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TO: Michigan State University Planning Committee Chairs

FROM: Julie A. Peterson and Steve Kloehn

RE: Strategic Planning Retreat (March 9, 2020) Summary

DATE: April 22, 2020

On March 9, 2020, the Michigan State University's Strategic Planning Committee and Diversity, Equity, and Inclusion Steering Committee convened a joint, daylong retreat to create a common context for their parallel planning processes. A total of 106 faculty, staff, administrators, students, and trustees participated. The retreat was not designed to produce conclusions or identify strategic planning priorities; rather, it was designed to identify issues that will be taken into consideration as plans are developed and to gather observations and information that will inform the processes that follow.

This summary report captures themes that emerged throughout the retreat. Where participants met as a whole for discussion, the report also helps identify levels of emphasis and consensus observed in the room. These observations are based on several sources: handwritten and electronic notes taken by table scribes during the morning breakout sessions; electronic notes taken by facilitators during the afternoon Strengths, Weaknesses, Opportunities and Threats (SWOT) exercise; and electronic, handwritten and after-the-fact notes and commentary submitted by individual participants.

This retreat took place just as the scope of the Coronavirus crisis was beginning to emerge. As a result, an early portion of the retreat was repurposed for a discussion of MSU's response to the crisis — those presentations and the following discussion are not included here.

AGENDA FOR MARCH 9 RETREAT

8:30-9:00   **Breakfast and Introductions**

- Participants sit at assigned tables.

9:00-10:00   **Welcome and Remarks:**
                              President Samuel L. Stanley, Jr

- President Stanley welcomes the group, thanks people for their participation, and reviews the goals for the day.
- *Note: The President's session was extended to accommodate discussion of MSU's response to the COVID-19 virus.*

10:00-10:30   **Context for Planning:**
                               Interim Provost Teresa Sullivan

- Interim Provost Teresa Sullivan presents a broad contextual overview of significant trends affecting MSU and peer universities, with time for questions.

10:30-11:45   **Context for Planning: Michigan State University Trends – Topic 1 (Table 1)**

- Discussion leaders join assigned tables if not already seated there. A table participant is identified as note taker.
- The discussion leaders will share 10-15 minutes of MSU context on the topic, followed by discussion.
- Guiding questions (15 minutes each):
  - What are the implications of the contextual information we've heard?
  - In what ways is this topic most relevant to MSU, and what are the most salient aspects that should be considered in our planning work?

10:45-11:00   **Break**

11:45-12:30   **Context for Planning: Michigan State University Trends – Topic 2 (Table 2)**
- Participants remain at tables: New discussion leaders facilitate the second topic and discussion.

12:30-1:15   **Lunch**

- Steve and Julie from PRG facilitate a broad discussion about thoughts from the morning sessions.

- Guiding questions (15 min each):

  - Thinking about your table discussions, what are some data points or perspectives you heard that gave you new insights?

  - How did the broad trends outlined by Provost Sullivan inform or shape your thinking in your table discussions?

  - What are some ideas you discussed at your tables that you think are especially relevant for Michigan State as it plans for the future? In other words, how do we translate data and evidence into strategy?

1:15-1:30   **Break**

1:30-3:15   **SWOT Analysis/Brainstorm**

- Steve and Julie lead the group in a 4-part SWOT brainstorm, beginning with silent work to answer each question and then group dialogue to collect ideas. When one person is facilitating the other captures notes on the screen. Written notes from table participants are collected.
- Questions:
  - Strengths: What are some strengths/areas of distinction at MSU that create a strong foundation for future endeavor?

  - Weaknesses: What are some weakness/areas of vulnerability we need to address for the university to thrive and be successful?

  - Threats: What are some external threats or changes in the environment that may influence our future direction?

  - Opportunities: What are the greatest areas of opportunity that lie ahead for MSU? How would we convert the strengths, weaknesses and threats we identified earlier into future opportunities?

3:15-3:30   **Wrap Up and Next Steps:**
          Vennie Gore, Joseph Salem, Cynthia Jackson-Elmoore, Luis Garcia

CONTEXT FOR PLANNING: MICHIGAN STATE UNIVERSITY TRENDS – TOPIC 1

Summaries are based on high-level review of notes provided by note-takers at tables, and as such are interpretative and not a full or accurate record of the discussions that took place. Notes were supplied in diverse formats including emailed MS Word documents, handwritten notes, and pages from easel boards.

