

Concordia University, Nebraska

Strategic Plan 2009-2015

Overview

The development process and organizational summary

Mission: Concordia University, Nebraska is an excellent academic and Christ-centered community equipping men and women for lives of learning, service and leadership in the church and world.

Vision: By 2015 Concordia University, Nebraska will grow and expand its influence to diverse populations by fostering collaboration and adapting to our changing environment while remaining faithful to our mission of excellent Christian education.

Contents:

	page
Introduction	3
The Planning Process	4
The Core Planning Team	4
The Advisory Planning Team	6
The Presidential Advisory Group	7
Campus Input	7
Outcomes	8
Values	9
Mission	10
Vision	10
The Management Process	11
Imperative Teams	13
Strategic Plan Management Team	14
Goal design and implementation	15
Evaluation	16
Appendix	20
Artifact A Core Planning Team Member Job Description	
Artifact B Advisory Planning Team Member Job Description	
Artifact C Strategic Plan Management Model	
Artifact D Imperative Area Manager Job Description	
Artifact E Imperative Area Team Member Job Description	
Artifact F Vision Statement Criteria	
Artifact G Exchange Imperative Area Characteristics	
Artifact H Nurture Imperative Area Characteristics	
Artifact I Exchange Imperative Area Characteristics	
Artifact J Systems and Norms Imperative Area Characteristics	
Artifact K Strategic Plan Management Team Design	
Artifact L Goal/Action Plan Submittal Form	
Artifact M Approved Goal (Sample)	
Artifact N Imperative Area Evaluation Procedures	
Artifact O Imperative Area Evaluation/Nurture	
Artifact P Imperative Area Evaluation/Resources	
Artifact Q Imperative Area Evaluation/Systems and Norms	
Artifact R Imperative Area Evaluation/Exchange	
Artifact S Goal Evaluation Form	
Artifact T Imperative Area Review Request Form	
Artifact U Imperative Area Review Request Sample	

Introduction

“Strategic planning” has been a concept that has received much attention by institutional administrators for at least the past three or four decades. In higher education, strategic planning processes have been influenced by a need to align internal institutional directives (espoused and owned) with external realities, some of which may seem to be at odds with an institution’s values and perceived purpose. This perceived conflict of priorities, combined with a general malaise that affects most individuals when considering strategic planning, has resulted in much effort in planning but few results in implementing.

Concordia has faced these realities in past years. Our rural location and tradition of finding success in focusing primarily on traditional aged, full time, residential, church work students, has shaped our perceptions of how to plan strategically. External data points to a need to consider a way to respond to the many changes that are now impacting all higher educational institutions. Realities such as a decrease in LCMS students pursuing church careers, the increase of non-traditional commuter students, the increase of distance learning options, increasing competition from for-profit colleges and universities, decreased financial support from our church body and an ever-growing list of other variables leads administrators with the question of how to respond while still retaining our identity and vitality.

The last strategic plan was to have been “completed” in 2006 (although there was an addendum to the original plan that extended some of the goals until 2008). The development of this plan was facilitated by an outside consultant. While it would be accurate to say that institutional administrators did focus considerable energies on the goals and objectives of the plan, most of the goals went unachieved and most of the campus community remained blissfully ignorant of the central goals of the plan – choosing instead to keep doing what they had been doing until told otherwise.

While considerable energies were devoted to development of a new mission and vision statement for the institution, we chose to spend more energy on devising a method to implement the achievement of our mission and vision in a way that would better facilitate successfully achieving both by 2015.

The Planning Process

The design phase began in 2008 and was completed in 2009. One of the philosophical foundations to the design phase was to involve as many constituents in the process as possible.

Concordia is blessed with many stakeholders who are keenly aware of the nuances of higher education and are also committed to the institution's mission and ministry. These insightful individuals can be found at all levels of our constituents – faculty, staff, professional-technical, students, alumni, Board of Regents members, community collaborators, and others. Our goal was to connect with a representative sample of individuals from many of these levels.

For the sake of the process, we had specific definitions of the concepts of mission, vision and values that drove our development process.

- Values – These are those foundational pillars that are infused in everything that an institution does. While values are generally static, an institution needs to continually review its actions to make certain that they are consistent with the values it espouses. The mission and vision must not articulate perspectives of the institution's agenda that are inconsistent with the institutional values.
- Mission – The mission identifies the key purpose for an institution's existence. A mission statement may change very little over the years, varying only in how it presents its message to a changing demographic, while remaining true to the institutional purpose.
- Vision – The vision represents a specific way that an institution intends to respond to a specific set of circumstances. The vision must ultimately aim at achieving the mission of the institution, but it allows the institution to target its resources in such a way as to most effectively achieve the mission.

The Core Planning Team (CPT)

Early in the process, nine individuals were given the task of laying the groundwork for the development of a new mission and vision. The team met at least monthly and worked first on determining the assumptions of the external circumstances that would most likely influence the implementation of our vision.

Team members were made of individuals who met the following criteria:

- An understanding of CUNE's current mission
- A basic understanding of CUNE's history
- Experience in team work
- Innovative thinking skills
- A dedication to carrying out the work of the church through CUNE's ministry

(taken from the Core Planning Team Member Job Description – Artifact A)

The individuals chosen for the CPT, and their role or affiliation with CUNE at the time of assignment, included:

- The Rev. Dr. Brian Friedrich – President of CUNE
- Dr. Jenny Mueller-Roebke – Provost of CUNE
- Mr. Tim Moll – Seward community leader and member of the Board of Regents of CUNE
- Dr. Kent Einspahr – Faculty member, Sciences Department Chair
- Ms. Kristy Plander – CUNE Marketing and Communication Director
- Dr. Lisa Ashby – Faculty member, English Department Chair
- Mr. Mark Kolterman – Seward community leader, Concordia Foundation member
- Mr. Dennis Scheer – Concordia Foundation member
- Dr. Mark Blanke – Associate Provost, Director of Strategic Planning, faculty member

Using data from research related to trends in higher education, sample strategic plans from other institutions, input from retired and former university presidents, input from faculty and staff, the Board of Regents and the Concordia Foundation, as well as a review of themes related to change in academic and non-academic institutions, the CPT put together the framework for our revision of the mission and vision for CUNE. As change themes were identified and drafts of mission and vision statements were developed, the concepts were reviewed by the Advisory Planning Team, faculty, Board of Regents and Concordia Foundation.

The CPT developed the following goals for itself:

To produce a strategic plan that:

- is an accessible, functional document owned by our stakeholders,
- responds to challenges and opportunities in a way that inspires action,
- clearly directs future resource allocation, and
- allows Concordia to serve more effectively the church and world through its distinctive mission.

The CPT concluded their work once the values, mission, and vision statements had been approved by the Board of Regents.

The Advisory Planning Team (APT)

The APT served as a sounding board to diminish the potential for groupthink among CPT members and to enhance the input from a broader base of constituents than was possible within the CPT.

