

Strategic Planning and Budgeting Retreat  
November 28, 2012  
for  
2013/2014 Planning Cycle

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# Strategic Planning and Budgeting Process

## Planning Retreat Report

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### Table of Contents

Overview and Approach.....	2
Audience .....	2
Leadership.....	2
Stakeholder Outreach .....	2
The Work.....	2
Findings and Conclusion .....	3
Findings.....	3
Feedback.....	3
Conclusion.....	4
Recommendation for Future .....	4
Next Steps .....	4
Appendix A	
List of Participants.....	5
Appendix B	
Survey Results .....	6
Appendix C	
2014 Initiatives.....	11
Appendix D	
PowerPoint Presentation.....	13

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# Planning Retreat Report

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## Overview and Approach

Aligning with Core Theme 4; Institutional Effectiveness, TVCC has integrated a Planning Retreat (step 1) into the Strategic Planning and Budgeting Process. The Retreat held November 28, 2012 is meant to kick off the strategic planning session for the 2014 Strategic Plan. Embracing a culture of evidence and inclusion brought about the Planning Retreat in an effort to set a direction for the 2014 Strategic Plan driven by the question: do the current initiatives of the college still align mission of the college?

Since this is an attempt to blend the “old” process with the “new”, a portion of the retreat was dedicated to understanding the future process. Following the explanation, the team engaged in a gap analysis, which is considered the catalyst for this inaugural Retreat attended by the Planning and Budgeting Committee and the Administrative Team.



### Audience

- Administrative Team
- Planning and Budgeting Committee
- Invited guests

### Leadership

Due to the timing of the Retreat, the Planning Retreat was planned by Institutional Research with valuable input solicited from:

- Randy Griffin, Dean, Administrative Services
- Dr. Paul Kraft, Dean, Student Services
- John Michaelson, Dean, Instruction
- Dana Young, President
- Dr. Renae Weber, Director, Assessment

### Stakeholder Outreach

An invitation was sent to each member of the Planning and Budgeting Committee and the Administrative Team, for a total of 24, 20 accepted, and 20 attended. The participants are listed in Appendix A.

### The Work

The work at the inaugural Planning Retreat focused on two goals: 1) further ensure an understanding of the future strategic planning process; and 2) recommend a direction for the

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## Planning Retreat Report

2014 strategic plan. The Retreat was carried out in five work groups seated at tables. The seating chart was randomly selected within a framework of: each member of the Administrative Team must be at a different table, a direct report could not sit at the same table as their supervisor, and an effort was made to mix divisions to encourage creativity and discussions with people from other divisions.

Goal #, understanding the process, was articulated through a short PowerPoint presentation and discussion on the current initiatives and definitions.

The remainder of the day was dedicated to Goal #2, recommend a direction for the 2014 strategic plan, by conducting a gap analysis. Each individual was asked to visualize a future state of the college and discuss within the group what that future state “looked like.” Groups were asked to submit 3-5 emergent themes, which were posted on the wall. The themes were grouped and categorized into a common theme category and finally associated with a current initiative, which lead to the final question in pursuit of goal #2: Did the work here today illustrate the need to sunset, refine, and/or rework the current initiatives?

### **Findings and Conclusion**

The first Planning Retreat was launched to start the path of embracing a culture of evidence and inclusion. The inaugural Retreat set out to accomplish 2 goals: 1) understanding of the future strategic planning process, and 2) to set a direction for the 2014 Strategic Plan driven by the question: do the actions of the college still align with the current Initiatives? The following section presents a summary of findings, results of the feedback survey, conclusion, recommendations for the next Retreat and the next steps in the 2014 strategic planning process.

#### **Findings**

The findings of the inaugural Retreat were clear in reflecting the importance of re-evaluating and aligning the current initiatives with the mission of the college. In the discussion about the meaning of each initiative which took place at the end of the Summit, the general consensus was that each initiative was still relevant; however, all initiatives were not accurately reflective of the respective Core Theme. Additionally, it was determined that some initiatives needed to be rewritten to broaden the scope to be inclusive of the entire campus.

#### **Feedback**

Dr. Renae Weber, Director of Assessments, conducted an electronic non-scientific, non-proven survey which was emailed to each participant by Bonnie McGehee. Feedback from participants was generally positive (Appendix B). For the most part participants appreciated the opportunity to participate in the planning process. Some feedback for improvement consisted of a more timely approach since the Retreat was rushed at the end especially since it ran over by almost one hour, and a clearer definition of the process, and the role of committee members. Goal #1 appears to have been accomplished by the results of the question “Do you believe you understand the 2014 Strategic Planning Process?” 92% answered yes yet; there is still work to be done to ensure 100% understanding. Understanding the role of PBC was a little more

## Planning Retreat Report

ambiguous since 17% of participants do not understand their role. Overall, an average of 50% of the participants felt that each section of the Retreat objective was met, with the exception of the Budget module, which garnered the majority of responses as a three. Further feedback will be solicited to determine the reason for the outcome.

