



Strategic Planning Workshop

September 28-29, 2015

Dams & Associates, Inc.
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Project Overview

On September 28 and 29, 2015, President Kurtz convened the Strategic Planning Leadership Team to kick off the Shawnee State University's strategic planning process. The goal of the planning process is to develop a strategic plan for the University as well as divisional strategic plans aligned with the university plan.

During the September workshops, the Leadership Team developed working drafts of SSU mission, vision, and enduring values. The results and deliberations are contained in this report.

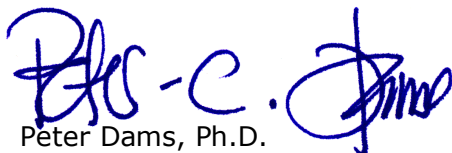
In addition to developing these guiding principles, the Strategic Planning Leadership Team discussed the planning timeline, what elements the final strategic plan should contain, and how the university strategic plan will be cascaded to the divisions and colleges. The Team reviewed samples of strategic plans from other institutions, including practical templates for divisional and college plans.

As a next step, the University will conduct three community forums to obtain input from university, local, and regional communities regarding the major strategic themes identified by the Board of Trustees. These themes are *Academic Programs*; *Shawnee State as an Open Access University*; and *Serving our Students and Community*. Community members will be asked to refine these themes in light of the proposed university vision.

In July 2016, President Kurtz will ask the Board of Trustees to adopt the strategic plan. Beginning with the Fall 2016 semester, the Strategic Planning Leadership Team will implement the process for creating divisional and college-level strategic plans.

It has been our pleasure to work with the Strategic Planning Leadership Team. We look forward to being part of your strategic planning journey.

Respectfully submitted,



Peter Dams, Ph.D.

Dams & Associates, Inc.

Workshop Participants

We gratefully acknowledge the time, expertise, and insight of these participants:

Jeff Bauer*	Interim Provost and Vice President, Academic Affairs
Elinda Boyles*	Vice President, Finance and Administration
Bob Trusz	Vice President, Student Affairs
Paul Madden	Dean, College of Professional Studies
Brenda Haas	Dean, University College
Andy Napper	Interim Dean, College of Arts and Sciences
Marcie Simms	Dean of Students
Becky Thiel	Interim Associate Provost
Eric Braun	Interim Special Assistant to the President for External Affairs and Executive Director of Development
Chris Shaffer	Director, Institutional Effectiveness
Elizabeth Blevins*	Director, Marketing and Communications
Andrew Feight	Faculty – Social Sciences and President, University Faculty Senate
Michael Barnhart	Faculty – Fine, Digital and Performing Arts
Mich Nyualo	Faculty – English and Humanities
Marc Scott	Faculty - English and Humanities
Tony Ward	Faculty – Rehabilitation and Sport Professions
Ginny Pinson	Faculty – Business Administration
Rick Kurtz, Ex Officio*	President

* Denotes members of the Steering Team

Overview of the Strategic Planning Process

Phase 1: Strategic Plan Development (2015-2016)

- Develop mission, vision, and enduring values for the University
- Determine what the final plan should look like
- Conduct three community forums
- Develop the final draft of the University strategic plan and develop measures of success
- Toward the end of the 2016 spring semester, develop an outline of Phase 2
- Board of Trustees adopts Strategic Plan (July 2016)

Phase 2: Implementation (2016-2017)

- Work with divisional and college leadership to create divisional and college strategic initiatives that reflect the Strategic Plan
- Develop specific templates to ensure uniform formatting

Guiding Principles: Working Draft

Our Mission

We prepare today's students to succeed in tomorrow's world.

Our Vision

We will be a best-value university offering a wide range of high-quality signature programs.

Our Enduring Values

As members of the Shawnee State University community, we are committed to these enduring values in our interactions with our students, families, alumni, friends of the University, and each other.