The APT's overall goals were identified as the following:

- Become more familiar with the management model
 - Review common themes needed in mission and vision
 - Finalize a Vision Statement draft for presentation to faculty and the Board of Regents
 - Visit values for revisions
- (taken from the Advisory Planning Team Member Job Description – Artifact B)

The participants in the APT consisted of the members of the CPT as well as the following additional members along with their particular role at the time the group was meeting:

- Ms. Janet Baldwin – Operations Manger for Student Financial Services at CUNE
- Dr. Jack Duensing – CUNE Emeriti Professor
- Mr. Marty Kohlwey – Director of Student Life at CUNE
- Ms. Susan Mayberger – ESL Supervisor for Omaha Public Schools
- Mr. Dennis Meyer – Concordia Foundation Member, member of the LCMS Board for University Education
- Mr. Lyle Middendorf – Parent of an alumnus
- Mr. Matt Steuber – Lutheran school principal
- Mr. Michael Strand – faculty member, chair of the Art Department
- Mr. Del Toebben – Member of the Concordia Foundation, was instrumental in development of the previous strategic plan

Ex officio members:

- Mr. Pete Kenow – VP for Institutional Advancement
- Mr. David Kumm – VP for Finance and Operations, CFO
- Mr. Scott SeEVERS – VP for Enrollment Management

The APT met several times to review the work done by the CPT and to process the summary material outlining the feedback of the constituencies. Feedback from the APT was used to provide substantiation and focus for future work of the CPT and enhanced focus for additional feedback from other institutional constituencies.

The APT concluded its service when the Board of Regents approved the mission and vision statements.

The Presidential Advisory Group

CUNE is blessed to have access to five emeriti presidents of higher education institutions. These individuals were kind enough to provide insightful comments at three key times in the mission/vision development process. Their comments served to enhance the understanding that the working groups had of the nuances associated with the development of a mission and vision that would truly guide the actions of the institution's leadership in implementing strategic planning. The involvement of Concordia's president, Rev. Dr. Brian Friedrich, as a member of the Core Planning Team and the Advisory Planning Team was instrumental in enhancing the understanding of the issues faced by senior administrators in higher education. The views of these leaders were invaluable in the development of the new mission and vision.

These were the individuals who provided this additional feedback for our process:

Rev. Dr. John Buuck – Past president of Concordia University, Wisconsin –
Mequon, Wisconsin

Rev. Dr. Alan Haare – Past president of Valparaiso University – Valparaiso,
Indiana

Rev. Dr. George Heider – Past president of Concordia University, River Forest
(now Concordia University, Chicago) – River Forest, Illinois

Dr. Ralph Reinke – Past president of Concordia University, Nebraska –
Seward, Nebraska

Rev. Dr. Orville Walz – Past president of Concordia University, Nebraska –
Seward, Nebraska

Campus input

The planners of the new strategic plan sought to develop a collaborative model for strategic planning. A key resource used during several steps of the process was the book Collaborative strategic planning in higher education by Patrick Sanaghan. Significant efforts were made to increase transparency and involve key stakeholders in the development of the mission and vision and in the subsequent management process.

Data had been collected from students regarding the previous mission and vision statements. Indications were that a significant portion of the student population did not resonate with the existing mission statement. Comments were made that the statements seemed to be designed for marketing purposes and weren't owned by the student body.

Significant input was received from faculty, staff, the President's Cabinet, directors of the Concordia Foundation and members of the Board of Regents. Each stage of the process provided at least one opportunity for input from each group.

Outcomes

Input from the CPT, APT, key stakeholders, presidential advisors and external sources pointed to some significant trends in higher education. Some of these trends were applicable to higher education in general and some were specific to Lutheran higher education. The trends/presuppositions were interpreted through the use of outside resources, faculty and Professional-Technical input, insights provided by the CPT and APT, and from the Presidential Advisory Group. The trends or operational assumptions that were identified included:

- Increased demographic shifts – racial/cultural, aging, shrinking LCMS numbers
- Demographic changes could have an effect on recruiting faculty
- There are ever-increasing costs in higher education
- There will be an increase of outside accountability groups (government, accreditation...)
- We are seeing an increase of multi-site universities
- There is an increased focus on collaborations
- We can expect increases in the use of technology
- There is a need for institutional distinctiveness to increase marketability
- Even “strong” LCMS schools (elem. sec.) are seeing a smaller LCMS population
- New, participative learners need changes in educational methodology
- It is an obsolete model to assume that higher education provides information that learners can't get elsewhere
- Shifts in content delivery and institutional support needs to be made to accommodate the technologically-integrated nature of today's college students
- Junior colleges are accommodating learning styles and needs better than many 4-year institutions, especially for ethnic learners
- The U.S. is aging and the ministry needs of older adults need to be met
- A “global connectedness” is a present reality and our learners (and faculty) need to be able to effectively access that global community
- Critical thinking skills are needed by learners – skills which will help individuals to innovate
- There will be less focus on “the college degree” and more focus on developing adaptive skills.
- Strong values remain attractive to today's learners, but articulating these values, while appealing to some, will alienate others
- The need for community is constant

We also identified non-negotiables that need to be retained or which will remain the same in the future and so should be seen as a part of our identity throughout the strategic planning process. These were:

- We will continue to prepare “church workers”
- We will seek to nurture the faith of our students
- We will remain explicitly Lutheran and Christian
- An affective sense of community is at our core
- We focus on a liberal arts education

- We are a part of the LCMS
- We will have a Christian faculty

Several drafts of vision and mission statements that we felt were responsive to these trends and non-negotiables were generated and input was solicited from as broad a constituency as possible. There was consensus that the values that had been developed in the previous strategic planning process still fit our understanding of the institution's foundational underpinnings.

The operational perspective that we used when considering the strategic guidance from the mission and vision statements was that a mission statement defines the central purpose for the organization's existence. A mission statement must certainly be revisited on a regular basis to determine if it is stated in such a way as to accurately represent the institution's purpose to stakeholders, but the central components of the mission will change little over the years. In addition, the mission must not identify a purpose that is inconsistent with the institutional values. Concordia was founded in 1894 and the mission has stayed very consistent, although it has been edited from time to time to better relate the mission to different audiences.

The vision statement articulates a specific plan for a specific place at a specific time. The statement must represent how the institution will focus its energies and resources in ways that will most effectively achieve the mission. The vision can be quite fluid and is apt to change frequently based upon external factors that influence the institution's ability to achieve its mission. It is important for the vision to remain consistent with the missional purpose of the institution. The vision must be responsive to the trends influencing higher education while remaining faithful to the institution's history and culture. Achieving the vision becomes the "strategic plan" to most effectively accomplish the mission.

The values that we retain from the previous strategic planning process are:

- **Christ-centered learning environment**
Demonstrating out commitment to one another in love by nurturing mind, body, soul and spirit through faith in Jesus Christ our Savior and Lord
- **Partnerships**
Recognizing the inherent strength of shared objectives and working in deliberate and intentional ways to fulfill our vision
- **A spirit of community**
Acknowledging and celebrating the influence and presence of the Holy Spirit in and on the lives and collective accomplishments that unite us as members of the Concordia family
- **Excellence**
Striving for the highest levels of performance in all that we do and, in so doing, achieving a reputation of excellence
- **Service**
Focusing intentionally on understanding and satisfying the needs of those we serve with integrity and humility

The mission statement that was accepted and approved by the Board of Regents in July of 2009 is:

Concordia University, Nebraska is an excellent academic and Christ-centered community equipping men and women for lives of learning, service and leadership in the church and world.

The approved vision statement is:

By 2015 Concordia University, Nebraska will grow and expand its influence to diverse populations by fostering collaboration and adapting to our changing environment while remaining faithful to our mission of excellent Christian education.

The Management Process

Many strategic planning processes end the planning stage with a long list of goals, objectives and tactics for achieving the vision/mission. Each goal is usually assigned to an administrator to oversee its completion. While it is possible to achieve an institutional vision using this method, a more common outcome is a slow slide from activity towards inactivity and from relevance to irrelevance.