### Conclusion

Goal #1 was accomplished in the sense that most participants understand the strategic planning process. However, it is clear that the process is not yet embedded into the culture and as such will need to be reviewed periodically for stakeholders.

A consensus on the direction of the 2014 strategic plan was accomplished. All Initiatives were retained with the following moved to a more relevant Core Theme, and most Initiatives were reworded (see Appendix C):

- Core Theme 1 (3 Initiatives)
  - Initiative 2 moved to CT2
  - Initiative 4 moved to CT2
  - Added CT3 Initiative 2 (duplicated in CT3)
- Core Theme 2 (5 Initiatives)
  - Added 2 Initiatives from CT1 (see above)
- Core Theme 3 (4 Initiatives)
  - All initiatives were retained
- Core Theme 4 (4 Initiatives)
  - All initiatives were retained

### Recommendation for Future

Four recommendations emerged as determined through observation and comments from the survey results. It is recommended pre-Retreat documentation is distributed to include a more in-depth explanation of the goals at least one week prior to the Retreat.

A second recommendation is to ensure that either adequate time has been allowed, or that the Retreat “fits” into the time allotted.

The third recommendation is to evolve this meeting into a “Retreat” or rename the meeting. It does not seem to be clear and fitting of the exercise.

Last, it is recommended that the Retreat documentation is distributed to the entire campus community so that all constituents may offer insight to participants prior to the Retreat. This will encourage participation at all levels of the institution, and foster an environment of inclusion to support a culture of evidence.

### Next Steps

The revised strategic planning initiatives will be communicated to the campus community, and Division and Department strategic plans will be initiated immediately for a timely written 2014 strategic plan by June 30, 2013.

## Appendix A

### List of Participants

Dr. Michelle Landa

Randy Griffin

Stephanie Laubacher

Lindsey Meza-Turner

Dr. Paul Kraft

Cathy Yasuda

Travis McFetridge

Priscilla Valero

John Michaelson

Bernie Babcock

Abby Lee

Jonathan Gillen

Scott Carpenter

Dana Young

Kaci Gastagana

David Reynolds

Gerry Hampshire

Dion Flaming

Dr. Renae Weber

Keith Raab

Virginia Crow

**Appendix B**  
**Survey Results**

# General Survey

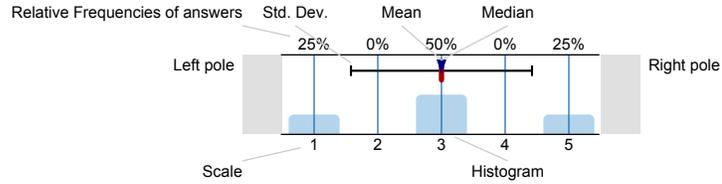
Planning Budget Committee Survey ()  
No. of responses = 12



## Survey Results

### Legend

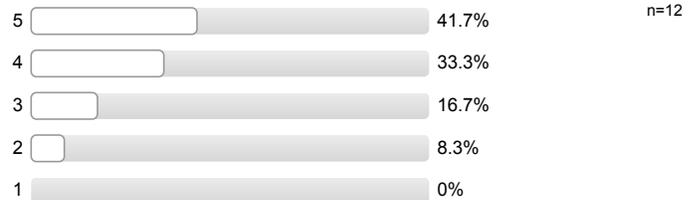
Question text



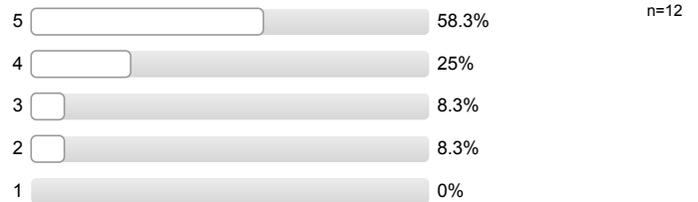
n=No. of responses  
av.=Mean  
md=Median  
dev.=Std. Dev.  
ab.=Abstention