Student-focused Service

- Personalized attention; follow-through; responsiveness; client manager approach*

Community Engagement

- Internal and external; respect for diversity

Authentic Dialogue

- Honesty; with students regarding their success potential; with each other; respectful; free speech; open dialogue; authentic dialogue; Sincere / genuine / trustworthy; academic freedom; complete communication; Active listening

Thoughtful Risk-taking

- For SSU and students; innovation hub; entrepreneurship; creativity; try out dreams; venture; innovation; forward-looking; bridge

Culture of Continuous Improvement

- Refresh, create new program opportunities, professional development

*Explanatory descriptions are preliminary only

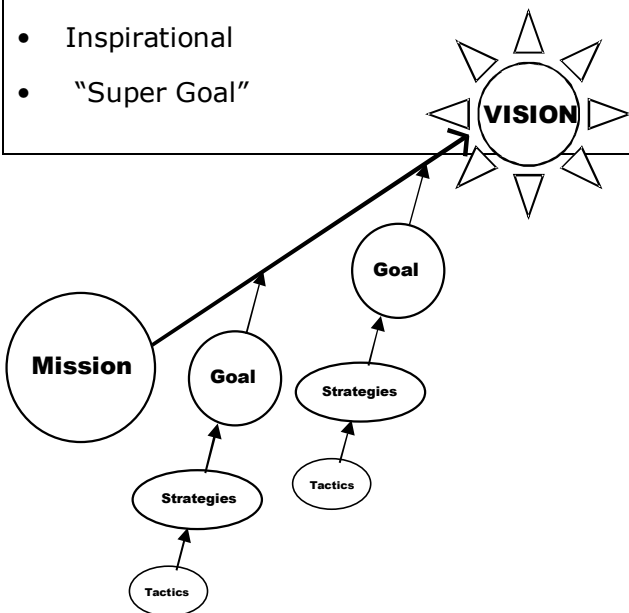
These working drafts will be shared at the Community Forums and finalized spring 2016.

Results of Strategic Planning Activities

Mission and Vision = Foundations for the Future

Mission	
<p>Purpose</p> <ul style="list-style-type: none"> • Explains why an organization or group exists • Describes purpose • Practical • Describes benefits to customers 	<p>Example</p> <p>The mission of the Kalamazoo Airport is to provide facilities and services to support safe, efficient, and convenient air transportation enhancing economic growth and high quality of life in Southwest Michigan.</p>

Vision	
<p>Purpose</p> <ul style="list-style-type: none"> • Shows what organization wants to become • Describes potential of the organization or clients and customers • Inspirational • "Super Goal" 	<p>Example</p> <p>To be the airport of choice for all Southwest Michigan air travelers.</p> <p>To have more non-stop airline service to more major cities than any other airport our size.</p> <p>To be the most environmentally friendly airport in the nation.</p>

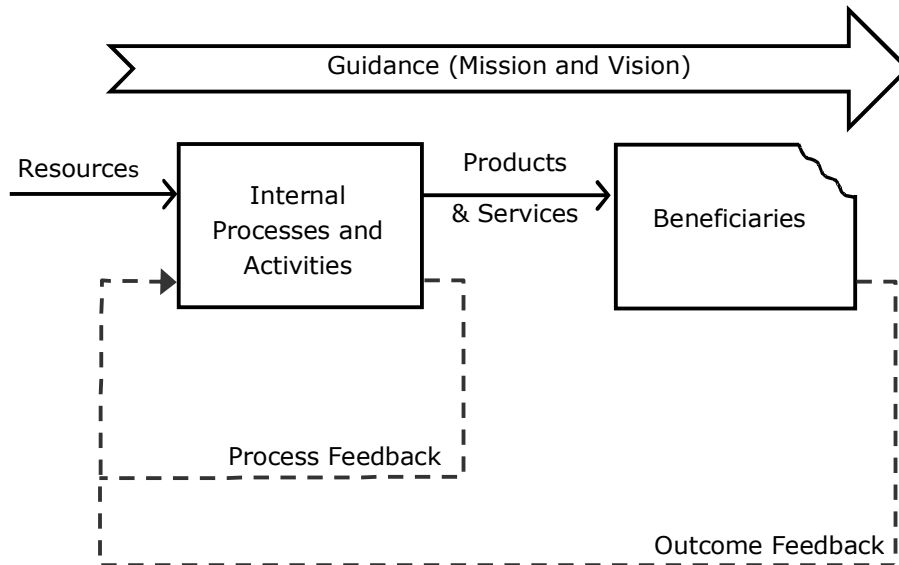


Once the vision is established, an organization can create aligned long-term goals that will move the organization toward its super goal – the vision.

Strategies and tactics break goals into smaller manageable implementation steps.

