

# Fall Conversation on Strategic Plan Academic Advancement Network

October 27, 2020

# Agenda

- Welcome
- Steering Committee work
- Focused Inquiry Group work
  - Values
  - Size and Scope of MSU
  - Institutional Resources
  - Online Learning
- Observations
- Discussion and questions
- Next Steps

# Steering Committee Membership

## Committee Co-chairs

- Vennie Gore
- Joseph Salem Jr.

## Committee Members

- Brianna Aiello
- Merri Jo Bales
- Norman Beauchamp
- John Beck
- Debra Bittner
- Rebecca Campbell
- Pero Dagbovie
- Megan Donahue
- Doug Gage
- Jeff Grabill
- Jennifer Gruber
- Sanjay Gupta
- Thomas Jeitschko
- Jennifer Johnson
- Wanda Lipscomb
- Joan Rose
- Anna Maria Santiago
- Michael Zeig

## Focused Inquiry Groups

- Values subcommittee, led by Jennifer Johnson
- Optimal size and scope of MSU, led by Anna Maria Santiago
- Online learning, led by Jeff Grabill
- Institutional resources, led by Thomas Jeitschko

## Key questions for the Committee to address



How should MSU position itself for leadership and distinguish itself as a model, next-generation, land-grant institution?



How can we create an aspirational and meaningful shared institutional vision for the future?



How can we leverage our collective resources and anticipate society's evolving needs to establish cross-institutional priorities and initiatives?



What does the fourth industrial revolution and the new economy mean for MSU and those it serves?



How do we answer the intractable institutional challenges (i.e., deferred maintenance, financial position)?



How will we align our skills, incentives, and resources to create a plan to achieve our collective vision?

# Steering Committee Deliverables



Review our mission and values



Develop and recommend strategic themes based on campus engagement



Aggregate themes and develop strategic plan framework for recommendation to President Stanley and the Board of Trustees



