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Introduction

In the spring of 2010 the Board of Trustees for Lake Superior State University (LSSU) contracted with Traverse Management Resources, Inc. (TMR) to facilitate a process to renew the institution's strategic plan. The process was designed to result in a strategy that will address identified needs, accounts for economic drivers and realities, builds on successful initiatives, and supports the existing planning efforts of the Shared Governance Group and the LSSU Foundation.

The planning process resulted in agreement on a vision and strategy to ensure the LSSU continues to fulfill its mission and the expectations of its constituents. The vision and strategic priorities will provide a framework for budgeting, operational planning and for day-to-day decision-making.

The process goals were to create:

1. An experience that builds on existing strengths; unifies staff, Trustees and key stakeholders; builds relationships; and provides a positive, engaging collaborative opportunity.
2. A common understanding of data and perceptions related to LSSU and the people it serves.
3. A shared, practical vision of accomplishment for the next three years, and a strategy for action.
4. A framework to guide ongoing action planning, resource allocation, programming, planning, and decision-making.





Participants

Individuals representing a cross-section of stakeholders in the future of Lake Superior State University participated in the process to develop this strategy in a number of ways. The Office of the President coordinated the interviews, roundtables and planning retreat, working with the consultants to ensure broad representation and that diverse views were heard. The individuals listed below contributed their time and talent to the planning process. Without their commitment, resulting framework would not have been possible.

Board of Trustees

Douglas R. Bovin
James P. Curran
Cindy N. Dingell
Patrick K. Egan, Vice Chair
Jenny Kronk, Second Vice Chair
W.W. "Frenchie" LaJoie, Chair
Scot A. Lindemann
E. Gary Toffolo



Pre-Retreat Interviews

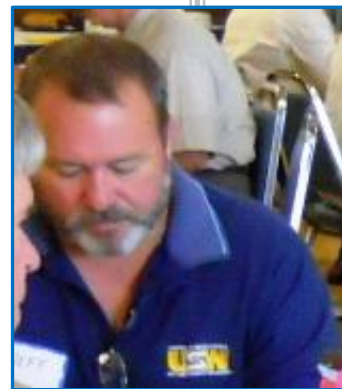
Tony Blose
Doug Bovin
Sherry Brooks
Mr. Tom Coates
James Curran
Kris Dunbar
Pat Egan
Bill Eilola
Kay Floyd
Jeff Harris
Jenny Kronk
W.W. "Frenchie" LaJoie
Scot Lindemann
Tony McLain
Cindy Merkel
Linda Schmitigal
Russ Searight
Gary Toffolo
Beverly White





Roundtable Attendees

Gary Balfantz
Allan Case
Peter Everson
Susan Fitzpatrick
Paige Gordier
Steven Gregory
Ken Hemming
Terry Heyns
Steve and Debbie Jones
Barbara Keller
James Moody
Bill Munsell
Leisa Mansfield
Valerie Phillips
Carolyn Rajewski
Linda Schmitigal
Russ Searight
Brian Snyder
Karizma Vance
Trisha Wells
Megan Rachelle Wickerham
Gregory Zimmerman
Kathy Clarady
Joe Barrs
Barbara Evans
Jon Coullard
Paul Trembley
Michelle Thalacker
Deb McPherson





Retreat Participants

Ramsey A'Ve
Colleen Barr
Kaye Batho
Doug Bovin
Sherry Brooks
Kathy Clarody
Tom Coates
Jim Curran
Ron DeLap
Cindy Dingell
Pat Egan
Deb Faust
Jeff Harris
Terry Heyns
Jenny Kronk
Frenchie LaJoie
Scot Lindemann
Tony McLain
Suzette Olson
Ken Peress
Linda Schmitigal
Russ Searight
Brian Snyder
Gary Toffolo
Magen Umlor
Karizma Vance
Morrie Walworth
Trisha Wells
Megan Rachelle Wickerham
Greg Zimmerman





A Strategic for Shared Success Lake Superior State University



The shared, practical vision for LSSU was developed with participation of thirty individuals who are representative of various stakeholder groups in a retreat setting.

The purpose of the Vision Statement is to describe the collective 'hopes and dreams' of those who have a stake in the future of the organization. The practical time period for this shared vision is the next three years. The vision serves as a motivating, compelling description of the desired future.

The Shared, Practical Vision

By 2014, Lake Superior State University will be recognized as a dynamic institution creating value for its students, community and region and demonstrating stewardship of its people, places and resources for long-term sustainability.