Shawnee State University: A Total Performance System

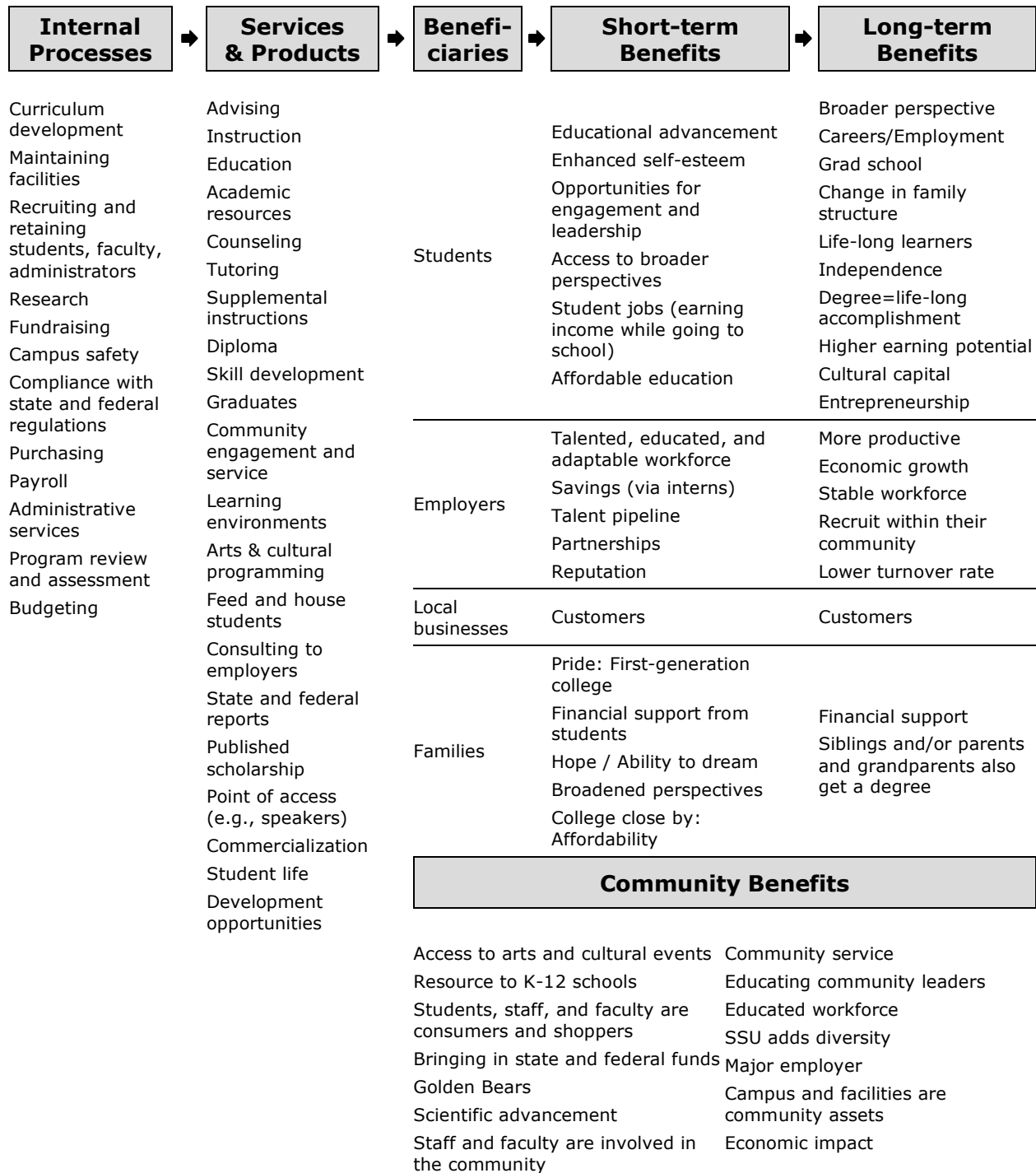
The purpose of this exercise was to develop an understanding of Shawnee State University as an organizational *performance system* before embarking on drafting various mission statements.



Mission and Vision	The mission describes the reason for the existence for the system. The vision provides strategic direction.
Resources	Information, technology, people, money, or material that is a resource for – or initiates –internal work processes.
Internal Processes	Processes that use the resources to generate outputs valued by customers.
Process Feedback	Internal information about the internal performance (efficiency and quality) of individuals, work groups, or processes.
Products and Services	Outputs produced by the internal processes. Can be tangible products or intangible services.
Customers	Direct customers and others benefitting from a service or product - Stakeholders, Community, . . . ?
Outcome Feedback	External information about service outcomes and quality from customers and other external sources.