Coordinate and provide leadership to working groups to address strategic themes



Identify and recommend key strategic goals and objectives

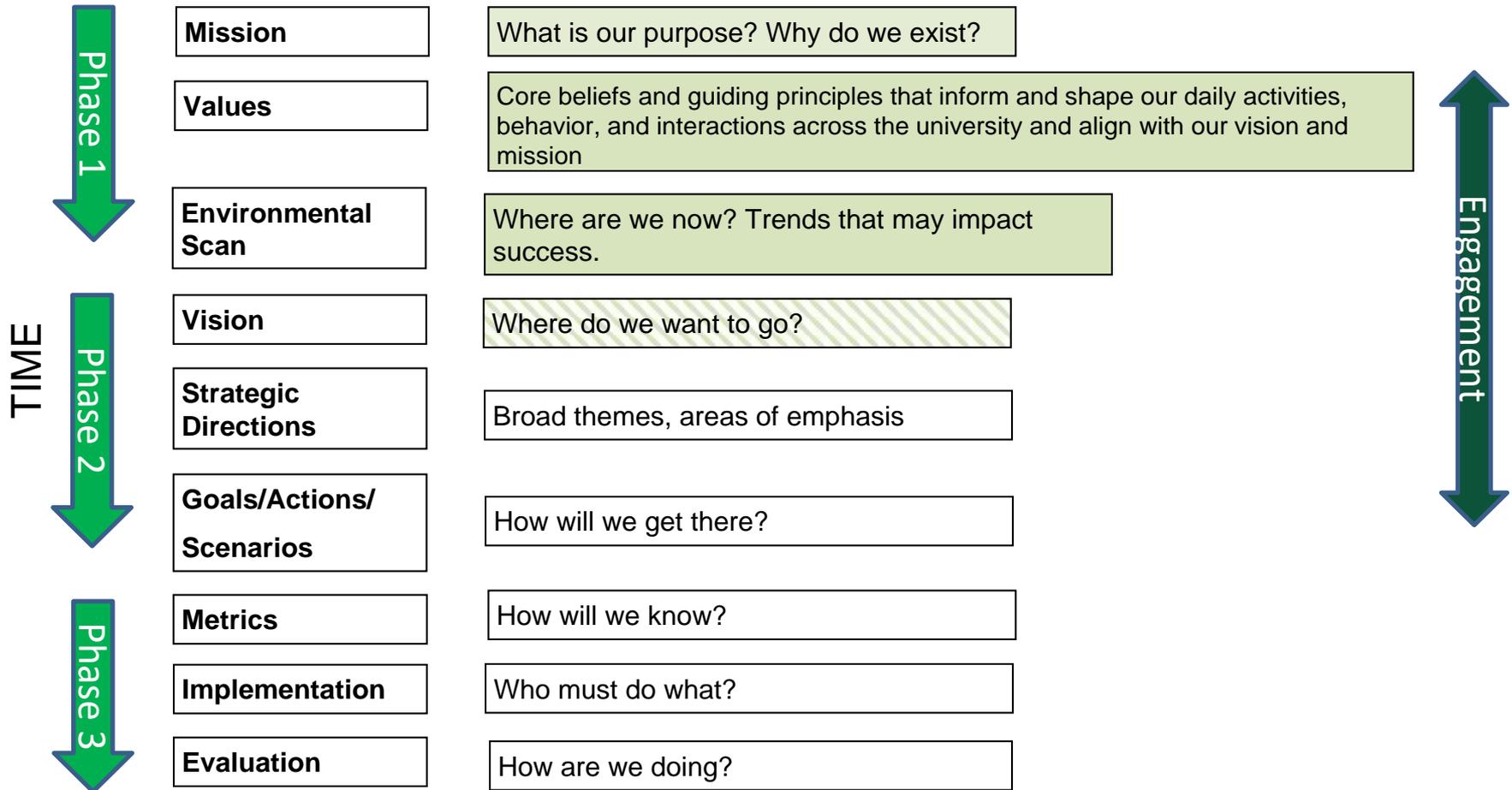


Produce a strategic plan for recommendation to President Stanley and the Board of Trustees



Make recommendations for implementation

# The Strategic Planning Process



## High level, major accomplishments

- MSU Senior Leadership Retreat (March 2020)
- Environmental scan, various MSU speakers (Spring-Summer 2020)
  - Topics including higher education trends, budget and resource models, diversity, equity and inclusion, research, student success, enrollment, graduate education, academic human resources
  - Future topics: international engagement, extension and outreach
- Focused inquiry groups (Summer – Fall 2020)
  - Values articulation – input collection and analysis; re-confirming
  - Optimal Scope and Scale of MSU
  - Online Learning
  - Institutional Resources