The strategic process at many institutions moves towards atrophy the further you get from the end of the planning process. Management of the plan is more critical to achieving the vision than is evident through many institutions. As internal and external variables change, as clarity regarding the intended purpose for the various goals starts to fade, and as champions for certain goals move on or change positions, the achievement of missional goals becomes less and less likely. In addition, our new vision statement elevated the importance of being adaptive to the many changes that will likely affect higher education over the next six years of the strategic management process, we felt that it would be incongruent to advocate adaptability and yet rely on a system that set goals for a future that one couldn't possibly anticipate.

In order to overcome these common obstacles to the strategic management process, we elected to develop a strategic management process which would be fluid and allow for innovation and repositioning throughout the term of the implementation of the strategic plan. The overriding caveat in the development of goals was merely that they had to be initiated through the desire to better accomplish the newly-developed vision.

For this new process to proceed effectively, we needed to develop a system that allowed for the ongoing development of goals and the checks and balances that would increase the probability that these goals would be reached. Implementation of new goals usually requires the allocation of resources (time, money, facilities...) and on the CUNE campus, the responsibility of resource allocation falls on the members of the President's Cabinet. All of the Cabinet members had participated on either the Core Planning Team or Advisory Planning Team and so were aware of the direction that the vision was seeking to take the institution. It was important therefore, that the management model involve the Cabinet members in a significant way.

Cabinet members expend a great amount of energy and time in just managing the day-to-day operations of the institution. For a strategic plan to be managed

effectively, there is a need to have individuals who can expend energy specifically towards those issues that will help to facilitate the vision of the institution. For that reason, the management process sought to include individuals who could focus adequate time and energy into the dynamics of specific institutional areas as they relate to the vision. The CPT defined four areas that they felt encompassed all aspects of the institution. These four areas were defined as the “Imperative Areas” and were developed after a thorough review of recommendations from the Higher Learning Commission’s “Institutional Accreditation: An Overview” and the Middle States Commission on Higher Education’s “Characteristics of Excellence in Higher Education.” Imperatives were defined as “the comprehensive components of CUNE’s operations that, if managed holistically and in a unified manner, will ultimately facilitate the successful achievement of the institutional vision.” The four Imperative Areas and their descriptions are:

Imperative #1 – Resources. Components of this imperative area will focus on the *acquisition and allocation* of physical resources at CUNE.

Included in, but not exclusive to, this imperative area -

- Fiscal – Fundraising efforts, endowments, gifts and grants, new donors
- Facilities – Classrooms, library, dorms, office spaces, public spaces
- Other – Technology

Imperative #2 – Nurture. In this imperative area we will focus on how we *grow, manage and value* the human assets with which we are engaged.

Included in, but not exclusive to, this imperative area -

- Relationships – Alumni, Seward community, student-faculty, student-student, donors, influencers
- Community – Sports, clubs, intramurals, arts & humanities, spiritual “health”
- Human Resources – Health and wellness, salaries, benefits, professional growth, staffing management

Imperative #3 – Exchange. Our efforts in this imperative will focus on *learning, teaching, sharing, partnering and collaborating*.

Included in, but not exclusive to, this imperative area -

- Curricular – Programs, General Education, library services, assessment
- Partnerships – LCMS, OPS, KTA, CUNE Institutes, Seward Public Schools, ALSS, LEA, CUS, St. John Lutheran Church, new partnership groups, Lutheran schools & churches
- Promotion – Marketing, Publications

Imperative #4 – Systems and norms. Our focus in this imperative is to *develop and enhance* those processes that enable us to achieve our mission most effectively. Our focus in this imperative is to review existing processes and develop new processes as necessary to eliminate obstacles to achieving our vision.

Included in, but not exclusive to, this imperative area -

- Formal – Policy manuals, decision-making structures, accreditations, leadership, governance
- Informal – Institutional climate/culture, operational norms, informal power-brokers (stakeholders, gate-keepers, etc.)

A visual model of these four imperative areas and their relative place as relates to the values, mission and vision of Concordia can be found in the Appendix as “Artifact C.”

Imperative Teams

Individuals were chosen to serve as “Imperative Team Managers” (IAM) and had the responsibility of assembling a team and working together with that team to develop goals and action plans to help facilitate the achievement of the vision by aligning those issues associated with their imperative area in such a way as to best facilitate achieving the vision (see the IAM job description in the Appendix – Artifact D). Teams were to be made up of faculty, staff and professional-technical employees. (See the IA Team Member job description in the Appendix – Artifact E.)

The Imperative Area Teams at the start of the management process were:

Resources:

Dr. Brent Royuk – IAM
Dr. John Jurchen
Mr. Lon Jungemann
Mr. Curt Sherman

Exchange:

Dr. Thad Warren – IAM
Dr. Nancy Elwell
Mr. Phil Hendrickson
Ms. Sue Jensen
Dr. Janell Uffelman

Nurture:

Ms. Angela Muller – IAM
Ms. Cindy Greene
Rev. Terry Groth
Rev. Ryan Matthias
Mr. Vance Winter
Ms. Kimbrie Vlach

Systems and Norms:

Dr. Rob Herman – IAM
Ms. Janet Baldwin
Dr. Kent Einspahr
Dr. Kevin Kohnke
Mr. Bill Schranz

The use of these teams helped to expand the leadership network beyond the cabinet – especially in areas specifically related to fulfilling the institutional vision. It also allowed the teams to serve as advocates for the development of their imperative area,

a role that Cabinet members would have found difficult, since Cabinet members' responsibilities cross several of the Imperative areas and because Cabinet members have the responsibility of managing all areas of institutional operations, of which strategic management may only make up 10-15% of overall activity. The large work load Cabinet members must manage on a daily basis can diminish the ability to be proactive in the development of one or more imperative areas to better align with the institutional vision.

Imperative teams were given a list of criteria that identified the key components of the vision that they were to seek to accomplish (see "Artifact F" in the Appendix for a listing of the criteria and a short explanation of each.) The teams were instructed to identify the characteristics, unique to their area, which would describe an imperative area that was aligned in such a way as to achieve the institutional vision. The characteristics serve as the standards on which the quarterly evaluations will be assessed. Please refer to Artifacts G-J in the Appendix for a listing of the characteristics for each imperative area.

With the development of the characteristics, the imperative area teams have developed a picture of a hoped-for future relative to their imperative area. For the remainder of the strategic management process, they will work to develop those goals that they feel will best develop these characteristics within their area. One of the benefits of this process is that allows the development of goals to be fluid enough to respond to the ever-changing landscape of higher education in the 21st century.

Strategic Plan Management Team (SPMT)

It was vitally important to develop some decision-making system that would unify the efforts of the imperative teams and bring them together with the ongoing efforts of the institution's administrative team. The solution for this need was found in the development of the Strategic Plan Management Team (SPMT).

The SPMT is the team that reviews all goals presented by the imperative area managers. The SPMT can respond to a proposed goal by accepting it, sending it back for revisions, or by rejecting it. The IAMs have the responsibility to innovate (done with their teams by developing goals to propose to the SPMT), advocate (done when the IAM presents the case for the goal to the SPMT) and evaluate the progress on the goal.

The SPMT is made up of the four IAMs, the members of the President's Cabinet, the Director for Strategic Planning, and the deans of the university. The makeup of the team is intended to make certain that all strategic actions align with institutional efforts in other areas. It is hoped that the SPMT members will develop an understanding of how new strategic goals might be capable of aligning with existing

institutional goals in a way that will economize on institutional resources and diminish duplication of efforts.