Every organization uses resources such as staff, money, and equipment to conduct internal activities (i.e., valued-added processes) that result in specific products and services. The underlying assumption is that customers benefit in the short- and long-term from these products and services. At the macro level, benefits to customers and other stakeholders should result in positive outcomes for the entire community.

The Shawnee State University System Elements



Mission Drafts

Based on the system elements exercise, we created the following draft mission statements. **Bolded words** were considered to convey key phrases.

The mission of Shawnee State University is to . . .

Draft 1	Provide a well-rounded educational foundation for our students to be engaged citizens and life-time scholars
Draft 2	Develop students into life-long learners and leaders who are able to adapt to the changing needs of the region
Draft 3	Enhance the local and global communities through the preparation of broadly educated servant- leaders through its rich academic culture and service programs
Draft 4	Educate future leaders , thinkers, dreamers, and engaged citizens
Current Mission	Shawnee State University-the regional state university for Southern Ohio-prepares students for the changing needs of business, industry, education, and society through its diversified degree programs. Recognizing the importance of knowledge, values, and cultural enrichment, Shawnee State University is committed to providing higher education that fosters competence in oral and written communication, scientific and quantitative reasoning, and critical analysis/logical thinking. To enrich the lives of the community , the University provides opportunities for continuing personal and professional development, intellectual discovery , applied research, and appreciation for the creative and performing arts.

Additional phrases:

- Global citizen
- Affordable education

Imagine five to ten years from now . . .

How will Shawnee State University serve its clients differently than today? (How will your clients be better off because of the services you will provide five years from now?)	When asked about Shawnee State University five years from now, what will your most important stakeholders say about you? What would you like them to say? What should they say?	How must you operate differently five years from now to achieve #1 and #2?
<p>More focus on students who have a reasonable potential for success</p> <p>Expansion of campus activities</p> <p>Be more flexible in delivery of education and student services</p> <p>Increased hybrid or distance learning</p> <p>More personalized/one-stop</p> <p>More customer-focused</p> <p>Build relationships with students early on</p> <p>Efficiencies for students</p> <p>Less reliance on adjunct faculty</p> <p>More well-rounded education</p> <p>Less debt for housing students</p> <p>Systematic modernization of facilities</p> <p>Offer large array of graduate programs</p> <p>Adapt more academically to the changing needs</p> <p>Pro-active academic innovation</p>	<p>"SSU offers a high-quality education at affordable prices."</p> <p>"I had a great experience!"</p> <p>"They changed my life."</p> <p>"A dynamic university meeting the needs of its students."</p> <p>"They helped me be successful."</p> <p>"Grads are great hires."</p> <p>"Challenging, but totally worth it."</p> <p>"We value SSU. It is a net contributor." (The larger community)</p> <p>"They are good stewards of time and money."</p> <p>"I want to stay connected and involved." (Retirees)</p>	<p>Find better ways to obtain graduate feedback – build more alumni connections</p> <p>Enhance entrance requirements; beef up college preparedness (e.g., alternative curriculum)</p> <p>Improve the communication and connectivity infrastructure (e.g., more paperless)</p> <p>Rethink recruiting: More intentional</p> <p>Hire more full-time faculty</p> <p>Maintain student-faculty ratio</p> <p>Increase fundraising</p> <p>Operate within financial means</p> <p>Data-based/zero-based budgeting</p> <p>Engage in thoughtful risk-taking</p> <p>Streamline processes</p> <p>Improve early advising</p> <p>Drive customer focus</p>

Vision Drafts

Based on the answers to the visioning questions, we drafted the following vision statements. **Bolded words** were considered to convey key phrases.

Five to ten years from now, . . .