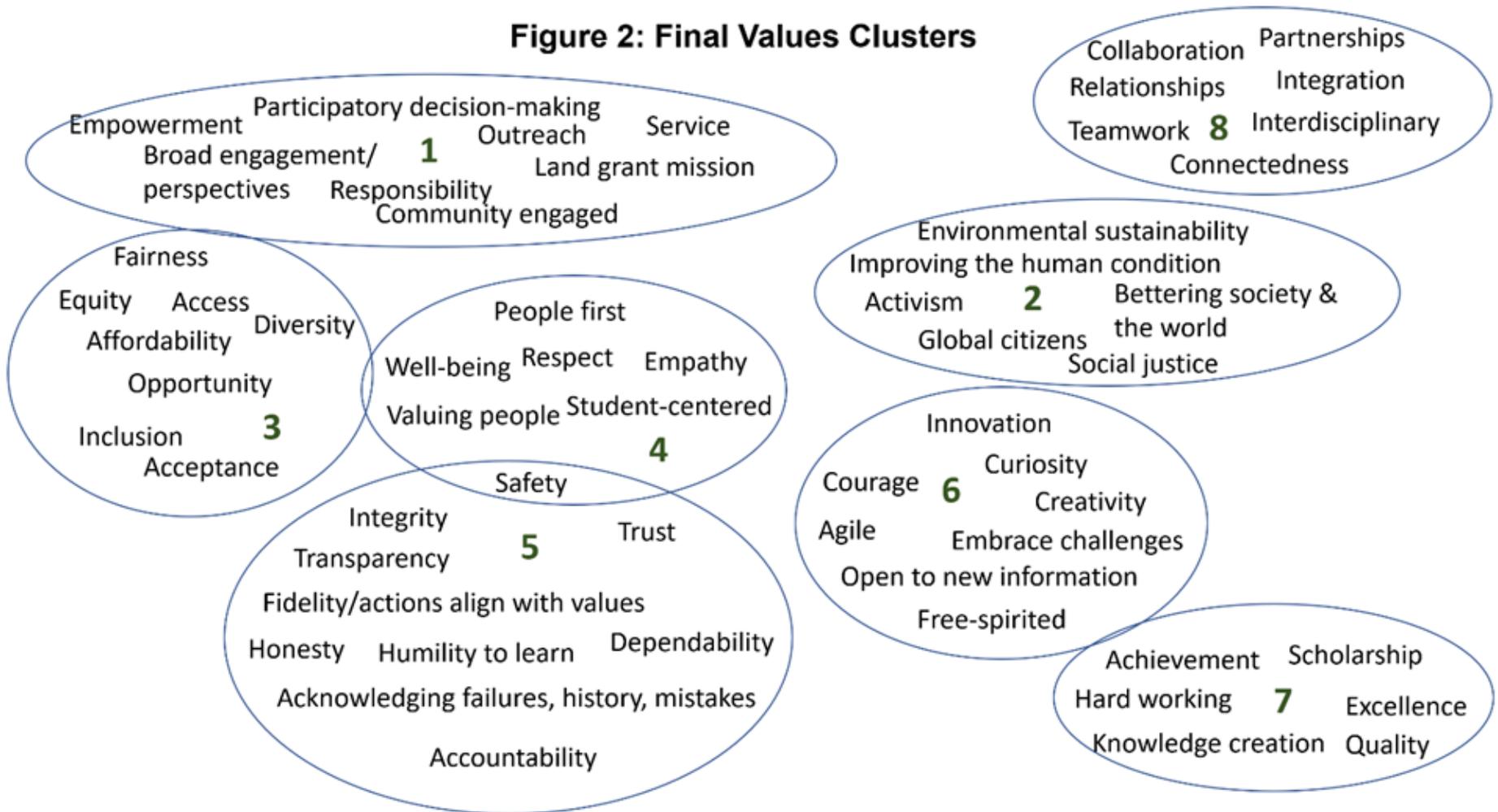
## Focused Inquiry Groups

- Values
  - Jennifer Johnson, lead
- **Optimal Size and Scope of MSU**
  - Anna Maria Santiago, lead
- **Institutional Resources**
  - Thomas Jeitschko, lead
- **Online Learning**
  - Jeff Grabill, lead

## Values Subcommittee Update

1. Steering Committee exercise: February 2020 (n = 21)
2. Online campus engagement on values: April -June 2020
  - Mission questions (n = 245):
    - 115 (47%) faculty/academic staff; 79 (32%) alumni; 52 (21%) support staff; 24 (10%) donors [all had another role as well], **14 (6%) graduate students**, 10 (4%) parents, **5 (2%) undergraduate students**, 2 exec management, 3 retirees
  - Values questions (n = 175)
    - 91 (52%) faculty/academic staff, 52 (30%) alumni, 38 (22%) support staff, **13 graduate students**, 11 donors, 7 parents, 3 retirees, **2 undergraduate students**, 1 exec management.
3. Next step: Iterative improvement over fall engagement activities

