on the horizon? (EHHS?)
 - What are some opportunities on the horizon? (EHHS?)
 - Do you see any unique opportunities that EHHS could support or lead related to your area? (Essentially, “Help us help you.”)



FACILITATOR TRAINING

- Discussion of readings, interviews completed
- Overview of timeline (deep discussion to find flaws)
- Discussion of draft EHHS mission, vision, values, etc.
- Deep dive on planning documents, definitions
- Practice with ALL activities
- Review of retreat logistics
- Strategies for neutralizing dominating behaviors
- Discussion of post-retreat follow-up



PREPARATION & TREATMENT OF PARTICIPANTS

- The importance of the invitation
- Retreat pre-reads and other preparation
- Treating participants right (w/o breaking bank)
- Activities to maximize engagement and ensure participation (even from the introverts)
- Post-retreat follow-up (member-checking prior to opening feedback to college community)



Retreat Activities and Examples



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Guides
available
via email








RETREAT KICKOFF

- Dean's welcome, information items:
 - Planning completed prior to retreat (self-study, mission, facilitator training, etc.)
 - Strategic plan basics: span of plan, implementation timeline
 - Introduction of facilitators, team overview
 - Goals of retreat (recommending PSDs)
 - Post-retreat timeline, expectations



Introductions, Rules, Parking Lot, and Goals (9:15-9:45am)

• Facilitator and Team Introduction

	EHHS Alumni
	EHHS Faculty (FT)
	EHHS Faculty (PT, Adjunct)
	EHHS Staff/Administrator
	EHHS Student (Current)
	KSU Faculty/Staff (Outside EHHS)
	Community Member/Expert/ Friend of EHHS

• Ground Rules

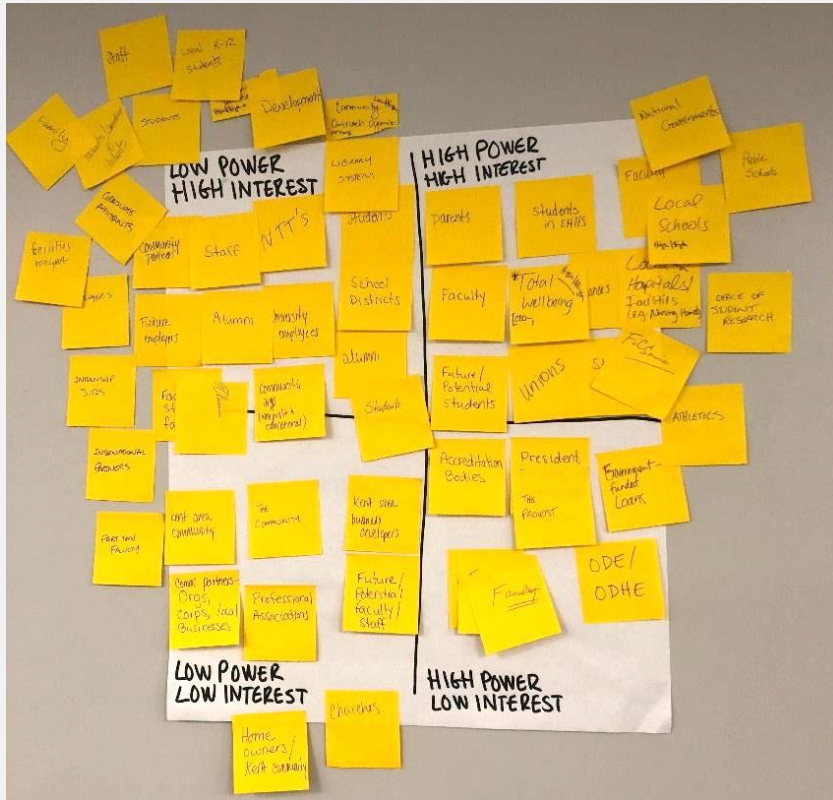
- **Respect** each other at all times.
- **What happens in this room stays in this room.**
- **Recommendations** from the *team* will be shared...
- Avoid **interrupting** one another.
- Issues not aligned with the priority will be placed in **parking lot** ...
- Please put away cell phones, tablets, and laptops...
- ...Use an index card to provide your thoughts...