The ongoing use of the SPMT throughout the entirety of the strategic plan timeline will allow the team to be more adaptive to changes and responsive to the outcomes from previously completed goals. In addition to being unable to respond to the unforeseen variables external to the university, a strategic plan that plots the goals at one point near the beginning of the process will have a difficult time reacting to the potential impacts of the goals as they are being met (or, when they fail to be met.) The SPMT allows the opportunity to involve all of the key leadership in modifying the goals to best achieve the vision, even as the internal and external variables change.

Goal design and implementation

Imperative to the SPMT's work was the need to have a standardized and clearly-defined method for submitting goals for approval. Since the success of the strategic plan management process hinges on the effective and ongoing development of goals and their successful implementation, the process for selecting and approving goals needed to have buy-in from the leadership of the university and those who manage the strategic planning.

IAMs have the responsibility to innovate the goals that aim to achieve the institutional vision, and the imperative area teams are structured to have the greatest understanding of how well their imperative areas align towards helping to achieve the vision. We did not seek to change the institutional authority structure, so the IAMs do not have the ability to dictate that a goal should be accomplished. Instead, an IAM would advocate to the SPMT for the goal to be approved and assigned. There had to be a rationale for why the goal was needed and all of the SPMT members had the opportunity to assess the degree to which they felt the goal was needed and, to determine what resources would be best directed towards this particular goal.

When CUNE began its strategic planning process we were in the midst of a fiscal crisis. Budgets had been frozen or cut, faculty, staff and administrators had taken cuts in salaries and there had been some reductions in force. IAMs were keenly aware of the pressure that these realities placed upon their goal-setting process. If we had done all of our goal-setting at the start of the planning process, our goal development would have been impacted by our present operational conditions. With an ongoing goal development process we are able to make appropriate adjustments for fiscal matters, but the development of future goals will be able to be modified to best fit the nuances that might impact our ability to achieve certain goals at certain times.

Imperative area teams review the conditions of those factors that influence their imperative area. They assess these conditions in light of the characteristics that they

identified for their imperative area. When deficiencies are identified, they work to develop a goal or goals to diminish the deficiencies. The goals are outlined on the “Goal/Action Plan Submittal Form” (see the Appendix, Artifact L) along with the action plans (objectives) that relate to achieving the goal. These forms are submitted to the SPMT. The IAMs have the responsibility to advocate for the plan they have submitted. The SPMT considers the goal’s resource needs, the importance of the goal in achieving the vision, and the data that supports the need for the goal. Finally, the SPMT decides whether to approve the goal, send it back to the imperative area team for revisions, or to reject it. If the SPMT approves the goal, it is assigned to a Cabinet member or members to oversee its completion. This method allows the process to operate under the institutional systems that are already designed for oversight and resource allocation.

In addition, the goal development process can be initiated from others and directed towards an imperative area team. A form was developed (see Artifacts T and U in the Appendix) to facilitate an individual’s ability to suggest a review of a certain issue by an imperative team. If the review is approved by the SPMT, the imperative team will determine if the request warrants the development of a goal. Rightly administered, this process will decrease the potential that an imperative team is operating with biases that may limit the scope of their goal development.

One of the components of the vision statement was that we were to become more adaptive as an organization. One characteristic of adaptive organizations are that they structure themselves in such a way as to intentionally involve frontline workers in ways that allow them to innovate and influence change. This goal setting process does precisely that – moves rank and file employees into roles where they can review institutional practices and formally recommend methods to improve the operations of that institution. The involvement of the SPMT in general and the President’s Cabinet in particular, provides oversight to the process.

The first goal was submitted by the Nurture Imperative Team (see Appendix, Artifact M) at the second meeting of the SPMT. After discussion, the SPMT approved the goal. The content of the goal led the SPMT to believe that the President of the University was the most appropriate individual to oversee implementation of the goal. At every subsequent SPMT meeting, additional goals have been submitted and approved. As of this writing, we are too early in the process to have had any goals fully completed.

Evaluation

Ongoing evaluation is critical to a successful strategic management process. Evaluation needs to be placed on three foci – the implementation of the approved goals, the impact of the goals on the institution’s ability to achieve the vision, and the

degree to which the vision remains valid to the institution's success. At the time of this writing, we are still too early into the strategic management process to determine the outcomes of the three evaluative foci, but the management process has put procedures in place to help facilitate an intentional process.

The third role of the IAMs (to innovate and to advocate being the first two) is to evaluate. IAMs do not have a place in the institutional hierarchy that allows them to direct the activities of the members of the President's Cabinet. The IAMs are not expected to encourage, extol, direct or admonish Cabinet members who have been assigned oversight of goals. Cabinet members are responsible to the President of the university and through him to the Board of Regents. The IAMs have been assigned the responsibility of overseeing the alignment of specific imperative areas with the institutional vision – which was approved by the Board of Regents. The IAMs achieve their evaluative role by reporting directly to the Board of Regents. They report on the progress the Cabinet member(s) have had in achieving the goals assigned to them and they report on the overall alignment of their imperative area with the achievement of the institutional vision. The characteristics that the imperative area teams have identified serve as the evaluative matrix.

There may indeed be instances when a goal cannot be accomplished as intended, or when the focus needs to be shifted from one imperative area to another. Changes in priorities or resources should be allowed the opportunity to influence the vision implementation process. Using the evaluative role of the IAMs, the Board of Regents can view the strategic management process as a whole and can interpret the implications of the evaluations of the IAMs. The Board may decide to accept an incomplete goal or a deficiency within an imperative area as an institutional necessity or, the Board may determine that a Cabinet member must redirect his or her resources in such a way as to make the goal a more significant priority. With this management model, the process is managed in such a way as to align with existing administrative systems while allowing for the infusion of additional innovation.

Formal evaluative processes are aligned with the quarterly meetings of the Board of Regents. IAMs are expected to update their assessment of each imperative characteristic for Board review. The overriding assumption is that the goals that have been recommended and implemented are intended to improve the capacity of the characteristics to make the vision readily achievable. If a goal has been implemented or is being implemented and it is determined that the characteristic that the goal was attempting to enhance is not experiencing alignment, it may be determined that diminishing resources towards that specific goal would be warranted. This process has the potential to optimize resource allocation towards those actions which have the greatest potential to enhance the achievement of the vision (see Artifact N for the evaluation procedures and Artifacts O through R for the forms used for each imperative area.)

The evaluation process had to take a standardized format to accommodate the process of reporting to the Board. A format was proposed which fit some of the assessment parameters that were already used for reporting to the Board, one which made use of a “red light, yellow light, green light” criterion. Additionally, IAMs were able to assess each characteristic of their imperative area using a 1-10 Likert scale.

The preceding evaluations provide a macro view of the progress on the alignment of the imperative areas with the vision. The IAMs also have the responsibility to assess the degree to which the goals that they submitted, and which were assigned by the SPMT to a Cabinet member or members, are being accomplished. This micro evaluation has been touched upon earlier in this section and its format is included in Artifact S.

These micro and macro evaluations allow the Board ample data to make determinations on how to best allocate future resources so that the vision can be accomplished. Every institution has the need to prioritize resource allocations; this evaluative process is designed to maximize the input from the “front line” personnel while still facilitating informed decision-making from the appropriate leadership.