Table 1. Context for Planning: Michigan State University Trends- Topic 1

Topic #	Topic Name	Notes Summary
1	**Disparities in Health**	• **Introductory comments** including definition of health disparities/inequities • **Student success:** Students who come from communities that have disparities are more likely to go into fields that would help remedy those disparities, but have lower levels of success. Need for more pipeline programs, e.g. Dow STEM and Charles Drew. Help students prepare earlier. Adapt admissions policies as possible. Provide greater academic support. • **Healthcare access at MSU:** An uninsured student only gets three free visits. Veteran students can't always go to Olin but must instead go to Ann Arbor and there is no transportation. Active parents better support students because they know how to work the levers.
2	**Relationship Violence and Sexual Misconduct (RVSM)**	• **Concerns:** RVSM, DEI and Incivility are all boiling pot issues. Greater vulnerabilities found in LGBTQ+ and disabled populations. Campus climate survey revealed incivility may be more widespread than anything else — academic freedom should come with responsibilities. However, fatigue and resistance to working on these issues. • **Addressing concerns:** Need integrated and universal structure of support and services for students, faculty and staff including policies and procedures. HR onboarding could help. Need to foster collective responsibility.

Table 1 (cont.) Context for Planning: Michigan State University Trends- Topic 1

3	**Climate for Students – Diversity, Equity and Inclusion (DEI)**	• Review of recent diversity **enrollment trends** • **Systemic change:** Recurring DEI issues for students have persisted over the past decade and will persist into the future. Solutions will require systemic and structural change including: explicit mission/vision; clear and consistently enforced policy; resource allocations; enrollment approaches; curriculum; student, faculty and staff awareness building and training. • **Culture shift:** Culture shift is equally important with structural change. Institutional culture has not evolved with external context. Faculty and staff are inconsistent in modeling inclusive and respectful practice (e.g., use of preferred pronouns, response to racial incidents). Students not afforded space for or encouraged to voice dissenting perspectives. • **Online growth** and context demands additional training and policy.
4	**Climate for Faculty**	• **Faculty trust:** Trust is a social contract between faculty and university. Need for transparency and appropriate information. Opportunities for all faculty to feel they can participate. Promote a culture of understanding where people can learn from mistakes. • **Faculty status:** Need for consistency in how all faculty are treated. Experiences of faculty of color may be different than majority. Need to bridge chasm between fixed-term and tenure-system faculty. Fixed-term faculty do not have same privileges and treated as "second class." • **DEI awareness:** Involve staff and faculty in addressing. Provide coaching from CAPS, etc., for handling difficult topics like implicit bias.

Table 1 (cont.) Context for Planning: Michigan State University Trends- Topic 1

5	Climate - Recruiting Under-represented Faculty	• Review of **MSU history** –past focus in 70s-80s. Less visible emphasis in more recent past. U-M took lead on issue. • **Retention challenge:** Efforts to increase hiring countered by lower retention. General belief that campus and community aren't as diverse and attractive to hires—hard to have life in East Lansing. Some disagreement. Some faculty feel that issue is more about being treated as special category. • **Addressing challenges:** MSU can better promote contributions in urban research, history of firsts. Make work of diverse faculty, departments, research a bigger part of the MSU story. Hiring should continue to evolve. Not just straight from grad school, but recruiting from elsewhere. Cohort hiring.
6	**Climate for Staff**	• Review of **staff composition data**; need for comprehensive agreement on data definitions • **ADP support:** Need for more support regarding ADP (Anti-Discrimination Policy) training and investigation. ADP complaints represent the most common category of staff complaints, primarily on race issues. Lack of clarity about RVSM v. ADP policies and enforcement; sense that RVSM is better supported. Concerns about reporting and impacts (e.g., moved employees) and questions about mandatory reporting. • **Culture of accountability:** Are leaders and supervisors being held to standards and regularly evaluated? All should model accountability to create confidence and trust among staff. Current culture may not allow for issues to be safely brought forward. Intentional dialogue is very important. Early (pre-complaint) attention to concerning behaviors can be encouraged including training.