### Planning - Budget Committee

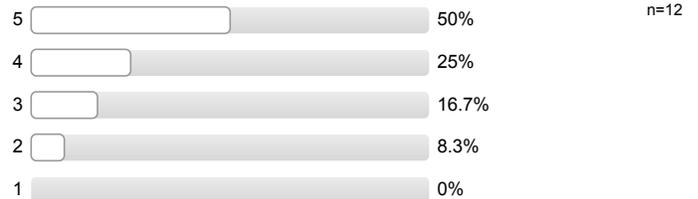
#### Introduction section



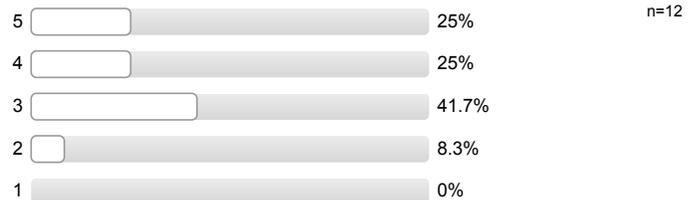
#### Brainstorming session



#### Closure activity (moving ideas to the CORE Themes).



#### Budget session



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Planning to attend the next P.B.C. meeting?



n=12

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Do you believe you understand the 2014 Strategic Planning Process?



n=12

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Do you understand your role on the P.B.C.?



n=12



Planning - Budget Committee

Suggestions to make the retreat more effective next year?

- I think it was interesting that it all pulled together with the way the introduction activity about 20 years out and then using those thoughts to plan the strategy came together. The only thing I would want to hear would be a few more guidelines to keep some folks (me...) on a better track of what we are really looking for as I probably had more "emotional" than practical ones. Which was okay, but clearly I could have offered more in my group had I grasped that concept...  
It was fun and I came out feeling like I learned a lot to bring to my working group and department. Thank you!
- I thought the time spent in this retreat was good, we were all allowed to share our ideas and we worked as a team to organize those ideas and goals. I felt very positive about the whole experience.
- I would probably suggest introducing the budget earlier in the meeting, to maybe give the group a better idea of what they are working with.
- It seemed to be a rehash of what we had done during the Summer a year and a half ago.
- More time to work through the activities. Ran out of time at the end to do the budgeting session.
- have more time spent on the budget explanations/discussions

Feedback

- I thought this was a good meeting overall. Everyone was engaged and participated freely. I think positive progress was made.
- Let's take some action and make some decisions.

Feedback

- Each time we go through it I understand it a little better.
- I don't really understand how we go from 'planning' to 'doing.'
- Much better than I did going into it...I wasn't sure what I would really have to offer besides a warm body, but feel I might could have a voice now.

Feedback

- I don't feel like my role has been explained to me. Do I just keep coming to the meetings?
- Mostly. I think it will become clearer as we work our way through the year's activities.

**Appendix C**  
**2014 Initiatives**

## 2014 Initiatives

Core Theme	Initiative
<b>Ensuring Access</b>	<ol style="list-style-type: none"> <li>1 Promote comprehensive and effective recruitment, and enrollment practices</li> <li>2 Maintain and build partnerships for private and public sector funding</li> <li>3 Provide a variety of educational opportunities at a reasonable cost</li> </ol>
<b>Educational Success</b>	<ol style="list-style-type: none"> <li>1 Enhance opportunities for student development.</li> <li>2 Provide comprehensive educational support services</li> <li>3 Provide quality instruction</li> <li>4 Support new and innovative academic programs to meet local and regional employment demands</li> <li>5 Provide a variety of delivery methods to inform, retain, and educate</li> </ol>
<b>Community</b>	<ol style="list-style-type: none"> <li>1 Enhance partnerships</li> <li>2 Maintain and build partnerships for private and public sector funding</li> <li>3 Support regional economic opportunities</li> <li>4 Showcase and share the TVCC story</li> </ol>
<b>Institutional Effectiveness</b>	<ol style="list-style-type: none"> <li>1 Foster a supportive culture</li> <li>2 Maintain, improve and expand facilities and technology</li> <li>3 Maintain fiscal responsibility</li> <li>4 Employ effective management practices and procedures</li> </ol>