MENU OF ACTIVITIES (AM)

- Reaction to retreat pre-reads
- Stakeholder list generation
- STEEP Analysis (Part I – Force Identification)
- SWOT Analysis (Part I – Generate Boards)
- Analysis of Distinctiveness (Optional)



STAKEHOLDER ANALYSIS: 2 APPROACHES



SWOT ANALYSIS (PART I)

STRENGTHS

- Visit + Admin "Community" Support
- Alumni Connections
- Collaborative Faculty
- Mentoring + Advising
- Dedicated Fac/Staff
 - ↳ Professional (Generally Speaking)
 - ↳ Effective Educators
- Community Partnerships → Tie to town/gown
- Div. Outreach Dept for EHHS (dedicated culture)
- Internationalization / Study Abroad
- IB programs - Minors
- CDC - ATOTC classroom
- Size - Comm. Relationships
- Passion
- Professionals
- Pride in what we do
- Post graduation opps. (Grad speaker series)
- Reputation (Teacher Interview Days)
- Intern. field, pract every ug program has experiential learning
- eSports + other innovative programs
- Leadership (Erica)

WEAKNESSES

- technology innovation - limited use of equipment
- decreased individualized attention to students - social media, persistence
- Communication - with students
- Adjuncts - lack of consistency in courses
- environments are not conducive to student well-being - student engagement
- non-competitive salaries/wages
- lack of cross-curricular & interdisciplinary collaboration
- top heavy administrative structure
- lack of Pedagogical content knowledge (PCK) outside of Teacher Ed.
- Support for diverse students/faculty
- Support for English Language Learners
- Absence of central location - being spread out
- technology for teaching
 *esp. online courses
- Students don't meet professors in their major until very late.
- morale of NTT
- Equity of resources compared to other colleges
- PR presence (lack of)
- Lack of/poor field experience placements
- Silos

OPPORTUNITIES

- Online Programs
- FYE course - Realign curriculum
- Interdisciplinary offerings
- Collaboration for student success
- Recruitment opps in the community for grad & undergrad / Pipelines
- Financial resources for students (scholarships w/ few applicants)
- to be experts in accessible/inclusive educational experiences
- branding & reputation of college + Kent State
- diversify faculty to represent students & share more knowledge (practical diversity diversity of experience)
- Increased field/experiential learning opportunities for students
- undergraduate research opportunities
- Leveraging alumni/partners to provide quality educat exper. (mentoring, shadowing, etc)
- Development of research centers that draw on expertise in EHHS
- Align research expertise of faculty (e.g. courses taught)
- Closing the gap between hie/lth. behaviors/skills and academic success/retention
- international students and programs

THREATS

- declining Enrollment/Birthrate
- Budget (RCM) + less money stays w/in college
- Choice in Institutions NED
- State oversight position in Univ. priorities
- Income inequality
- Cost of College
- Silos (while that vs the rest)
- Absent of Diversity (representation/division)
- Potential to lose programs
- Time & "doing more w/ less" / "wearing many hats"
- Inflexibility/encroachment hats
- Competition w/ online programs
- Slow reaction to changing students + parents
- faculty + staff morale
- Gateway courses a threat to retention
- EHHS not transparent w/ employment opportunities

MENU OF ACTIVITIES (PM)

- STEEP Analysis (Part II – Likelihood/impact)
- SWOT Analysis (Part II – Leverage/Avoid)
- Identification of Potential Strategic Directions
- Refinement of PSDs: \$100 Test, Dot Voting, or Forced Ranking
- Share-Outs (optional) and Debrief





STEEP ANALYSIS PART II

SWOT ANALYSIS (PART II)

STRENGTHS

- Vast + Admin. Community/Support
- Alumni Connections
- Collaborative Faculty
- Mentoring + Advising
- Dedicated Fac/Staff
 - ↳ Professionals (Generally Speaking)
 - ↳ Effective Educators
- Community Partnerships → Ties to town/region
- Div. Outreach Dept for ETHS (outreach to college)
- Internationalization / Study Abroad
- IB programs - Minors
- CDC - AT&T class room
- Size
- Comm. Relationships
- Passion
- Professionals
- Pride in what we do
- Post graduation opps. (Grad speaker series)
- Reputation (Teacher Interview Days)
- Intern, field, pract. - every ug program has experiential learning
- eSports + other innovative programs
- Leadership (Erica!)

WEAKNESSES

- Technology innovation - number of departments
- decreased individualized attention to students
- communication - to students
- adjuncts - lack of engagement
- environments are not conducive to student well-being
- non-competitive salaries
- lack of cross-curricular & interprofessional collaboration
- top heavy administrative structure
- lack of Pedagogical content knowledge (PCK) - advice of Teacher Ed.
- support for diverse students/faculty
- Support for English Language Learners
- Absence of central location - being spread out
- technology for teaching
- less online courses
- Students don't meet w/ professors - their major until very late.
- morale of NTT + pay inequality
- Equity of resources compared to other colleges
- PR presence (lack of)
- Lack of/poor field experience placements
- silos