Table 1 (cont.) Context for Planning: Michigan State University Trends- Topic 1

7	**Invisible/ Visible Needs in Physical Spaces**	• **Review** of numbers of individuals indicating disability and current capacity
		• **Innovation:** How university can use technology/online to serve. Ways to reconsider space use and be intentional. Importance of wellness support for students with disabilities as well as all students. MSU research in field is developing.
		• **Opportunity:** Build on strong foundation and experience to be a national leader among universities in this field. We are innovative, we need to examine the results; tell the world - identify needs in the community. Be a magnet for students with disabilities.
8	**Community Engagement**	• **Review** of current strategy and approach at MSU. 80% of current students participating in an engagement activity.
		• **Definition and metrics:** Need to make community engagement integrated across our strategic plan. Reflect all the ways we bring in research and teaching to community. Define what we mean by community engagement broadly and holistically, not simply a check box activity. But also identify metrics that show impact and account for work (e.g., in tenure and promotion).
		• **Funding:** Articulate importance and impact of engagement to state, as with public health and natural resource management, to secure more funding. Understand resource commitments and account for them in budget. Strengthen case for support as integral to MSU. Not a separate activity.
9	**Extension**	• Review of **current scope** – focus on ag, food, health and nutrition and 4-H (400k students) statewide. Portion of 100 faculty members.
		• **Evolving scope**: Newer domains of solar, health, communications, big data, soil health. Urban engagement in Flint and Detroit developing. Need for asset-based community development instead of looking at deficits. Challenges of rural economic development considering demographics.
		• **MSU identity**: Extension is mission and big part of what we are known for. MSU can continue to define practice and lead in bold new ways. 4-H network can be included in DEI approach. Affirmation of MSU purpose.

Table 1 (cont.) Context for Planning: Michigan State University Trends- Topic 1

10	Budget/ Finance	• Review of **current MSU financial and budget model** (Incremental) and basics of Responsibility Center Management (RCM) model • **Consideration factors:** General agreement that current budget model not effective and adaptive. Goal of greater transparency in a new model. "Budget model is not strategy" and model should be aligned to priorities, mission, vision, goals. RCM is one approach. Hybrid model will likely be most effective and allow for adaptation. • **Needs:** Transparency and clarity for deans, etc. to align to institutional budget. New development should consider metrics, activity-based models, outcome-based models, performance-based models – be nimble and adaptive.
11	Enrollment Management	• **Big questions:** To what extent is class composition a function of mission/vision/values? Should we become bigger and what are infrastructure limitations? Is bigger desirable? Maybe get smaller in East Lansing. Need to think about virtual and mobile options. Need to align with budget model.
12	Student Debt/Financial Aid	• Review of **student debt characteristics** • **Budget balancing:** Student debt load and ability to repay varies, e.g. medical school v. engineering. Reliance on financial aid is significant, will continue to grow. Challenges for low income students. Legislature limits out-of-state enrollment, but must be balanced approach. Could include more out-of-state and international students to help with financial aid gap. • **Competition:** How will MSU remain competitive. Tuition and fees high compared to other Big Ten. Competition from online options – these options will be more accepted. Campus experience has been MSU strength; not all programs can or should be taught online (e.g., music, lab science).

CONTEXT FOR PLANNING: MICHIGAN STATE UNIVERSITY TRENDS – TOPIC 2

Summaries are based on high-level review of notes provided by note-takers at tables, and as such are interpretative and not a full or accurate record of the discussions that took place. Notes were supplied in diverse formats including emailed MS Word documents, handwritten notes, and pages from easel boards.

Table 2. Context for Planning: Michigan State University Trends- Topic 2

Topic #	Topic Name	Notes Summary
1	**Undergraduate Education**	• **Review** of current state • **Student success:** Old model was admission and sorting. Focus has shifted to persistence, completion. Part of land grant mission and our core responsibility. Adding a point to graduation rate each year since 2015. • **Approach:** Focus on academic standing + institutional navigation + sense of belonging. Identity-based initiatives for LatinX, African-American, upcoming focus on Veterans and LGBT. Peer coaching and students as part of developing solutions.
2	**Graduate Education**	• **Needs:** Research is essential to land grant mission; cannot retain research faculty without graduate students. *Within the Big10, MSU has one of the largest graduate student populations but considerably less funding for graduate students and less staff than average in the graduate school*[1] (see footnote, p14). Need to invest in graduate student development - mentorship, shorter time to degree, support for DEI, professional development, alignment to industry. • **Considerations:** Address organizational structure of graduate school. Engage colleges in addressing needs. Consolidate and think through approach for online education at graduate level.