Draft 1	Clients will point to their Shawnee education as a key ingredient of their success
Draft 2	Shawnee State University will be the first choice for quality and affordable education for more students from around the Midwest
Draft 3	Shawnee State University will provide a quality and affordable (competitively priced / value) education while focusing on student success , seamless service, and a truly positive educational experience
Draft 4	Shawnee State University will manifest the spirit of continuous improvement in all of its activities, processes, and functions

Additional phrases:

- Alumni stay engaged for future growth and student success
- Student satisfaction

Drafting the Enduring Values

How should we as members of the Shawnee State University community conduct ourselves as we work to achieve our mission and vision?	What do our clients expect from us in terms of our behavior?
<p>Collaborative internally and externally (9)</p> <ul style="list-style-type: none"> • Engaged with the community • Advocate for SSU and the community <p>Honest and transparent communication (7)</p> <ul style="list-style-type: none"> • With students regarding their success potential • Candor and clarity <p>Dignity and respect (6)</p> <ul style="list-style-type: none"> • Treated with respect • Free speech center <p>Accountable (3)</p> <p>Growth plus quality (1)</p> <p>Every student can be successful</p> <p>Adapt to change</p> <p>Fairness and equity</p>	<p>Student-centered (15)</p> <ul style="list-style-type: none"> • Individualized care • Student-focused • Personalized care • Service-oriented (e.g., disabled) <p>Affordability/value (7)</p> <p>Up-to-date (3)</p> <p>Good stewardship of resources</p> <p>Efficiency</p> <p><u>Teaching</u> institution</p> <p>Practical application of education/pragmatic</p>

Community Forums

Proposed Topics

1. Academic Programs

- a. Where are our primary areas of academic program comparative advantage? Put another way what are the signature academic programs at SSU
- b. Are we well positioned to leverage our academic strengths?
- c. What should we be doing to prioritize, leverage and expand upon our areas of comparative advantage?
- d. What is the academic dream we want to convey to students and prospective students? How do we encourage students to dream and to pursue their academic dreams?

2. Shawnee State as an Open Access university

- a. Our institution is a statutorily designated Open Access university. Today, the ways we interpret and implement provisions of Open Access are not what they were 30 years ago. How would you define and interpret Open Access as currently practiced at our university?
- b. In consideration of our discussions about mission, vision and enduring values how should we define and implement Open Access in the next generation of the university?
- c. Do we need to redefine open access for a new generation?

3. Serving our Students and Community

- a. Whether defined through the for-profit business expression "customer service" or the professional societies and non-profits term "client service" public universities are considered service organizations. How would you define our university's roles as a service organization?
- b. Who are our clients and what are the primary services we provide or need to offer?
- c. How well does our university do in the provision of services to our clients? Can we say that as an institution we are client driven?
- d. Is our delivery of services through the means, mechanisms and at times that best serve the needs of our clients?
- e. Does our role as service provider extend sufficiently to the community? What are the expectations of our university when it comes to community engagement? Do we clearly articulate the parameters for the community we serve?

Preliminary Forum Considerations

1. Shawnee State as an Open Access university
 - a. Very specific topic within broader context of defining the student body
 - b. Define “open access”
 - c. Forum to present pros and cons

2. The working draft of the SSU guiding principles will be introduced at each forum

3. Desired outcomes
 - a. Inform the strategic planning process
 - b. Fine-tune topics so they can become “strategic themes or priorities”

4. Participants
 - a. Open forum
 - b. Invitations to topic-specific audience

5. Facilitation by SSU and community thought leaders

Completing Phase 1: Next Steps

Date	Planning Step	Participants
	<u>Prepare community forums</u> <ul style="list-style-type: none"> • Create the agenda 	Steering Team
	<u>Prepare community forums</u> <ul style="list-style-type: none"> • Coach the agenda 	Steering Team and Thought Leaders
January 20	<u>Community Forum 1</u> <ul style="list-style-type: none"> • Academic Programs 	Thought Leaders
	<u>Debrief Forum 1</u>	Steering Team
January 27	<u>Community Forum 2</u> <ul style="list-style-type: none"> • Shawnee State as an Open Access university 	Thought Leaders
	<u>Debrief Forum 2</u>	Steering Team
February 3	<u>Community Forum 3</u> <ul style="list-style-type: none"> • Serving our Students and Community 	Thought Leaders
	<u>Draft high-level University strategic plan</u>	Steering Team
Late March 2016	<u>On-Campus Planning Sessions</u> <ul style="list-style-type: none"> • Develop final draft of strategic plan • Develop measures of success • Constituent review of rough draft 	Strategic Planning Leadership Team
April	Campus Community Forum: Rough draft presentation	
May	Final cleanup of plan for presentation to BOT	
June	Dams & Associates submits final draft of the strategic plan	
July	Adoption by the Board of Trustees	

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