



**Strategic
Planning
Retreat
August 15, 2019**



Planning Strategically

Prepared by the VPAA's Office

Why Planning Matters

- External stakeholders (accreditors) are scrutinizing plans more closely.
- Leadership transitions happen much more frequently.
- Students and donors seek institutions that project and embody direction and vision.
- It is a political tool protecting institutions from over-zealous trustees and lawmakers beholden to trends.



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Why Planning Matters

- It can be a marketing tool for communicating with valuable current and future stakeholders.
- It is a powerful tool to develop identity, allowing for soul-searching and choice-making.
- It is a powerful tool for coordinating between various competing demands.
- It can create buy-in from faculty and staff needed to facilitate change.



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Why Plan at All?

- Some plan because they believe it is expected.
- Some plan because an old plan is expiring.
- Some plan because of new leadership
- Some plan to placate an external audience (accreditor).

Those who plan for for simplistic or formulaic reasons are unlikely to leave a significant mark. – Martin Kurzweil



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Why Plan at All?

- Some plan so they can thrive and grow when the environment changes around them.
- Some plan to bring medium and long-term goals and directions to fruition.
- Some plan to cultivate a common conversation that permeates the culture of an institution.

It is about projecting your value to those who know you, and those you wish knew you... what do they see in you, what value do you offer that makes them say they want to be aligned with you. - Daniel R. Porterfield, President and CEO of the Aspen Institute



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The Art of Timing

The emphasis is on how we can create an institution that is nimble, changes, and pivots quickly when necessary. – Donald E. Heller, Provost and VPAA University of San Francisco

- Shorter timeframes for plans, 3-5 years, are quickly becoming the norm.
- Regardless of time horizon, the goal is to frequently track the plan's progress, implementation, successes, and missteps.
- To give resources to the substantive action elements, not craft the most eloquent statements. To balance clear and cogent language and effective action.



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The Planning Process Minot State's Timeline

- **Create/Implement the plan – 2015-2018**
- **Update and implement the plan – Ongoing**

Most relevant today:

- **Assess the landscape**
- **Evaluate outcomes**

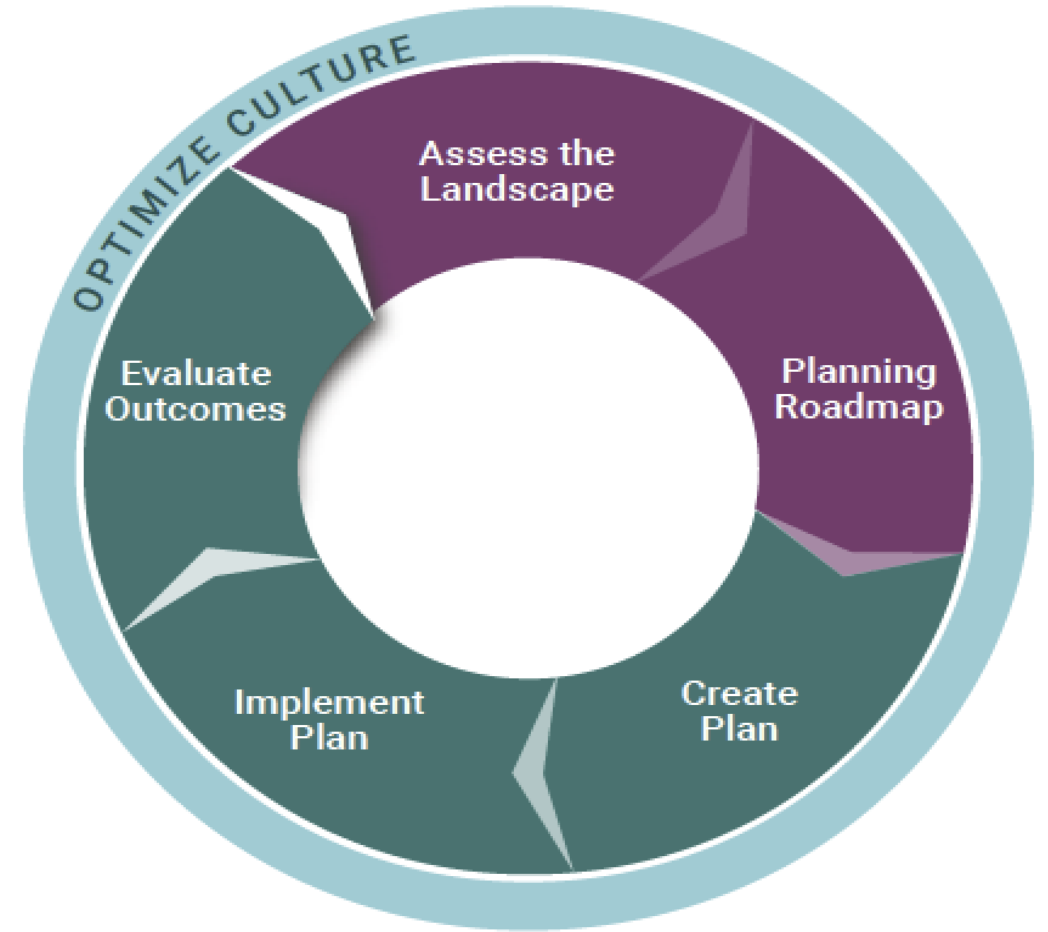


Figure 4 - The SCUP Integrated Planning Model is one example of the high-level planning steps leaders can follow. Source: Society for College and University Planning



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Making Metrics Measure Up

- Metrics are frequently chosen because they are already available or because measurement can be taken without too much trouble, not because they are the ideal marker of progress.
- Make sure your action items and metrics are measuring what you want (e.g., LBK Kmart story).
- Better measurement can provide better solutions, but it is not a guarantee.
- The base minimum is agreement...agreement on what metrics will be used and will provide insight as unambiguously as possible.

It is a huge mistake to think this is just a technical problem of getting the right measures. It all about behavior and what kind of behavior we want to incentivize. – Alexander C. McCormick, Associate Professor of Educational Leadership at Indiana University



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Effective Practices

- **Integrated planning** produces integrated results that inform all necessary levels of institutional leadership.
- **Realistic assessment** of where the institution stands and where it can go.
- **Inclusive planning** that seeks to balance the diverse perspectives of an institution by providing a voice to a broad swath of leaders.
- **Action** that is focused but allows for evolution.
- **Leaders own plans** and constantly reinforce the plan.
- **Remember, culture eats strategy for breakfast.**



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Ineffective Practices

- **Going to extremes:** the plan is either completely top-down or bottom up.
- **Planning for status quo:** nothing is changing, so, why are we?
- **Not listening to the data:** ignoring or misreading data is a critical error.
- **Wasting energy:** don't get bogged down in semantics and tedious details.
- **Basing it all on budget:** finances are important but not everything.
- **Taking implementation shortcuts:** nothing is a substitute for focused attention to relevant details that move progress.



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SWOT

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Minot State SWOT Review

- Attendees – Invited faculty, directors, chairs, and supervisors
- Non-attendees – All other campus personnel
- **Strengths** usually describe what an organization excels at and what separates it from competition.
- **Weaknesses** stop an organization from performing at its optimum level. They are areas in which the organization needs to improve to remain competitive.
- **Opportunities** refer to favorable external factors that could give an organization a competitive advantage.
- **Threats** refer to factors that have the potential to harm an organization, to impeded its progress in the short-, mid-, and long-term.



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Strengths

Attendees	N	%
Qualified Personnel	39	17.65%
Program/Degree offerings	29	13.12%
Faculty-Student Interactions	27	12.22%
Affordability/ Tuition	27	12.22%
Size	20	9.05%
Campus Climate/Life	18	8.14%
Quality Education	12	5.43%

Non-Attendees	N	%
Campus Climate/Life	74	17.25%
Qualified Personnel	67	15.62%
Size	53	12.35%
Program/Degree Offerings	40	9.32%
Affordability/ Tuition	38	8.86%
Faculty-Student Interactions	33	7.69%
Quality Education	25	5.83%
Facilities	22	5.13%



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"Our size, cost, and safe community make us an appealing option for many students."