Table 2 (cont.) Context for Planning: Michigan State University Trends- Topic 2

3	Research Trajectory	• **Review of mission goal** to be Top 100 Research University and competitive research standing. • **Challenges:** MSU research has grown (2012: ~500M – 2019: ~750M) but required lots of resources. MSU lacks characteristics of top universities: student selectivity, academic hospital start-up packages for faculty. Spread too thin? • **Future:** More focused strategy should be considered. How does MSU become more competitive for NIH, DOE, etc. – and will this funding continue. Must always balance teaching, research and community. Need more start-up money. Public health + clinical is a growth opportunity. Must have academic hospital partner.
4	**Student Mental Health**	• **Current state**: Prioritizes suicide threats and crises. Use of off-campus services to meet excess need. Growing volume of expressed need greater than CAPS resources. • **Future commitment**: Must be a university priority to address mental health of all students. Should look at it as holistic health, physical health and mental health. Current approach of crisis intervention does not fully meet our responsibility. Clarify MSU's mission about mental health. Must have a stable budget and the right structure. Overall effort promotion of resources, prevention, treatment. Relates to campus climate as well.
5	**Legal Landscape for Higher Education**	• Review of **current and emerging issues** in compliance and policy. • **Federal government**: 7-8 years of intensive effort. Significant antitrust suits and actions by DOJ relating to admissions market (early decision, no poaching, etc.). NACAC compelled to revise its code of ethics. Also enforcement actions relating to China and intellectual property. Investigations including of faculty members at various institutions. Unsettled Title IX rules, will depend on political and election factors. • **Other potential legal and compliance concerns**: Accessibility, healthcare, web accessibility, concussions/NCAA. MSU will need to be proactively prepared.

Table 2 (cont.) Context for Planning: Michigan State University Trends- Topic 2

6	**4th Industrial Revolution Economy/ Digital Revolution**	• **Introductory comments** regarding definition and implications of 4th industrial revolution economy • **Implications:** Speed of change, quickly outdated technology and models. Traditional university processes take too long. Artificial Intelligence and potential role in university functioning and teaching. Not if, but how fast. Relationship to values and practices of university, including land grant identity. Need to focus on serving student needs, including DEI. • **Market forces:** Demands of employment market driving education. Dual market- accreditation of discipline and then by employers. Subscription service education as needs continually evolving. Break down silos to provide relevant education. Employability.
7	**Health Sciences: Connecting Strengths Across Campus**	• **MSU mission/land grant:** Well-being of all fits land grant mission and supports communities – accessibility, affordability for all. Leverage statewide network to identify community health challenges. Focus on innovation e.g., mobile unit/bus that brings care to community. • **Undergraduate education:** Health, well-being and resiliency – prepare students for healthy living ("dust off Healthy U initiative"). General education should include health wellness education. • **New school/college:** Create school/college of Community Health or Population Health or Community Well Being. Bring together expertise and resources of a number of entities (CUM, Social Work, CHM, COM). Offer dual degrees through new entity.

Table 2 (cont.) Context for Planning: Michigan State University Trends- Topic 2

8	**Residential Education**	• **Review** of current state, including current numbers. Unique to MSU residential colleges.
		• **Future trends:** What will residential education look like moving forward considering student demographics, changing preferences, online and hybrid education. Some institutions are heavily investing in this area. Residential experience is costly, not accessible to all. What should be MSU strategy in face of changing and uncertain context. Should we be a residential institution?
		• **Education centrality:** Important to focus on educational dimensions, beyond living facilities. Strong educational programs linked to residence halls at MSU; is this a model we will continue to invest in? Residential programs (e.g., living/learning, focused on disciplines, global challenges) can be vital aspects of education. But not universally accessible. How might we be inclusive including taking dorm programs out of dorms and available for all.
9	**Research - Intellectual Capital**	• **Review** of current state. Corporate partnerships, esp. with startups – very attractive to faculty. Universities as innovation producers as companies outsource. Younger faculty especially engaged – already think about translation.
		• **Opportunities:** Encourage focus on social enterprise and non-profit aligned to mission. Useful invention – e.g., digital agriculture and extension support. International engagement. Engage alumni for venture capital. Evaluate faculty on IP and community engagement.
		• **Challenges:** Can distract faculty from university role. Conflict of interest. Compliance management, e.g., outside work for pay, use of MSU facilities. University not nimble.

Table 2 (cont.) Context for Planning: Michigan State University Trends- Topic 2

10	International Engagement	• **Review** of history, scale and current state of international engagement. Focus on international students.
		• **Implications:** Int'l engagement and students essential to Top 100 status. Global context changing rapidly and MSU must see challenges as opportunities. Study Abroad program excellent and well established, will need to adapt, e.g. novel coronavirus, affordability. Partnerships in Africa important.
		• **Future:** Diversify international student population – more sending countries. Strategically increase partnerships around the globe – maintain trust and brand. Ensure international students are fully supported at MSU.
11	Educational Delivery/ Emerging Technologies	• **Strategy:** Very important to MSU future. We need to determine overall strategy. Opportunities to grow and address enrollment factors. Leverage current distributed efforts through central capacity. Must maintain brand and quality online — be MSU.
		• **Student support:** Online still means student wellness and support. How to address health, wellness, safety, e.g. cyberbullying. All student needs exist online, plus additional needs of online environment.
12	Arts Initiative	• **Arts strategy planning:** Two years ago, extensive planning process and recommendations, consultant led. Included benchmarking with universities, including UM. Goal is to integrate arts broadly into MSU campus life, enhance learning and research across the university, enhance the experience in a more holistic way. Determination that Arts at MSU is siloed and distributed, needs greater integration and collaboration.
		• **Future state:** Integrate into comprehensive curriculum — art and sciences strengthen each other. Faculty senate and others may need to think more creatively about curriculum based on intersections. Administrative levels must consider resourcing, provide incentives and rewards. Need for "sales pitch" — ways to depict value. Must overcome complicated structure.