**Appendix D**  
**PowerPoint Presentation**

# PLANNING RETREAT

Welcome



# PLANNING RETREAT

- Selection of Participants
  - Role of A-Team
  - Focus Area



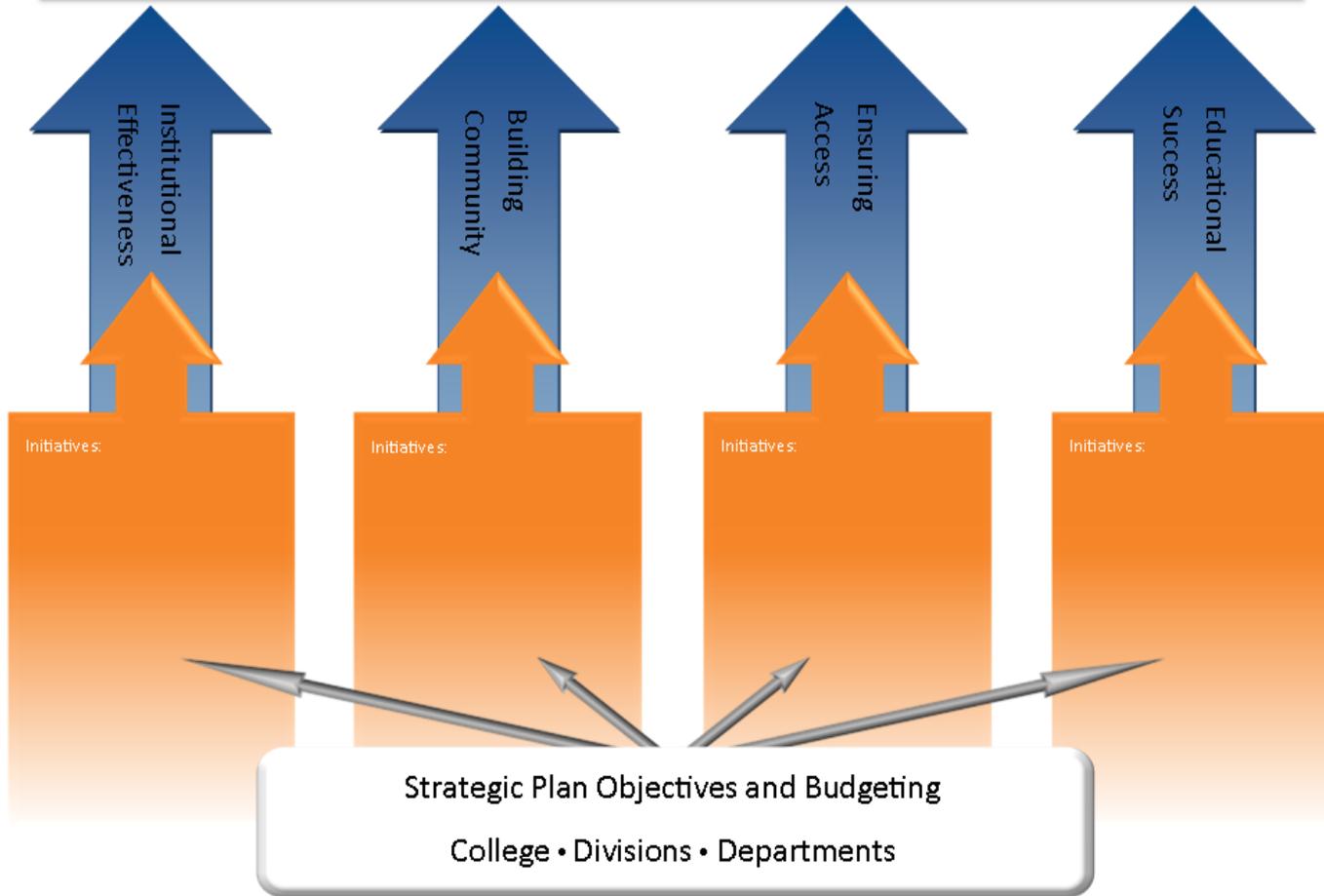
# PLANNING RETREAT

- Planning Process



# Mission Fulfillment

Treasure Valley Community College is a comprehensive community college providing quality educational opportunities and cultural enhancement in a financially responsible manner throughout our service area.