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Weaknesses

Attendees	N	%
Vision/Planning	44	19.13%
Leadership/Governance	21	9.13%
Program/Degree Offerings	17	7.39%
Marketing/Outreach	14	6.09%
Enrollment/Recruitment	14	6.09%
Budget/Funding Issues	13	5.65%
Employee Workload	12	5.22%

Non-Attendees	N	%
Facilities	38	10.22%
Leadership/Governance	36	9.68%
Employee Compensation	31	8.33%
Budget/Funding Issues	23	6.18%
Employee Workload	22	5.91%
Vision/Planning	21	5.65%
Marketing/Outreach	20	5.38%
Program/Degree Offerings	20	5.38%
Enrollment/Recruitment	20	5.38%



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Opportunities

Attendees	N	%
Program/Degree Offerings	38	21.23%
Marketing/Outreach	17	9.50%
Enrollment/Recruitment	14	7.82%
Qualified Personnel	13	7.26%
Online Learning	13	7.26%
Community Engagement	12	6.70%
Quality Education	10	5.59%
Location	10	5.59%
Vision/Planning	9	5.03%

Non-Attendees	N	%
Community Engagement	33	10.58%
Program/Degree Offerings	28	8.97%
Enrollment/Recruitment	25	8.01%
Location	20	6.41%
Quality Education	20	6.41%
Online Learning	18	5.77%
Marketing/Outreach	17	5.45%
Affordability/Tuition	16	5.13%



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Threats

Attendees	N	%
Enrollment/Recruitment	26	13.98%
Budget/Funding issues	24	12.90%
Vision/Planning	22	11.83%
Leadership/Governance	18	9.68%
Competing Institutions	13	6.99%
Retention Students/Personnel	13	6.99%
Program/Degree Offerings	13	6.99%
Innovation	12	6.45%
Campus Climate/Life	10	5.38%

Non-Attendees	N	%
Budget/Funding issues	44	14.19%
Leadership/Governance	34	10.97%
Competing Institutions	31	10.00%
Campus Climate/Life	27	8.71%
Enrollment/Recruitment	23	7.42%
Program/Degree Offerings	21	6.77%
Vision/Planning	17	5.48%
Qualified Personnel	16	5.16%



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"Trying to appease state legislature rather than fighting vehemently to carve a unique position among ND's universities."

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**Goals for
Today**

Today's Goals

- Sharpen Empowering Generations
- Update and refine objectives and action items
- Identify metrics



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In Your Group

- Select a facilitator/leader for your table
- Select a notetaker
- Identify a presenter
- **Use your resources**
 - Online evidence library
 - Evidence binder
 - Handouts
 - Your group members



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Small Group Work

Thinking about the data available, the results of the SWOT, Minot State's location and economic realities, and your own experiences:

- **Evaluate the objective**
- **Propose up to three new action items that may fit under your objective.**
 - Formulate these new action items before reviewing the current action items.

Handout 1

20 Min.



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Small Group Work

Handout 2

Review and evaluate the action items under your objective.

Consider the action item in the following terms:

- **Is it completed?**
- **Is it still relevant?**
- **Does it need updating?**
- **Does it have metrics/need metrics?**
- **Does it list a person(s) responsible or need a person responsible?**

Propose a solution, including a metric(s) and responsible person/office.

1 Hour



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Lunch

Small Group Work

Handout 3

Review your new action items.

Determine if the objective needs new action items and if so, make sure to include metrics and responsible person/office.

30 Min.



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Small Group Work

Handout 4

**Formalize the action items (new and existing),
metrics, and who may be responsible.**

30 Min.



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Gather as a Goal

**Discuss with your goal group your action items.
Try to note where there is overlap between your
action items.**



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Gather as a Goal

Goal 1: SE corner of the Conference Center

Goal 2: NW corner of the Conference Center

Goal 3: SW corner of Conference Center

Goal 4: NE corner of Conference Room

Goal 5: Flattail Press Gallery

Goal 6: Outside the Westlie Room

20 min.



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Small Group Work

Handout 5

Summarize and tweak action items based on the conversation during the goal conversation.

10 min.



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Report Out

Share a summary of your group's work.

Keep your report to about 3 - 4 minutes!



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Next Steps

- Please complete the survey about today's event. Look for an email.
- Today's work will be reviewed by the Strategic Planning and Budget Council as well as President's Staff.
- Updates to Empowering Generations will be shared with campus.



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**Thank
you!**