Note: [1] Factual correction received for Topic 2, Table 2: Graduate Education by Thomas Jeitschko, Dean of the Graduate School at MSU.

SWOT ANALYSIS: STRENGTHS/AREAS OF DISTINCTION

What are some strengths/areas of distinction at MSU that create a strong foundation for future endeavor?

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

- **Land grant mission and values:** Open access to knowledge and education; for benefit of state, people and communities.

- **Extension and outreach:** Statewide footprint and impact; MSU widely recognized as fulfilling and increasing outreach mission; translation of research for use.

- **Community engagement:** Reciprocal, respectful relationships with communities; participatory research to address societal problems; volunteer service; engagement with urban communities.

- **Large/comprehensive/expansive institution**: Size, scope, scale; strength across broad spectrum of disciplines.

- **Research strengths and potential:** Many strong programs/leading in disciplines; many individual programs listed; AAU membership.

  - **Frequent example: (FRIB) Facility for Rare Isotope Beams**

- **Loyal alumni and MSU "family"**: Loyal and committed alumni; faculty, staff, retiree loyalty; statewide loyalty; individual and family commitment over generations.

- **Undergraduate experience:** Residential colleges; history of serving first generation students; MSU cares about students.

- **Spartan spirit**: Real can-do attitude; friendliness, openness; Big U with intentionally small-institution feeling of care.

- **Athletics**: Strong athletics performance, winning teams; Big 10 Academic Alliance; done with integrity; coaches and faculty interact.

- **Capital city/location:** Capital city; city with two of the most vibrant auto manufacturers, hospitals, insurance – draw students, give students experience; low cost of living in a vacation state – Pure Michigan; quality of local schools, quality of life.

- o **International engagement, especially study abroad:** Deep roots abroad, worldwide respect, long history of study abroad partnerships.

- o **Campus/Physical infrastructure**: Looks like a university, coherent boundaries, # of beds in residence halls, strategic public spaces, dining facilities.

<u>Additional themes</u>

- o Medical and health impact: Two medical schools producing 500 physicians a year, most who stay and serve MI; health sciences, nursing; interns, residents all around state.

- o Arts, cultural and performing arts institutions.

- o Good financial management: Financially well managed institution, good endowment; independent research foundation that is financially sound; run own utilities – efficiency and control.

- o New president, willing to take on challenging initiatives, open and communicative, proactive on Covid-19.

- o Constitutional autonomy

- o Supportive resources for survivors - those impacted by violence
    - o Safe Place
    - o Center for Survivors

SWOT ANALYSIS: WEAKNESSES/AREAS OF VULNERABILITY

What are some weakness/areas of vulnerability we need to address for the university to thrive and be successful?

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

- o **Risk averse:** Not always willing to push the boundaries; need to be a "learning organization"; wish we could see challenges as ways to learn and grow, rather than as threats; need to seek out divergent opinions; practices not keeping up with the times – based on experiences that are historical and not well informed; not setting sights high enough.

- o **Internal and external communications:** Poor internal communications – lack of clear messaging and coordination; insufficient crisis management and external strategic comms; too protective of the brand; don't tell our story/trumpet our successes very well (getting better).

- o **Mistrust of administration:** Lack of accountability; living in era of significant distrust and cynicism toward administration; leaders experienced turmoil of past 2 years differently depending on where we sit – haven't fully addressed and reconciled; lack of succession planning, leadership training; lack of transparency at all levels; history of weak shared governance.

- o **Bureaucracy/Lack of agility:** Too bureaucratic; problems of size, scope and scale: big ship, hard to turn; takes long to get to "yes"; structural silos run deep, creating dysfunction – ex: information sharing and hoarding; hard to find information - ex: rules for maternity leave: hard to find policies.

- o **DEI (Diversity, Equity & Inclusion) approach:** No cohesive approach; lack of faculty diversity; must integrate into all strategic goals; reactive approach to diversity, rather than proactive; lack of representation of US people of color in administration, esp. Mexican Americans.