Prior strategic plans have resulted in long “to do” lists that often seem too ambitious or become outdated rapidly after they are developed. The evaluative process allows for Board members to review the status of the entire campus relative to the achievement of the vision. The process works within the approved structures of the institution to allow for prioritization and continual realignment.

Appendix

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Artifact F	Vision Statement Criteria
Artifact G	Exchange Imperative Area Characteristics
Artifact H	Nurture Imperative Area Characteristics
Artifact I	Exchange Imperative Area Characteristics
Artifact J	Systems and Norms Imperative Area Characteristics
Artifact K	Strategic Plan Management Team Design
Artifact L	Goal/Action Plan Submittal Form
Artifact M	Approved Goal (Sample)
Artifact N	Imperative Area Evaluation Procedures
Artifact O	Imperative Area Evaluation/Nurture
Artifact P	Imperative Area Evaluation/Resources
Artifact Q	Imperative Area Evaluation/Systems and Norms
Artifact R	Imperative Area Evaluation/Exchange
Artifact S	Goal Evaluation Form
Artifact T	Imperative Area Review Request Form
Artifact U	Imperative Area Review Request Sample

Artifact A: Core Planning Team Member Job description

Core Planning Team (CPT) –

Mission: The CPT is primarily responsible for the development and initial delivery of the 2015 Strategic Plan.

Time Commitment: One year of monthly meetings (@ 2 hours each month – longer during quarterly meetings) and frequent emails requiring responses.

Job Description:

Qualifications – CPT members should possess the following characteristics:

- An understanding of CUNE's current mission
- A basic understanding of CUNE's history
- Experience in team work
- Innovative thinking skills
- A dedication to carrying out the work of the church through CUNE's ministry

Responsibilities – CPT members will need to carry out the following tasks:

- Work to help develop a comprehensive strategic plan that will direct the efforts of CUNE for the next 6 years
- Define methods to best develop ownership of the strategic plan among the key constituents of CUNE
- Attend monthly meetings – most often on the CUNE campus
- Provide insights and feedback regarding future trends in higher education and assess how those trends may affect CUNE in carrying out its mission
- Respond to planning-related emails in a timely fashion
- Review related materials as assigned
- Manage assignments as agreed upon

Responsible to: CPT members are immediately responsible to the Director of Strategic Planning and through him to the University President

Evaluation: CPT members may be asked to assess themselves during the year relative to the degree to which they are achieving their stated responsibilities. Final evaluation will be based on the successful completion of the stated mission of the core planning team.

Artifact B: Advisory Planning Team Member Job Description

Advisory Planning Team (APT)

Time Commitment: One year of quarterly meetings (@ 3 hours each quarter) and frequent emails requiring responses.

Job description:

Mission - The APT is responsible to contribute to the development and initial delivery of the 2015 Strategic Plan.

Qualifications – APT members should possess the following characteristics:

- An understanding of CUNE's current mission
- A basic understanding of CUNE's history
- Experience in team work
- Innovative thinking skills
- Special skill sets in specific areas of need within the strategic planning process (e.g., group process, fiduciary competencies, business models, alumni relations...)
- A dedication to carrying out the work of the church through CUNE's ministry

Responsibilities – APT members will need to carry out the following tasks:

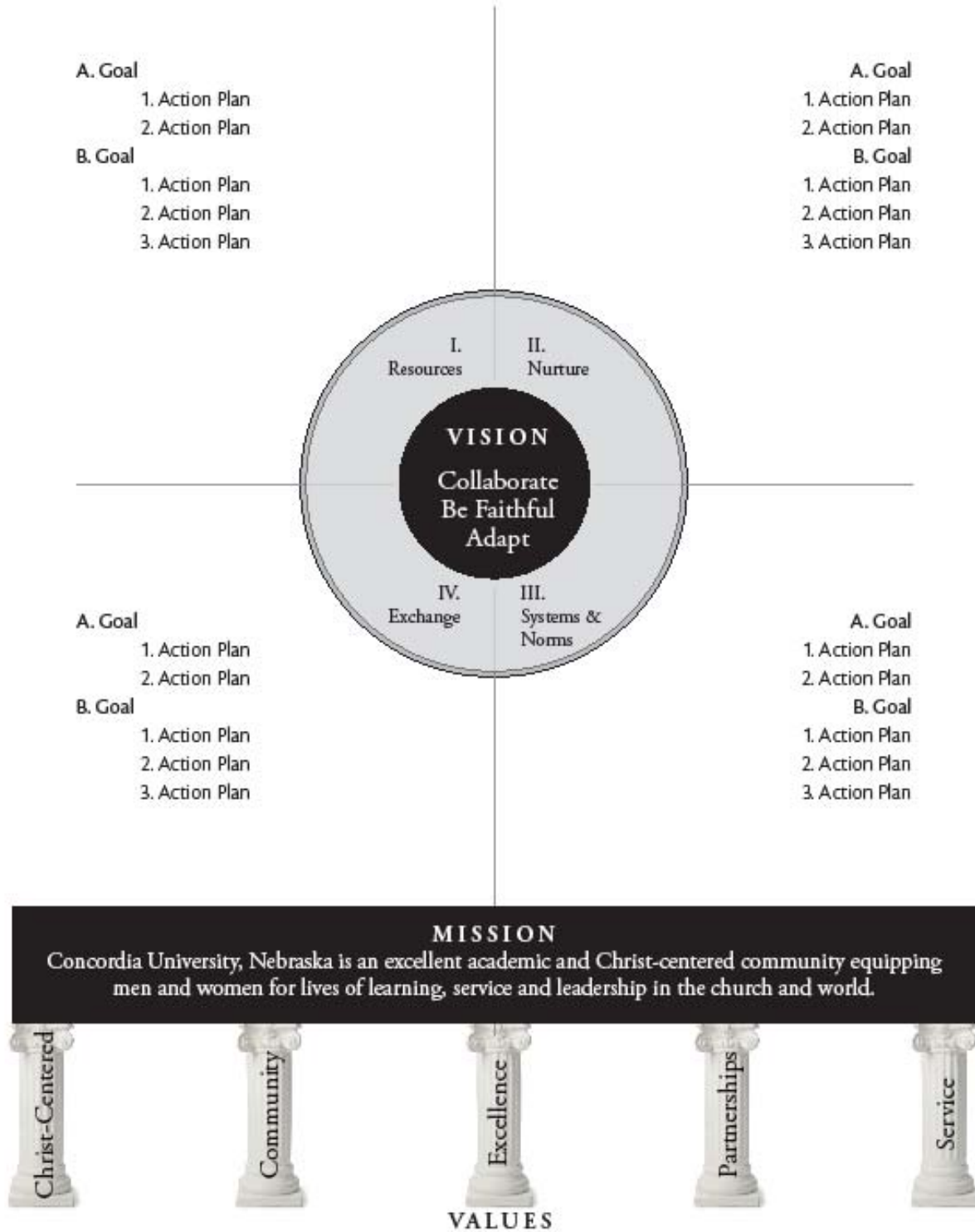
- Provide intentional feedback to the Core Planning Team regarding the development of a strategic plan that will effectively serve CUNE through 2015
- Define methods to best develop ownership of the strategic plan among the key constituents of CUNE
- Attend quarterly meetings – most often on the CUNE campus
- Provide insights and feedback regarding future trends in higher education and assess how those trends may affect CUNE in carrying out its mission
- Respond to planning-related emails in a timely fashion
- Review related materials as assigned
- Manage assignments as agreed upon

Responsible to: APT members are immediately responsible to the Director of Strategic Planning and through him to the University President

Evaluation: APT members may be asked to assess themselves during the year relative to the degree to which they are achieving their stated responsibilities. Final evaluation will be based on the successful completion of the stated mission of the Advisory Planning Team.