1. We envision a **collaborative, committed campus community** as evidenced by:
 - A culture of giving
 - Positive attitudes
 - Campus-wide Laker pride
2. We will achieve status as a **competitive, desirable school of choice for students and families** that attracts:
 - Increasing enrollment
 - An internationally diverse student body
3. We will build **bridges to and from the community** that create pride and prosperity for both and are seen in:
 - Collaboration with city and community organizations
 - Student programs that link academics with social responsibility
 - Strong ties with our community
4. We will develop **superior services and facilities for students** that are designed to respond to changing student needs such as:
 - Housing
 - Central gathering spaces
 - Support services and mentoring
 - Employment opportunities
5. We will offer **excellent programs that maximize regional assets and opportunities** as demonstrated by:
 - Integration of applied learning
 - Marketable degree and certificate programs
 - Showcase of best practices



“The initial step toward autonomy for those of us in organizations is to put into work the future we wish to create for our own unit.

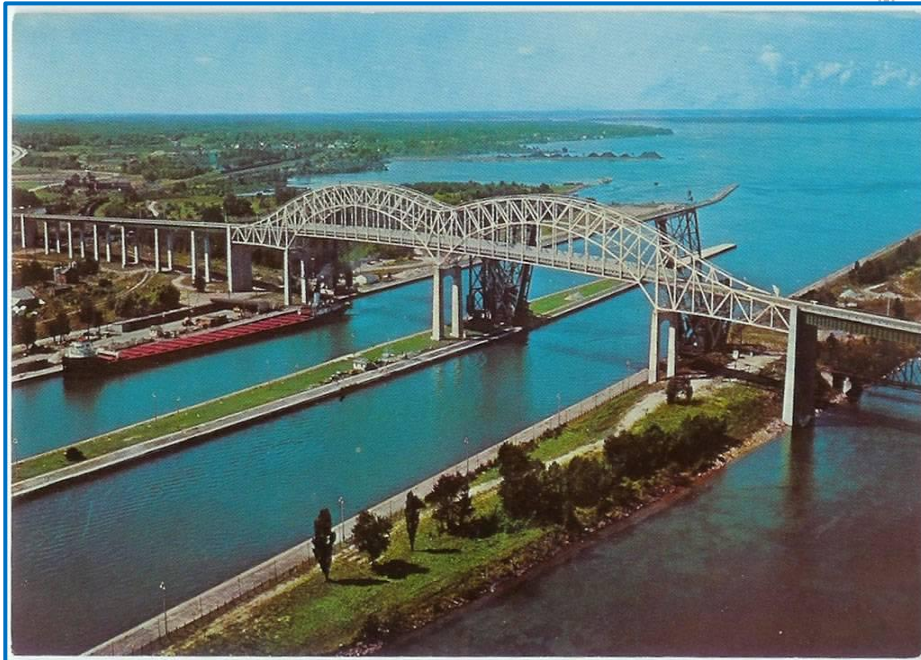
This is called a vision of greatness. We describe a preferred future that we are committing ourselves to and committing our unit to.

The belief is that this vision will be good for the individual, good for the unit, and good for the organization. Creating this vision is our essential act of leadership.”

Peter Block



6. Our students and faculty will have **high value, up-to-date educational resources** that support learning such as:
 - Technologies
 - Responsive, timely communications
 - Innovative living, learning opportunities
7. We will be positioned for long-term growth and sustainability with a **sound strategy for long-term financial stability** in place that:
 - Ties spending to priorities of a strategic plan
 - Forecasts and supports capital improvements
 - Leverages environmentally-friendly tactics



The underlying contradictions are the obstacles, barriers or roadblocks that may prevent realization of the vision. They are like boulders in the path, but, because they are so integrated into experience, they are not readily recognized for what they are. Contradictions are to be found in historic and societal trends, in images and attitudes, and in structures and patterns.

Unfocused Identity

- ### Imposed Systems Restrictions

- [illegible]

- Culture of been-there, done-that
- A kink in the idea sharing process
- Mistrust of leadership
- Tunnel vision
- Waiting for others to solve problems
- Not listening or receptive
- Inertia/inflexibility
- Complaints not supported by solutions/action
- Lack of incentives to effect change/growth



Winners/Losers Mentality

- Attitude
- Inability to see shared interests and benefits
- Academic arrogance/empire building
- Balkanization
- Lack of a collaborative culture
- Stakeholder buy-in (when a specific goal is necessary)

Limited External Support

- Short-term uncertainty
- Young and small alumni base
- State and Federal regulations
- Reliance on State appropriations and tuition

Location/Environment

- Changing demographics
- Perceived Yooper ability and cultures
- Local economy
- Location
- Strong competition – location, population
- Geography
- Resistance to change



The Strategy for Action

The following strategies provide broad directions for action over the next three years that will impact or overcome a contradiction and that will catalyze movement in the direction of the vision. The strategic directions act like a rudder. They orient organizations and people to a particular direction and help to focus change. Specific ideas for projects, programs, initiatives and action were generated during discussion and will be available to planning groups for further consideration.