- o **Campus climate and "safety":** Not a safe, welcoming, inclusive environment for many; need for more counseling in the aftermath of what happened at MSU ; more to be done to promote safety/address sexual assault; culture of devaluing/disregarding abuse of women; hard place for single people of color, especially women; some people have weaponized the OIE process - pendulum has swung too far the other way.

- o **Insider/outsider administrative culture:** Faculty and staff who feel excluded/disenfranchised; folks circle wagons in a crisis; insiders and outsiders – some staying too long; everybody thinks they're an exception to the rules – causes cascade of

problems; importance of relationships sometimes backfires – if you're friends with someone you can skirt the rules; fear of retaliation if you speak up.

- o **Budget model:** Opaque/not transparent; antiquated; poor distribution of resources.

- o **Undergraduate education/support:** Opportunity gaps among subgroups of students; lack ability to provide academic and social support to all students who need it; general education model for integrative studies; gen ed requirements for all undergrads.

Additional themes

- o High cost: Financial aid base that doesn't cover full cost for low-income students; high tuition cost for international students.

- o Faculty support: Uneven support; professors of practice and academic specialists – any nontenure faculty – are underappreciated, no good career path; not having a good policy for dual hires.

- o Support for teaching: lack of teaching/learning center or equivalent best practice for teaching; bifurcation in understanding instructional modalities delivery (online v. on campus rather than integrated).

- o Research: Zero Nobel Prize winners, few National Academies members; scholarly metrics (by size) at bottom of AAU; General lack of support for graduate program – not a cohesive approach to graduate students, which affects research excellence.

- o Financial strength: Financially not as well off as some other institutions including U-M; limits opportunities; dependence on market return to finance bonds.

- o Thin administratively compared to peers; insufficient expertise around admin issues such as financial, HR, etc. within depts/colleges/units.

- o Infrastructure challenges.

SWOT ANALYSIS: THREATS/ENVIRONMENTAL CHANGES

What are some external threats or changes in the environment that may influence our future direction?

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

- o **Enrollment scarcity:** Michigan demographic cliff and lower birth rate; other demographic shifts in enrollments; entering a "devil take the hindmost" era in higher ed; universities and colleges closing because of enrollment pressure.

- o **Reductions in funding/state support**: Reduced state funding and continuing reductions in support for public higher ed; unpredictability of federal, state, local elections and potential impact on university; impact of potential economic downturn on institutional investments; impact on affordability of education.

- o **Domestic political polarization:** Increased polarization affects campus climate; increased violence and hostilities accompany polarization; perception of the university/higher ed as politically left-leaning.

- o **Public opinion of higher ed:** Growing public skepticism about higher ed affecting university resources, job security; challenges regarding contribution to society, value of degree, content of degree; questions about how higher ed is organized, about credentialing, about what we deliver for the cost; pressure to reduce the university to workforce development.

- o **Increasing online competition:** New educational modalities may be entering a "winner take all" market: new modalities scale inexpensively; Arizona State, Purdue, Penn States of the world may take our market share; higher prestige institutions could cannibalize MSU; lessoning concerns about online quality, now being forced by experience where students will get used to distance learning.

- o **Uncertain international context/global risk**: Deteriorating U.S. international relations affecting students, research, outreach; other nations investing heavily to enhance their education and research – new kinds of competition. Risks include geopolitical, travel, foreign influence, cybersecurity.

<u>Additional themes</u>

- o New and disruptive competition: Competition from other sectors not traditionally in our space that we're not prepared to address; universities becoming more corporatized in decision-making and priorities; e.g. employer led education.

- Affordability: Collapse of American middle class; public concern re affordability; rising student debt, particularly in medical school.

- Environmental/climate change: counter to mission of serving underserved populations.

- University of Michigan.

SWOT ANALYSIS: OPPORTUNITIES

What are the greatest areas of opportunity that lie ahead for MSU? How would we convert the strengths, weaknesses and threats we identified earlier into future opportunities?

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

- **Rebuild/renew culture of trust**: New leadership can rebuild trust; learning from recent crisis could provide leadership for the nation; self-reflection is an opportunity in itself – let's stay in the discomfort to gain benefits, make lasting progress, structural change; opportunity for a fresh start each year – whole class of students coming who were not here for any of the crisis; tapping faculty expertise in addressing tough campus issues.

- **Define values and expectations:** Opportunity to develop shared definition, expectations of transparency; what do we mean by innovation, inclusivity – be clearer; we can model values and behaviors we want MSU to teach and live up to, be more transparent about values and aspirational behaviors – what's the follow through; define and measure our excellence according to our own values.

