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

Erica Eckert, Assistant Dean, Assessment and Accreditation, Kent State University
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
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

The Society for College and University Planning

Guides available via email
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
STEEP Analysis (Part I)
SWOT Analysis (Part I)

**STRENGTHS**
- Unit + Admin Coordination/Support
- Alumni Connections
- Collaborative Faculty
- Mentoring + Advising
- Dedicated Fas/Staff
- Professional (Garrison Speaking)
- Effective Educators
- Community Partnerships + Ties/Dandi
  - Div. Outreach, Dept. for ETHS/PDP
  - Interalization/Study Abroad
- IB Programs
- MINDS
- CDC
- AT&T Classroom
- Passion
- Professionals
- Pride in what we do
- Post Graduation opps
- Reputation
- Intern/Field Prac

**WEAKNESSES**
- Technology for Teaching
- Left Online Courses
- Students don't treat professors as mentors and go away
- Morale of FTT
- Equity of resources compared to other colleges
- PR presence (lack of)
- Lack of/poor field experience placements
- Silos

**OPPORTUNITIES**
- Online Programs
- FYE Course - Analyze Curriculums
- Interdisciplinary offerings
- Collaboration for student success
- Recruitment apps in the community
  - for grad/undergrad/Prep
- Financial resources for students
  - Scholarships (few applicants)
  - to be experts in accessible inclusive educational experiences
  - Branding reputation of college, team, etc.
- Diversity culture to represent students to short more knowledge (make more emphasis)
- Increased field/experiential learning opportunities for students
- Undergraduate research opportunities
- Leveraging alumni/junior to private sectors
- Development of research centers that draw in expertise in STEM
  - Align research, expertise, and faculty (eg. science, math, business)
  - Closing the gap between for prof, behavioral skills
  - International students and programs

**THREATS**
- Declining Enrollment/Retention
- Budget cuts, money stays with college
- Choice in Institutions (NED)
- Stalk oversight of position in univ. priorities
- Income inequality
- Cost of college
- Silos (White Hill vs the rest)
- Absent of Diversity (opportunity/definition)
- Potential to lose programs
- Time and doing more with less/wearing many hats
- Inflexibility of enrollment paths
- Competition with online programs
- Slow reaction to changing student/parents
- Faculty/staff morale
- Gateway courses a threat to retention
- EHHS not transparent of 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**
- Unit & Admin. Community Support
- Alumni Connections
- Collaborative Faculty
- Mentoring & Advising
- Dedicated Faculty & Professional Staff
- Effective Educators
- Community Partnerships & Ties to Market
- Int. Outreach, Dept. for EHHS (Local)
- Internationalization/Study Abroad
- IB Programs – MYP
- CDC
- Size
- Comm. Relationships
- Passion
- Professionals: Pride in what we do
- Post Graduation Opportunities
- Reputation
- Teach Interview Days
- Interdisciplinary Projects
- Learning Environments: flexible learning
- Leadership (EHI)

**WEAKNESSES**
- Lack of central location; being spread out
- Technology for Teaching K-12 online courses
- Students don’t match program
- Equity of resources compared to other colleges
- PR presence (lack of)
- Lack of/ poor field placement

**OPPORTUNITIES**
- Online Programs
- ACE Course in History Curriculum
- Interdisciplinary offerings
- Collaboration for Student Success
- Recruitment moves in the community
- Good undergrad/PhD programs
- Financial resources for students
- Scholarships (few applicants)
- To be experts in accessible inclusive educational experiences
- Branding: Reputation of college & field
- Diversity faculty to represent students in short more knowledge (minority of experience)
- Increased field/ experiential learning opportunities for students

**THREATS**
- Declining Enrollment
- Budget (Rcn) less money from grants
- Choice in Institutions
- Stake oversight position in
- Income inequality
- Cost of College
- Silos (White Hall vs. the rest)
- Inequity of Diversity (representation/definition)
- Potential to lose programs
- Time 
- “Darwin more/less”/unfair
- Inflexibility/encroach on
- Competition in online programs
- Slow reaction to changing students/parents
- Faculty & Staff morale
- Gateway /courses a threat to retention
- EHHS not transparent of employment opportunities
DIRECTIONS

Support ETHS students from enrollment through graduation and beyond.

1. Provide the highest quality of instruction to all students.
2. Advance technology to be on the cutting edge of innovation to remain competitive.
3. Address declining student enrollment to maximize outreach & attract a diverse student body.
4. Actively recruit and hire POC/underrepresented people in faculty positions while creating a supportive culture to retain & foster their success.

Increase diversity of students, faculty and staff.

Support the health and wellness of all ETHS students.

- Provide more creative ways to financially support students (incentive scholarships, paid internships, financial literacy class).
### Reducing PSDs: $100 Test

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

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

"Will this require significant change in college structure, governance, programs...?"

Example: Create an incentivized structure of faculty differentiation

<table>
<thead>
<tr>
<th>Type of change</th>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3</th>
<th>Group 4</th>
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</thead>
<tbody>
<tr>
<td>College structure</td>
<td>None</td>
<td>Major</td>
<td>Major</td>
<td>Moderate</td>
</tr>
<tr>
<td>Governance structure or processes</td>
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<td>Major</td>
<td>Major</td>
<td>Major</td>
</tr>
<tr>
<td>Academic programs</td>
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<td>Minor</td>
<td>Moderate</td>
<td>Moderate</td>
</tr>
<tr>
<td>College centers</td>
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<td>Minor</td>
<td>Minor</td>
<td>Minor</td>
</tr>
<tr>
<td>Student services</td>
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<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Revenues</td>
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<td>Moderate</td>
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<tr>
<td>Facilities</td>
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<td>Minor</td>
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<tr>
<td>Technology</td>
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<td>Minor</td>
<td>None</td>
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<tr>
<td>Faculty Workload</td>
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<td>Major</td>
<td>Major</td>
<td>Major</td>
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<tr>
<td>Staff Workload</td>
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<td>Minor</td>
<td>Minor</td>
<td>None</td>
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<tr>
<td>Stakeholder Relations</td>
<td>Moderate</td>
<td>Moderate</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>
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?