Appendix C: Strategic Plan Management Model

STRATEGIC PLAN 2015



3079RSQ1/09

Appendix D: Imperative Area Manager Job Description

Goal: To lead the development, implementation and assessment of action plans and goals, designed to achieve enhancement of one particular incentive area for the purpose of facilitating the achievement of the institutional vision.

Qualifications:

- Demonstrated leadership experience
- Commitment to the mission and ministry of CUNE
- Experience/understanding related to the assigned imperative area
- 5+ years of employment at CUNE
- A basic understanding of CUNE's institutional procedures

Responsibilities:

- Select and recruit an Imperative Management Team (3-8 members): team members must be approved by the Strategic Plan Manager in consultation with the university President
- Together with the team, develop goals and action plans aimed at enhancing the appointed imperative area
- Meet regularly with the Strategic Plan Management Team (SPMT) to report on plan proposals and progress and to submit goals and action plans for approval
- Work together with the President's Cabinet to see to it that key action plans are being implemented
- Provide evaluative summaries for your imperative area to the President for use in reporting on strategic plan progress to the Board of Regents
- Make certain that goals and action plans are consistent with institutional values, mission and vision
- Encourage and promote ownership of the strategic plan among CUNE constituencies
- The appointment will be for one year, renewable at the completion of that year

Responsible to:

Imperative Area Managers will be responsible directly to the Strategic Plan Manager and ultimately to the President's Cabinet through the SPMT.

Evaluation:

The Imperative Area Manager will complete a 360 degree evaluation annually. Participants in the evaluation will include the IAM, members of the SPMT, incentive area team members, the Strategic Plan Manager and other relevant stakeholders. This job description will serve as the evaluation criteria.

Institutional support:

A stipend of \$1200 will be provided for an Imperative Area Manager. Payment of the stipend may be aligned with achieving appropriate benchmarks as determined by the SPMT.

Artifact E: Imperative Area Team Member Job Description

Goal:

To help facilitate the development, implementation and assessment of action plans and goals, designed to achieve enhancement of one particular incentive area for the purpose of facilitating the achievement of the institutional vision.

Qualifications:

- Commitment to the mission and ministry of CUNE
- Experience/understanding related to the assigned imperative area
- A basic understanding of CUNE's institutional procedures
- Can work effectively on a team

Responsibilities:

- Together with the team, develop goals and action plans aimed at enhancing the appointed imperative area
- Participate in all team meetings
- Assist the Imperative Area Manager (IAM) to provide evaluative summaries for your imperative area to the President for use in reporting on strategic plan progress to the Board of Regents
- Make certain that goals and action plans are consistent with institutional values, mission and vision
- Encourage and promote ownership of the strategic plan among CUNE constituencies
- The appointment will be for one year, renewable at the completion of that year

Responsible to:

Imperative Area Team members will be responsible directly to their Imperative Area Manager and ultimately to the President's Cabinet through the Strategic Plan Manager and the Strategic Plan Management Team.

Evaluation:

The Imperative Area Team members will be assessed informally by the IAM annually. This job description will serve as the basis of the assessment. The annual assessment will be completed prior to renewal of position responsibilities for an additional year.

Artifact F: Vision Statement Criteria Areas

The following are those criteria that emerge as the key components of the 2015 Vision Statement. The task of the management process is to aim resources to achieve the criteria. The questions following each criterion are meant to provide guidance to Imperative Area Teams as they determine characteristics unique to their areas that would help to align the imperative areas in such a way as to achieve the institutional vision.

I. Ability to grow and expand influence: *Growth is imminent when what characteristics are present? What factors must align for an institution to effectively expand its influence and how must these be represented in your imperative area?*

II. Capable of reaching diverse populations (defined as individuals not presently a part of Concordia's sphere of influence): *Reaching new populations is a difficult task for any organization. What conditions would benefit your imperative areas ability to allow for optimum outreach to new populations?*

III. Able to foster collaboration: *Collaborations are win-win partnerships, that is, they benefit both organizations who collaborate. For an organization to effectively collaborate, it needs to provide attractive opportunities or resources for possible partner organizations. What characteristics in your imperative area would provide the ideal conditions for fostering collaboration?*

IV. Adaptive to change: *Change is happening, being adaptive to that change requires an organization develop a culture that responds to change in a way that increases the likelihood that the response will be healthy and benefit the organization. What characteristics endemic to your imperative area would be conducive to being an adaptive organization.*

V. Faithful to our mission of excellent Christian education: *Our efforts to achieve the vision must not happen in a way that ignores or competes with our overall mission and values. Additionally, we need to elevate achievement of the mission of excellent Christian education in a way that exceeds what we have done in the past. Consider how you imperative area may align with the goals of not conflicting with our mission and enhancing what we are doing in that regard.*

Artifact G: Resources Imperative Area Characteristics

Characteristics of an Imperative Area Aligned with the Vision **Resources**

The Resource area is divided into five categories. For each category there is a complementary pair of characteristics, chosen to provide a complete description for the category and ample coverage of the five vision components.

Category: Buildings and Grounds

Characteristics: **Appealing/Operational**

Descriptor: Our buildings and grounds must provide a functional space in which Concordia's employees can carry out our vision. The physical facilities must also be attractive and alluring to potential students and their families.

Category: Fundraising

Characteristics: **Extensive/Vigorous**

Descriptor: In order to help fund Concordia's ministry and vision, our development efforts need to broaden our already widespread donor base and to diligently pursue donor funding.

Category: Safety, Security and Risk Management

Characteristics: **Compliant/Responsible**

Descriptor: In this area it is important for Concordia to be responsive to the many requirements mandated by governmental and other agencies, but more importantly to accept the serious responsibility of ensuring the safety of our campus denizens.

Category: Operating Income

Characteristics: **Dependable/Expanding**

Descriptor: Fulfilling our vision requires that we pursue options that will enlarge our income stream.

Category: Technology

Characteristics: **Current/Adaptive**

Descriptor: Our vision will not be able to be achieved without functional and up-to-date technological resources. Needs in this area will continue to change in ways that cannot be predicted.

Artifact H: Nurture Imperative Area Characteristics

Characteristics of an Imperative Area Aligned with the Vision *Nurture*

Characteristic: **Healthy Relationships**

Descriptor: Relationships at Concordia are equal, respectful, and honest with clear lines of communication and support.

Criteria Areas: I, II, III, IV

Characteristic: **Culture of Trust**

Descriptor: Concordia is transparent with all employees in decisions and communication regarding mission, vision, and purpose.

Criteria Areas: I, II, III, IV, V

Characteristic: **Engaging Community**

Descriptor: Concordia has opened up to the outside world and developed a contagious energy that people want to be a part of.

Criteria Areas: I, II, III, IV

Artifact I: Exchange Imperative Area Characteristics

Characteristics of an Imperative Area Aligned with the Vision *Exchange*

Characteristic: **Student/Learner Centered**

Descriptor: The educational approach of Concordia is primarily focused on the needs and growth of the student, rather than those of others involved in the educational process. While supporting functions of the institution are important, priority is given to meeting the educational needs of the student

Criteria Areas: I, II, IV, V

Characteristic: **Excellence**

Descriptor: Distinction and quality is worked towards in all endeavors of the institution.