- **Public strategic planning process**; Opportunity to re-establish credibility, transparency, include more voices; share priorities; implement strategic plan for arts and humanities to respond to complex societal and climate problems; develop key performance metrics (for all parts of institutions) out of this process.

- **Lead in DEI:** Opportunity for real multicultural campus – must be transformational; make part of every strategic effort; strong focus on faculty hiring and development; provide resources such as faculty and student training.

- **Support students:** Focus on student well-being; make better use of campus resources for mental health – investment could unlock the possibility to serve more students; serve all students including LGBTQ.

- **Strengthen communications:** More and better story-telling about MSU; engage family; leverage brand; improve reputation; improve access to information.

- **"New' land grant university:** Reinvent what it means to be 21st Century land grant institution, instrument of social justice, vehicle for collective soul-searching; context of fourth industrial revolution, update to acknowledge changes in basic economic forces; continue exploring P3 (public private partnerships).

- **Undergraduate education innovation:** Chance to look at general education, its value, imagine different gen ed in future; residential colleges can be engine of pedagogical innovation; also expand opportunities for where, when and how students learn;

continue to build strong interdisciplinary programs; more hands-on science and exposure to technology; still need people in the lab, and we have the facilities for it.

- o **Expand enrollment pathways:** Fourth Industrial Revolution offers new way to serve alumni, with stackable credentials, lifelong learning, etc.; create aligned educational pathways and innovative ways to recruit students, innovative curriculum and co-curriculum, seamless pathway through all; expand reach geographically diversify including in international student enrollment.

<u>Additional themes</u>

- o Public engagement: Lead in constructive engagement; drawing on campus expertise on civic engagement to work/teach against partisanship, polarization; capitalize on pay it forward attitude, contribute expertise, mentorship, relationships; collaborations to address perceived community needs – do good, improve relationships-perceptions.

- o Financial strength: With short history of development, MSU has opportunity to rocket ahead in next campaign; MSU Foundation and corporate partners; could admit more out-of-state students at time of financial pressure, help us invest in strategic opportunities.

- o Research: Health and healthcare; climate change; invest in specific areas.

- o Public science: Function as scientific safety net, as government recedes from former roles; make increasingly complex science accessible to public.

APPENDIX A
Comments and notations to the March 9, 2020 Michigan State University (MSU) Senior Leadership Retreat Summary

This appendix is intended to supplement the full retreat summary. The summaries in the original document are based on Peterson Rudgers Group's high-level review of notes provided by note-takers at tables, and as such are interpretative and not a full or accurate record of the discussions that took place.

Upon receipt of the Peterson-Rudgers Group summary, members of the DEI Steering Committee and the Strategic Plan Steering Committee were asked to review and provide comments, observations, or factual corrections. Comments and observations received by May 15, 2020 are included below, in the sections of the retreat that are most applicable. Comments and observations are referenced in *italics* or *NOTED*. Factual corrections are footnoted in the original document.

GENERAL COMMENTS RECEIVED

- *Upon reading through the 22 pg. report, it seemed to capture what I recall from the retreat and listed items discussed at our table. The Coronavirus has brought to the forefront several of the themes mentioned in the SWOT analysis pertaining to MSU's online readiness (lack) and finances compared to other institutions.   The gap will widen for urban, rural, international students who may lack the resources as their wealthier counterparts. Many students of color that were struggling before the Coronavirus closed MSU is more stressed without their MSU support mechanisms. In many cases, returning home is not always better and it is hard to remain in an off campus apartment with no job. There were many uplifting themes in the opportunity section for moving forward in the SWOT analysis.*

CONTEXT FOR PLANNING: MICHIGAN STATE UNIVERSITY TRENDS – TOPIC 1
Table 1.

Topic #	Topic Name	Notes Summary
1	**Disparities in Health**	**Healthcare access at MSU: _** - *NOTED: that while transportation off campus is challenging, The MI Flyer provides reasonably cost bus service between East Lansing and Ann Arbor.*
2	**Relationship Violence and Sexual Misconduct (RVSM)**	- **Addressing concerns:** Need integrated and universal structure of support…. - *NOTED: that One-size fits all approaches tend not to be very helpful. Comprehensive services for sure but I would imagine given the variations found on the KnowMore survey, there needs to be some customization of service delivery for different populations on campus.*

3	**Climate - Students – (DEI) Diversity, Equity and Inclusion**	• **Systemic change:**
		
		  ○ ***NOTED:*** *that DEI issues are entrenched and reach far beyond the past decade. That changes need to start from the top.*
		
		• **Culture shift:** Culture shift is equally important with structural change. Institutional culture has not evolved with external context….
		