Strategy: Developing Our Competitive Edge

Priorities for Action:

1. Infuse an environmentally-friendly, green approach
2. Develop and sell a distinctive experience
3. Create and offer programs and resources that appeal



Strategy: Taking Systemic, Deliberate Actions

Priorities for Action:

1. Make data-driven planning decisions
2. Align operations to support change
3. Build capacity for sustained quality and growth

Strategy: Building Visible, Productive Relationships

Priorities for Action:

1. Promote LSSU externally
2. Serve the community



Next Steps

Retreat participants developed the following outline of actions to ensure that momentum from the planning retreat would not be lost and that concrete action would follow. The Chair of the Shared Governance Strategic Planning Committee will assume leadership for working with the University Administration and Trustees to implement next steps and coordinate activities.

1. Organize for Action

- Create a guiding coalition made up of members of the July retreat planning group.
- Develop a plan for the Guiding Coalition to meet. Consider the feasibility of bi-monthly meetings with Trustees on Thursdays.
- Identify kinks in internal communication processes.
- Develop structure and process for accountability.
- Develop a timeline and detailed plans to follow-through with planning and implementation.



2. Commit to Leadership

- Figure out a way to make Trustees more visible and accessible to stakeholders.
- Individuals in leadership roles, including Trustees, will communicate and demonstrate support for the vision and plan





- Develop a way to demonstrate how everything fits together through Shared Governance.
- Create a sense of urgency to change.

3. Communicate the Strategy

- Write a final product in understandable, clear, direct language.
- Create a concise, compelling theme.
- Present the report as a unified coalition with a representative panel
 - Aim for August Convocation
 - Explain **where** we are going (Vision), **what** we are going to do (Strategic Directions and actions), **who** will have responsibility for what (Roles of groups, individuals), **when** they can expect something to happen, and **how** they will kept informed
- Celebrate small steps, accomplishments.





Context for Planning

In preparation for the planning retreat, TMR prepared a third-party overview of the current context for planning. To prepare this overview, TMR gathered historical and perceptual data through processes that included:

1. Review of background documents including surveys, studies, reports, and previous plans.
2. Face-to-face individual interviews with members of the Board of Trustees, the President and Cabinet, additional constituents including the Chair and members of the Shared Governance Group, and the Foundation Board.
3. Roundtable discussion groups (3) with staff, students, previous students, and other individuals who responded to the invitation to participate.
4. Review of research on challenges facing small universities and models of successful initiatives to increase enrollment and financial sustainability.

Organizational strengths, challenges and strategic issues listed below arose from the data-gathering process and were presented to the group for discussion.

Organizational Strengths

- Academics
- Special Programs, i.e. Nursing, Fire Sciences, Environmental Sciences
- Services to the community
- Learning Center
- Quality people
- Shared Governance process
- Personal commitment to students
- Successful Alumni



Organizational Challenges

- Economic conditions in the State of Michigan and region
- University finances
- Enrollment trends, unique student groups
- Other institutions in the region and understanding their roles
- Partnerships and collaboration
- Student-as-customer focus is not universally accepted
- Lack of public awareness
- Organizational culture is reflection of the past
- Vision and leadership have not been clear or unified

Strategic Issues

Market Position:

- The role of LSSU in the region, community, state and national education system
- How to leverage the Community College function
- What the relationship to other institutions should be, and how to differentiate LSSU
- How to leverage LSSU's unique learning opportunities and create niche excellence
- Need to build connectivity to k-12 education, employment opportunities, and community and regional needs
- The identity and branding of LSSU is inconsistent and does not adequately convey existing areas of excellence, support recruiting efforts, build public awareness, or create community pride

Campus:

- Facility upgrades and planning including student housing, learning spaces and classroom facilities, use of existing buildings
- Need to move toward student-centered scheduling, and to create an appealing campus life
- What the role of regional centers should be, and if they should exist



- How to incorporate appropriate data in decision-making on facility issues

Program Offerings:

- How to maintain academic excellence in all areas when demand is declining
- Incorporating associates degrees, credentialing programs to match employment opportunities, meet regional needs, and create revenue.
- How to phase out outdated, low enrollment, expensive offerings
- How to create future-focused, high demand opportunities i.e. Wind Energy, Chinese
- How to incorporate distance education
- Defining the appropriate role of athletics
- The need to provide quality academic advising, support and placement services

Organizational Culture and Strategy:

- Organizational relationships are stressed from multiple reorganizations, and leadership changes
- Trustee involvement is highly valued by constituent groups who want to see more
- Professional expectations have been inconsistent creating perceived inequities and low morale among some faculty and staff
- Communication channels and decision-making processes are unclear
- Uncertainty of commitment to follow-through on current planning commitments
- Leadership development is desired at all levels
- Lack of clarity between mission and vision statements
- Need bold, motivating, unifying vision to drive future identity, planning and to motivate all stakeholders to support and participate in improvement efforts