Criteria Areas: I, V

Characteristic: **Inclusive**

Descriptor: Internal and external collaboration is sought in an effort to seek efficacy, the common good and a win/win across the institution and with strategic relationships.

Criteria Areas: I, II, III, IV, V

Characteristic: **Christ Centered**

Descriptor: A commitment to Christian vocation and Christian mission is applied. The purpose of pointing to Christ is explicated in all work that is done.

Criteria Areas: I, II, III, IV, V

Characteristic: **Forward-looking**

Descriptor: New and creative approaches are welcomed and encouraged in an effort to be future oriented to meet current and future needs of the institution and its constituency.

Criteria Areas: I, II, III, IV, V

Artifact J: Systems and Norms Imperative Area Characteristics

Characteristics of an Imperative Area Aligned with the Vision
Systems and Norms

Characteristic: **Flexible**

Descriptor: The systems at Concordia allow the institution to respond to new or unanticipated situations without extensive overhaul.

Criteria Areas: I, II, III, IV

Characteristic: **Proactive**

Descriptor: Concordia's systems allow and facilitate forward thinking.

Criteria Areas: I, II, III, IV

Characteristic: **Communicated**

Descriptor: The systems at Concordia are communicated widely and clearly enough that those who need to make use of them are easily able to do so; the systems at Concordia allow information to reach the people who can benefit from it.

Criteria Areas: I, II, III, IV

Characteristic: **Understood**

Descriptor: The systems and norms at Concordia are broadly understood and accepted by the campus community.

Criteria Areas: III, V

Artifact K: Strategic Plan Management Team Design

Strategic Plan Management Team (SPMT)

Purpose

A strategic plan is only effective if it is implemented thoroughly and managed well. The SPMT is the team responsible to see to it that institutional actions are aligned with the strategic plan. The overall responsibility of the team is to identify and prioritize goals and action plans in a way that will most effectively achieve the institutional vision. Achieving the vision is viewed as the most effective method to achieve the institutional mission.

Team makeup

The SPMT is comprised of the following individuals:

Cabinet:

- Lisa Ashby, Associate Provost - voting
- Brian Friedrich, President - voting
- Pete Kenow, VP of Institutional Advancement - voting
- Dave Kumm, VP for Finance and Operations - voting
- Jenny Mueller Roebke, Provost - voting
- Scott SeEVERS, VP of Enrollment Management, Student Services and Athletics
- voting

Strategic Plan Team:

- Mark Blanke, Director of Strategic Planning - voting
- Rob Hermann, Systems and Norms IAM - voting
- Angela Muller, Nurture IAM - voting
- Brent Royuk, Resources IAM - voting
- Thad Warren, Exchange IAM - voting

Others:

- Ron Bork, Dean of Education - ex officio, advisory
- Dan Thurber, Dean of Arts and Sciences - ex officio, advisory

Decision-making process

Imperative Area Managers (IAMs) have the responsibility (together with their teams) to innovate, that is, to develop the goals and action plans that they believe will enable their imperative areas to most effectively achieve the institutional vision. The IAMs have the responsibility to advocate to the SPMT for the development and delivery of the goals they have developed. The SPMT will work to assess the validity and immediacy of the goals and will select specific goals for implementation. Once a goal has been prioritized, one or more Cabinet members will be assigned responsibility to work with the IAMs to oversee the implementation of the goal. The IAMs will then evaluate the implementation process for the goals in their area and will provide reports on those goals for the Board of Regents.

The SPMT will meet as needed. It is likely that there will be more frequent meetings at the start of the strategic plan management process.

Artifact L: Goal/Action Plan Submittal Form

Imperative area(s): _____

Briefly describe the broad goal:

What action plan(s) are you proposing to meet the goal?

Describe how the successful completion of this goal will help to accomplish the institutional vision:

Please present any appropriate data that you feel supports the need for the goal to be achieved:

On a scale of 1-10 with ten being high, what priority do you feel the SPMT should place on achieving this goal (as assessed based upon how achieving the goal will enhance our achieving the institutional vision)?

SPMT Action taken: _____ Assigned _____ Return for modification _____ Rejected

Date: _____ Cabinet member(s) _____

Artifact M: Approved Goal (Sample)

Goal/Action Plan Submittal Form

Imperative area(s): NURTURE

Briefly describe the broad goal:

To develop and nurture a positive contagious energy on campus that enhances creativity and motivation.

What action plan(s) are you proposing to meet the goal?

- Develop a “suggestion box” to allow submission of ideas.
- Determine available resources to be designated as appropriate for implementation of new ideas.
- Format and encourage methods for work teams to brainstorm and suggest innovative strategies which enhance institutional effectiveness.
- Gather input from all department members when making resource or staffing decisions.

Describe how the successful completion of this goal will help to accomplish the institutional vision:

Adaptive organizations rely on innovation and effectiveness among front-line employees. Collaboration needs to begin on campus before we can reach out to others.

Please present any appropriate data that you feel supports the need for the goal to be achieved:

- Anecdotal data suggests that people don't feel they are being heard.
- Faculty feedback in the spring session and feedback during the Pre-Mortem exercise in the fall shows that communication was identified as the number one obstacle to achieving goals here on campus.
- Due to ongoing reductions across campus, people feel overextended because of current workloads. Employees are unable to take on additional responsibilities and they are unwilling and unmotivated to put effort into “possibilities.”

On a scale of 1-10 with ten being high, what priority do you feel the SPMT should place on achieving this goal (as assessed based upon how achieving the goal will enhance our achieving the institutional vision)?

8

SPMT Action taken: XX Assigned _____ Return for modification _____ Rejected

Date: 9.30.09 Cabinet member(s) President Friedrich

Artifact N: Imperative Area Evaluation Procedures

IAMs have the responsibility of providing an evaluation for each Board of Regents visit. Evaluations will provide the Regents with a micro and macro view of our progress on the strategic plan. Because of the amount of work that board members have on their plates, brevity is the key in reporting. In addition, we seek to provide some level of standardization to help them manage the data. The following is an attempt to provide that standardization.

Macro: The macro view allows IAMs to provide insight into the overall alignment of the imperative area with the vision. The imperative area and the characteristics that teams have developed are assessed to determine alignment. The rating system used to assess the imperative area as a whole will consist of three “lights”:

Red: Indicates that the imperative area is not experiencing a healthy alignment with the vision, is experiencing a crisis, is stalled and not moving, or is in a condition that denotes a significant systemic error.

Yellow: Can indicate the imperative area as either declining in alignment with achieving the vision or is experiencing a slow and cautious movement towards an improved state.

Green: Indicates that the imperative area is well aligned for achieving the vision. The characteristic can be identified as healthy and stable.

In addition to the color ratings for each imperative area, the IAMs will also rate each characteristic for their imperative area using a 1-10 scale. The following descriptors provide some criteria for several of the numeric ratings that may be used.

1 = The characteristic is entirely absent and it's absence is a significant block to the health of the imperative area.

5 = Using a 1-10 scale means that there is no “middle” rating that denotes an “average” condition. A rating of “5” indicates that the characteristic is still more absent than present (as relates to achieving the vision) and possesses some very real challenges that need to be overcome.

6 = The characteristic is more in place than it is absent. While ongoing improvements are needed, the characteristic as a whole represents a component of campus life that is more supportive of achieving the vision than it is a detriment.

10 = The characteristic is fully present and aligned for achieving the vision. Additional goals would be unnecessary as this characteristic is in excellent shape to provide a catalyst for achieving the vision.