**Figure 2: Final Values Clusters**



### Draft values statements for further discussion by the campus community

1. **Partnership.** We will achieve our collective goals by working collaboratively across roles and disciplines and in partnership with local and global communities. Our deeply-rooted commitment to broad participation and engagement is central to our land-grant heritage and mission.
2. **Social justice.** We will be active in improving the human condition, promoting local and global citizenship and solving the world's major problems in the twenty-first century.
3. **Diversity, inclusion, and access.** We will nurture a campus culture that is equitable, accessible, and affordable and that embraces diverse ideas, backgrounds, and experiences. We will create environments that are welcoming and inclusive, and we will create structures that ensure equity.
4. **People first.** We will put people first. We will value and support the well-being of all students, staff, faculty, and the diverse communities with whom we work, with the well-being of those in less powerful positions taking precedence. We will strive for empathy toward others' thoughts, feelings, and experiences, listen with open minds, and use this understanding to guide our actions.
5. **Safety.** We will be transparent, open, safe, and responsive. We will be humble to hear new information. We will create physically and psychologically safe environments that empower everyone to thrive and do their best work. Our policies, procedures, and their execution will be clear, consistent, written, and will align with our values. Our decision-making will be inclusive and clear, so that people understand why and how decisions are made that impact them.
6. **Integrity.** We will hold ourselves accountable to the highest levels of integrity, honesty, trustworthiness, and dependability.
7. **Innovation.** We will solve the world's most pressing and intractable problems, generate new approaches, and help apply them to those who need them most. We will foster creativity, explore different paths, and find new directions. We will empower ourselves, our partners, and the leaders of the future to "advance knowledge and transform lives."
8. **Excellence.** We will hold ourselves to the highest standards of teaching, research, and engagement because our excellence makes a critical difference to the amount of good we can do.

## Optimal Scope and Scale of MSU Inquiry Group

### President's Initial Charge Questions Addressed by this Inquiry Group

1. How should MSU position itself for leadership and distinguish itself as a model, next-generation, land-grant institution?
2. How can we leverage our collective resources and anticipate society's evolving needs to establish cross-institutional priorities and initiatives?
3. What do the fourth industrial revolution and the new economy mean for MSU and those it serves?
4. How do we align our skills, incentives, and resources to create a plan to achieve our collective vision?

# Optimal Scope and Scale Inquiry Group Work Activities

- Developed a recommended process and approach to address the optimal scope and scale of MSU (students, course offerings, institutional partnerships)
- Identified and articulated foundational principles that should be considered and how these principles may change over time.
- Assessed secondary and tertiary implications of components- for example, the revenue impact of fewer students versus other gains expected from a smaller student footprint.
- Assessed and suggested processes for the development of partnerships with academic consortia, industry, government, and nonprofit organizations.
- Made recommendations of organization model(s) for consideration.

## Emerging Issues or Questions

- Decisions re: optimal scope and scale ultimately hinge on MSU's identify (land-grant, world-grant, multiversity) and core values. Who do we desire to serve? Why? How?
- How can MSU align its commitment to DEI and core values in planning and decision-making to strategically invest in the institution while mitigating unintended consequences?
- How can MSU become more intentional in the formation of a broad spectrum of learners to meet the demands of the 21<sup>st</sup> century workforce?
- How can an emphasis on innovation and technology lead to reinvention at MSU?
- To what degree is MSU open and willing to engage in critical conversations and work that it will entail for any realignment, contraction and/or consolidation of activities?
- Given the potential options, what are the best points for optimization at MSU?

## Proposed Directions

- *Multiple points of optimization* (enrollment, discipline mix, activity mix, instructional models and costs, etc.) means careful assessment of options and how they align with MSU's core values and land-grant mission.
- Continuous, inclusive and transparent process to assess priorities, practices, and activities.
- Need to focus on areas of excellence - *we cannot do everything equally well.*
- Need to intentionally assess decisions and examine them in terms of their benefits and costs. *Frame future and realign current decisions and practices using the lens of diversity, equity and inclusion.*
- Any decisions about partnerships need to be made using rigorous and transparent criteria.
- Need to explore new models of partnerships with academic, industry, government, and nonprofit organizations.
- *Rethink, restructure and rightsize* organizational model to meet 21<sup>st</sup> century needs.
- *Consider emerging models of college reinvention* - all emphasize innovation and technology.
- Ability to implement optimizing strategies tied to budget model and distributional processes.