OPPORTUNITIES

- Online Programs
- FYE course - Realign curriculum
- Interdisciplinary offerings
- Collaboration for student success
- Recruitment opps in the community for grad & under-grad / Pipelines
- Financial resources for students (scholarships w/ few applicants)
- to be experts in accessible/inclusive educational experiences
- branding/tripartite of college + kent state
- diversify faculty to represent students & to share more knowledge (diversity of experience)
- Increased field/experiential learning opportunities for students
- undergraduate research opportunities
- Leveraging alumni/partners to provide quality educ. exps. (mentoring, shadowing, etc.)
- Development of research centers that draw on expertise in ETHS
- Align research expertise of faculty (e.g. course taught)
- Closing the gap between health behaviors/skills & academic success/retention
- international students and programs

THREATS

TRADITIONAL MOSTLY

- Declining Enrollment/Budget (RCM) & less money stays w/in college
- Choice in Institutions NED
- State oversight - position in Univ. priorities
- Income inequality
- Cost of College
- Silos (white hall vs the rest)
- Lack of Diversity (representation / def. / written)
- Potential to lose programs
- Time & "doing more w/ less" / "wearing many hats"
- Competition w/ online programs
- Slow reaction to changing students' parents
- Faculty & staff morale
- Gateway courses a threat to retention
- ETHS not transparent w/ employment opportunities

DIRECTIONS

#3
SUPPORT EHS STUDENTS
FROM ENROLLMENT through
graduation and beyond.

#2
Provide the highest
quality of instruction
to all students

Advance technology to be on
the cutting edge of innovation
to remain competitive.

Address declining student enrollment
to maximize outreach & attract
a diverse student body

Actively recruit and hire
POC / underrepresented people
in faculty positions while
creating a supportive culture
to retain & foster their
Success

#11
Improve our social media and internet
footprint.

#9
Create proactive strategies (w/in curriculum) focusing
on the holistic approach to wellness to prevent
mental health issues.

#6
Improve communications in regard to student services
available to EHS students.

#7
Improve recruitment & retention of diverse
students, faculty, & staff.

#12
Emphasize holistic student health.

#1
Pursue recruitment & retention of non-traditional students

#8
Improve faculty access(es) to culturally relevant
pedagogies & trainings.

Increase diversity of students,
faculty and staff

#13
Support the ^{holistic} Health and
Wellness of all EHS students

#4
Provide more creative ways to financially
support students (incentive classes, paid intern-
ships, financial literacy class etc...)

#17
Improve relevancy of marketing strategies

Increase articulation agreements w/ local
community college institutions (Approach)

IDENTIFY
PSDs,
REDUCTION
OF PSDs...

REDUCING PSDs: \$100 TEST



PSD (Regional Impact)	#1 \$	#2 \$	#3 \$	#4 \$	Mean
Foster a collaborative environment	20	17	20	15	18
Strategize service and outreach	29	17	10	15	18
Develop new partnerships and strengthen existing partnerships	7	17	20	25	18
Enhance the employment and community engagement	19	17	10	15	18
Commit to diversity	0	16	30	15	18
Promote wellness across environments	30	16	10	15	18

PSD (Organizational Stewardship)	\$
Perform market analysis to identify viability and growth opportunities in both online and traditional program offerings	20
Dedicate financial and human resources focused on continual distribution of outcomes with stakeholders and alumni	30
Explore opportunities for innovation and entrepreneurship that increases the financial sustainability of the College	20
Identify key value constructs that facilitate engagement and a culture of care that boosts progress of faculty, students, and staff	20
Develop consistent and continuous data-driven accountability systems that highlight student success	10

OPTIONAL ACTIVITY: CHANGE ANALYSIS

“WILL THIS REQUIRE SIGNIFICANT CHANGE IN COLLEGE STRUCTURE, GOVERNANCE, PROGRAMS...?”

Example: Create an incentivized structure of faculty differentiation

Type of change	Group 1	Group 2	Group 3	Group 4
College structure	None	Major	Major	Moderate
Governance structure or processes	Minor	Major	Major	Major
Academic programs	None	Minor	Moderate	Moderate
College centers	Moderate	Minor	Minor	Minor
Student services	None	None	None	None
Revenues	Moderate	Moderate	Moderate	None
Facilities	Minor	Minor	None	None
Technology	Minor	Minor	Minor	None
Faculty Workload	Moderate	Major	Major	Major
Staff Workload	None	Minor	Minor	None
Stakeholder Relations	Moderate	Moderate	None	None

Practice with Activities

Stakeholder Analysis, Power/Influence Matrix, SWOT Analysis, STEEP Analysis, and Reduction Techniques (The \$100 Test, Dot Voting, Forced Ranking)



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WRAP-UP, QUESTIONS

- Please email me at eeckert@kent.edu (or leave a card) for templates and document ideas
 - Facilitator Template PPT
 - Facilitator Planning Guide
 - Facilitator Notes Template
 - Redirecting Strategic Groups (Courtesy of Dr. Jason Miller)
- Questions, comments?