Micro: The micro view allows the IAM to assess the degree to which specific goals have been achieved. This evaluation will consist of a narrative based upon an interpretation of the reports received from the cabinet member(s) assigned to oversee the goal. The narrative should also include a statement on whether the actions associated with the goal have enhanced the imperatives area alignment as intended.

Artifact O: Imperative Area Evaluation/Nurture

Characteristics of an Imperative Area Aligned with the Vision
Nurture

Characteristic: **Healthy Relationships**

Rating _____

Descriptor: Relationships at Concordia are equal, respectful, and honest with clear lines of communication and support.

Characteristic: **Culture of Trust**

Rating _____

Descriptor: Concordia is transparent with all employees in decisions and communication regarding mission, vision, and purpose.

Characteristic: **Engaging Community**

Rating _____

Descriptor: Concordia has opened up to the outside world and developed a contagious energy that people want to be a part of.

Overall Rating of Nurture Imperative Area: Red / Yellow / Green

Evaluative rationale:

Artifact P: Imperative Area Evaluation/Resources

Characteristics of an Imperative Area Aligned with the Vision **Resources**

The Resource area is divided into five categories. For each category there is a complementary pair of characteristics, chosen to provide a complete description for the category and ample coverage of the five vision components.

Category: Buildings and Grounds

Characteristics: **Appealing/Operational**

Rating _____

Descriptor: Our buildings and grounds must provide a functional space in which Concordia's employees can carry out our vision. The physical facilities must also be attractive and alluring to potential students and their families.

Category: Fundraising

Characteristics: **Extensive/Vigorous**

Rating _____

Descriptor: In order to help fund Concordia's ministry and vision, our Development efforts need to broaden our already widespread donor base and to diligently pursue donor funding.

Category: Safety, Security and Risk Management

Characteristics: **Compliant/Responsible**

Rating _____

Descriptor: In this area it is important for Concordia to be responsive to the many requirements mandated by governmental and other agencies, but more importantly to accept the serious responsibility of ensuring the safety of our campus denizens.

Category: Operating Income

Characteristics: **Dependable/Expanding**

Rating _____

Descriptor: Fulfilling our vision requires that we pursue options that will enlarge our income stream.

Category: Technology

Characteristics: **Current/Adaptive**

Rating _____

Descriptor: Our vision will not be able to be achieved without functional and up-to-date technological resources. Needs in this area will continue to change in ways that cannot be predicted.

Overall Rating of Resources Imperative Area: Red / Yellow / Green

Evaluative rationale:

Artifact Q: Imperative Area Evaluation/Systems and Norms

Characteristics of an Imperative Area Aligned with the Vision
Systems and Norms

Characteristic: **Flexible** Rating _____

Descriptor: The systems at Concordia allow the institution to respond to new or unanticipated situations without extensive overhaul.

Characteristic: **Proactive** Rating _____

Descriptor: Concordia's systems allow and facilitate forward thinking.

Characteristic: **Communicated** Rating _____

Descriptor: The systems at Concordia are communicated widely and clearly enough that those who need to make use of them are easily able to do so; the systems at Concordia allow information to reach the people who can benefit from it.

Characteristic: **Understood** Rating _____

Descriptor: The systems and norms at Concordia are broadly understood and accepted by the campus community.

Overall Rating of Systems and Norms Imperative Area: Red / Yellow / Green

Evaluative rationale:

Artifact R: Imperative Area Evaluation/Exchange

Characteristics of an Imperative Area Aligned with the Vision
Exchange

Characteristic: **Student/Learner Centered** **Rating** _____
Descriptor: The educational approach of Concordia is primarily focused on the needs and growth of the student, rather than those of others involved in the educational process. While supporting functions of the institution are important, priority is given to meeting the educational needs of the student

Characteristic: **Excellence** **Rating** _____
Descriptor: Distinction and quality is worked towards in all endeavors of the institution.

Characteristic: **Inclusive** **Rating** _____
Descriptor: Internal and external collaboration is sought in an effort to seek efficacy, the common good and a win/win across the institution and with strategic relationships.

Characteristic: **Christ Centered** **Rating** _____
Descriptor: A commitment to Christian vocation and Christian mission is applied. The purpose of pointing to Christ is explicated in all work that is done.

Characteristic: **Forward-looking** **Rating** _____
Descriptor: New and creative approaches are welcomed and encouraged in an effort to be future oriented to meet not only current but future needs of the institution and its constituency.

Overall Rating of Exchange Imperative Area: Red / Yellow / Green

Evaluative rationale:

Artifact S: Goal Evaluation Form

Goal/Action Plan Evaluation Form

Imperative area(s): _____

Date when goal was approved by the SPMT _____ Goal priority _____

Cabinet member(s) assigned oversight of the goal _____

Briefly describe the goal:

Describe the approved action plan(s):

To what degree have the action plans been implemented as of this date?

Relevant information related to plan status:

Has action on the plan helped enhance any imperative characteristics? Yes No Unsure

Comments:

Date: _____ Imperative Area Manager _____

Artifact T: Imperative Area Review Request Form

Imperative Area Review Request

A review request is a process designed to direct one or more imperative area team(s) to assess the value of developing a goal or goals to assist in aligning imperative areas in a way that will best facilitate the achievement of the institutional vision.

Vision: By 2015 Concordia University, Nebraska will grow and expand its influence to diverse populations by fostering collaboration and adapting to our changing environment while remaining faithful to our mission of excellent Christian education.

Individual(s) requesting review _____

Please provide information on the review you are requesting:

Indicate how you believe the achievement of the vision might be enhanced through this review process (what is the hoped-for outcome):

Which imperative area(s) could best facilitate this review process (circle all that apply):

Systems and norms

Nurture

Exchange

Resources

SPMT action (to be completed following review consideration):

____Assigned

____Returned for clarification

____Rescinded

Artifact U: Imperative Area Review Request Sample

Imperative Area Review Request

A review request is a process designed to direct one or more imperative area team(s) to assess the value of developing a goal or goals to assist in aligning imperative areas in a way that will best facilitate the achievement of the institutional vision.

Vision: By 2015 Concordia University, Nebraska will grow and expand its influence to diverse populations by fostering collaboration and adapting to our changing environment while remaining faithful to our mission of excellent Christian education.

Individual(s) requesting review Mark Blanke

Please provide information on the review you are requesting:

Do systems and norms exist at CUNE relative to equity, parity and fairness? If so, do these systems and norms enhance our ability to achieve our vision or detract from it?

I would like the Systems and Norms Imperative Team to consider the questions and determine if the issue warrants further work to develop a goal. Examples may relate to pay, resource allocation, work load, an employee's ability to navigate the process of effecting change in responsibilities or status, evaluation processes and so on.

It should be noted that my operational assumption relative to being an adaptive organization isn't that there needs to be equity in all things - but that fairness and transparency is a need.

Indicate how you believe the achievement of the vision might be enhanced through this review process (what is the hoped-for outcome):

Front-line workers need to know that they are being treated fairly and that they have access to a process to facilitate change in their status or work environment. Employees must also realize that an adaptive institution may require allocation of resources in ways that may not seem equitable, but which facilitate institutional change in a way that facilitates the vision.

Which imperative area(s) could best facilitate this review process (circle all that apply):

Systems and norms Nurture Exchange Resources

SPMT action (to be completed following review consideration): <input type="checkbox"/> Assigned <input type="checkbox"/> Returned for clarification <input type="checkbox"/> Rescinded