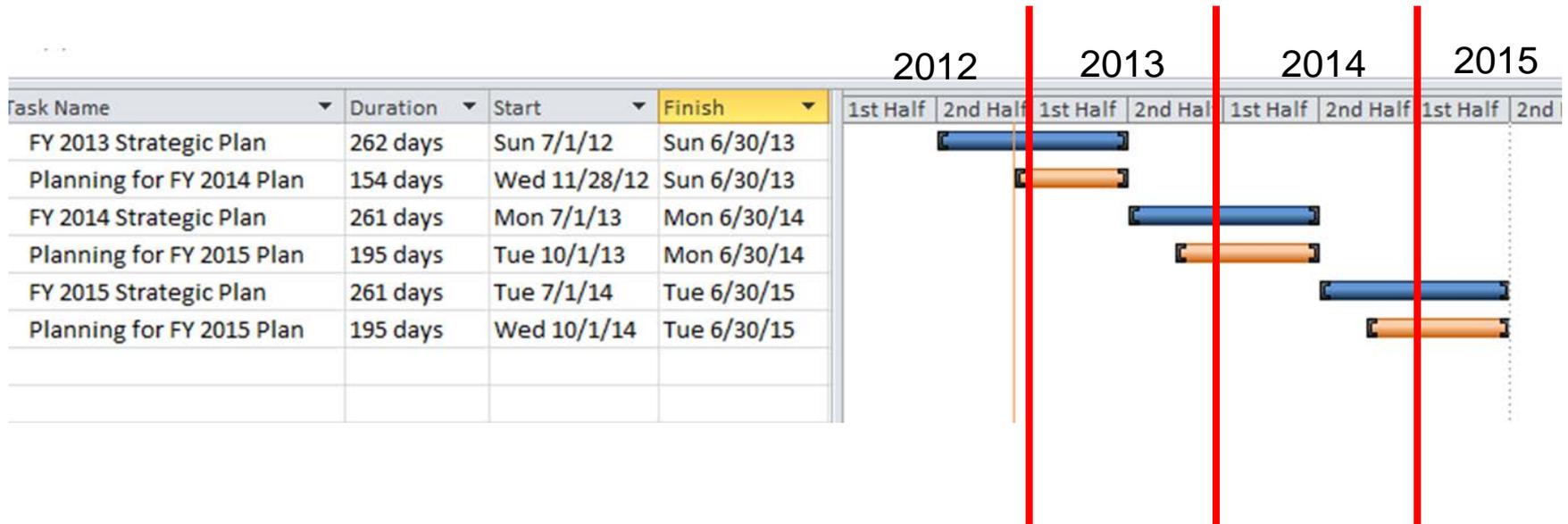


# PLANNING RETREAT

- Planning Process
- Timeline Review



# Understanding the timeline



# PLANNING RETREAT

- Planning Process
- Timeline Review
  - Milestones
- Core Theme & Initiatives



# PLANNING RETREAT

Core Theme	Initiative
Ensuring Access	1 Promote college access by developing comprehensive and effective recruitment, retention and enrollment practices
Ensuring Access	2 Develop new and innovative academic programs to meet local and regional employment demands
Ensuring Access	3 Provide a variety of educational opportunities at a reasonable cost
Ensuring Access	4 Provide a variety of delivery methods to inform, recruit, and educate



# PLANNING RETREAT

Core Theme		Initiative
Educational Success	1	Create and enhance opportunities for student growth and development.
Educational Success	2	Provide comprehensive educational support services to students
Educational Success	3	Provide quality instruction for educational success



# PLANNING RETREAT

Core Theme		Initiative
Community	1	Enhance collaboration with communities served by providing opportunities to explore and address community issues and needs
Community	2	Maintain and build partnerships for private and public sector funding
Community	3	Identify and provide economic opportunities and awareness for regional business and industry
Community	4	Develop a comprehensive communication plan to showcase and share the TVCC story



# PLANNING RETREAT

Core Theme	Initiative
Institutional Effectiveness	1 Operate in a culture that is cohesive, collaborative, and learning focused with mutual respect and support
Institutional Effectiveness	2 Maintain, improve and expand facilities and technology
Institutional Effectiveness	3 Encourage and model a climate of fiscal responsibility
Institutional Effectiveness	4 Employ effective management practices and procedures, and build leadership capabilities to continue to enhance institutional effectiveness and efficiency



# PLANNING RETREAT

- Planning Process
- Timeline Review
  - Milestones
- Core Theme & Initiatives
  - Definitions



# PLANNING RETREAT

- Gap Analysis

## Student Retention and Completion



# PLANNING RETREAT

- Budget Assumptions



# PLANNING RETREAT

- Next Steps



# PLANNING RETREAT

- Questions
- Thank you for participating



# PLANNING and BUDGET COMMITTEE

- **Members**

Comptroller – Jonathan Gillen

Director, Developmental Education – Dion Flaming

Director, Assessment – Renae Weber

Director, Center for Business, Workforce, and Community Learning – Andrea Testi

Director, Physical Plant – Bernie Babcock

Director, Financial Aid – Keith Raab

Executive Director, Foundation – Cathy Yasuda

Director, IT – Scott Carpenter

Director, Public Information – Abby Lee

Director, Institutional Research – Michelle Landa

Director, Advising – Lori Eyler

Faculty TVEA President – Gerry Hampshire

Faculty Members – David Reynolds and Sandy Porter

Classified Staff – Stephanie Laubacher and Virginia Crow

Professional Staff – Travis McFetridge and Priscilla Valero

Associated Student Government President – Susanna Fleming

CTE Student – Lindsey Meza-Parker