## **Institutional Resources Focused Inquiry Group**

- Costs savings; including evaluation of outsourcing and PPP
- Revenue sources and limitations to and restrictions on those
- Common university budget models
  - Incremental Model, RCM, and others
- Suggestions on how to move forward with specific planning options

## Online Learning Focused Inquiry Group

- **What we've been working on:** The shape of an online strategy for MSU that is aligned with mission and attentive to a set of future-oriented dynamics such as institution size, reputation, and our market.
- **How:** Three focused groups on undergraduate, graduate, and “buy-build” issues focused on institutional capacity.

## Emerging Questions and Issues

In wrapping up, we are focused on these questions:

1. How should we position ourselves in the next 10 years relative to societal demand, government policy, and economic conditions?
2. Which markets can we thrive in and which will we leave to others?
3. What capabilities must we have **to run high-quality, highly-effective, and market-competitive online programs?**

# Observations of MSU to date

- **Values** are critically important to our identity.
- **Diversity, equity and inclusion** are foundational to our future, interweaving with all that we do.
- **Identity:** MSU's value is enhanced by both its land-grant history and D1 research trajectory - sometimes perceived as paradoxical, rather than recognized as our strength.
- **Students and Student Success:**
  - MSU's distinction is not defined by who we admit but by the composition and success of our graduates –from diminishing inequities in access, to increasing degree completion rates, to partnering for long term career development.
  - Recognition of a 60-year learning continuum that spans matriculation, through the entire career span and into retirement.
  - Online learning platforms will be a part of future; to be successful the university must clarify its online strategy
- **Research** - Investment in the Global Impact Initiative (GII) allowed MSU to hire more than 86 recognized scientists accelerating research growth and capacity. Next steps involve asking, “What are the problems of the future we are poised to answer?”
- **Communities and Outreach** - History of being in service to the communities of the state by understanding community needs and bringing forth solutions; often responding to inequities in education, health and environment. Future concepts may include 1) a reconciliation of what community entails at all levels: local, regional, state, national and international levels and 2) developing comprehensive outreach strategies by geographic location (e.g., Detroit strategy, Lansing strategy).
- **Institutional resources:**
  - Resource constriction, expected for the next 10 years, poses difficult decisions. Likely to accentuate dependence on tuition and enrollment strategies, potentially creating tension with values of equity and affordability. Without growth in revenue streams, investments in areas of excellence require some level of disinvestment as priorities are clarified. Clearly articulated priorities drive resource alignment, extending beyond finances to space allocation and internal systems (e.g., business, research, technology). Benchmarking needed to both optimize and resolve tensions between federated and central systems.
  - Budgetary models must be revisited – ideals include greater transparency and a closer link between funding, priority, and performance. A cautionary note to consider second order consequences of macro decisions such as an RCM model; models must be tweaked to accomplish goals for areas that cannot generate revenue or where a proxy is substituted for revenue.
  - Size and scope of the institution are closely linked to interplay among values, goals/priorities, desired impact and needed resources (mentioned above). Also consider MSU's relationship to other higher education institutions across the state.

# Discussion and questions

## Next Steps

- Engagement sessions, various audiences (November 2020)
  - Collect and analyze feedback from 25 sessions
- Framework overview (January - February 2021)
  - Coalesced from various inputs by framing groups
- Articulate strategic directions (January - May 2021)
- Documentation of process (November 2020 - May 2021)
- Recommendations for implementation (January - May 2021)

# Thank You!

Website:

<https://president.msu.edu/initiatives/strategicplan/index.html>

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