		  ○ ***NOTED****: There are clear nuances within institutions. We don't offer much support to train others re: respectful conversations, how to hold disagree without being disagreeable, that dialogues do not have to have winners and losers.*

4	**Climate – Faculty**	• **Faculty trust:**
		
		  ○ ***NOTED****: that beyond opportunities for all faculty to feel they can participate is the importance that their voices are acknowledged and heard.*
		
		• **Faculty status:** Need for consistency in how all faculty are treated.
		
		  ○ ***NOTED****- treatment should be equitable and not merely equal. Illustration here depicts the difference*
		
		• **DEI awareness:** Involve staff and faculty in addressing. Provide coaching from CAPS, etc., for handling difficult topics like implicit bias.
		
		  ○ ***NOTED*** *that the CAPS may not be best venue for this type of coaching and that we need to engage folks who have the expertise to address these issues.*

5	Climate - Recruiting Under-represented Faculty	• **Retention challenge:** Efforts to increase hiring countered by lower retention. General belief that campus and community aren't as diverse and attractive to hires—hard to have life in East Lansing. Some disagreement. Some faculty feel that issue is more about being treated as special category.
		
		     ○ ***NOTED:*** *MSU fosters a hostile environment for faculty of color with seeming disregard for rank at time of hire. Part of it revolves around long-standing stereotypes re: the qualifications of URM faculty as "less than." Part of it involves dismissive actions by administrators and faculty peers about issues when they arise.*
		
		 • **Addressing challenges:** MSU can better promote contributions in urban research, history of firsts. Make work of diverse faculty, departments, research a bigger part of the MSU story. Hiring should continue to evolve. Not just straight from grad school, but recruiting from elsewhere. Cohort hiring.
		     ○ ***NOTED:***
		         ▪ *I think that this really depends on how contributions to urban research are defined. WSU is the urban research-focused university in Michigan and U-M has a deep urban presence as well.*
		         ▪ *The CSS is doing some innovative work in this area – we've recruited two cohorts of URM research associates who have several years to solidify their research in preparation for transitions into TSF faculty lines. The CSS also is in the midst of recruiting senior level URM faculty*

6	**Climate – Staff**	• No comments received
7	**Invisible/ Visible Needs in Physical Spaces**	• No comments received

Table 1 (cont.) Context for Planning: Michigan State University Trends- Topic 1

8	**Community Engagement**	• **Definition and metrics:** Need to make community engagement integrated across our strategic plan. Reflect all the ways we bring in research and teaching to community. Define what we mean by community engagement broadly and holistically, not simply a check box activity. But also identify metrics that show impact and account for work (e.g., in tenure and promotion). o **NOTED:** *Not sure what community integrated across our strategic plan means - How does this tie into the land-grant mission and its manifestation across all that is done at MSU*?
9	**Extension**	• No comments received
10	**Budget/ Finance**	• No comments received
11	**Enrollment Management**	• **Big questions:** To what extent is class composition a function of mission/vision/values? Should we become bigger and what are infrastructure limitations? o **NOTED**: *How does all of this look in this era of COVID-19? How does it need to look moving forward?*
12	**Student Debt/Financial Aid**	• No comments received

Table 2. Context for Planning: Michigan State University Trends – Topic 2

Topic #	Topic Name	Notes Summary
1	**Undergraduate Education**	• No comments received.
2	**Graduate Education**	• **Needs:** Research is essential to land grant mission; cannot retain research faculty w/o graduate students. Our graduate student population is half the size compared to Big 10. Need to invest in graduate student development - mentorship, shorter time to degree, support for DEI, professional development, alignment to industry. o ***NOTED:** Yet in some units, the number of graduate students is much larger than can be reasonably supported AND more precarious in the current climate because of the pandemic*. • **Considerations:** Address organizational structure of graduate school. Engage colleges in addressing needs. Consolidate and think through approach for online education at graduate level. o ***NOTED:** We need to also consider additional professional development for the faculty and staff who administer graduate education at the unit level*. o ***NOTED***: *Need a current inventory, can research and graduate education be done remotely? At field sites, in the lab, computer based.*
3	**Research Trajectory**	• **Review of mission goal** to be Top 100 Research University and competitive research standing. o **NOTED:** *MSU should make a conscious choice whether to try to advance its standing in the Top 100, work to maintain it, or be OK with dropping out of it. If we do nothing, we may drop out of top 100. It needs to be an intentional choice.* • **Challenges:** MSU research has grown (2012: ~500M – 2019: ~750M) but required lots of resources. MSU lacks characteristics of top universities: student selectivity, academic hospital, start-up packages for faculty. Spread too thin? o ***Noted:** Need to rebuild reputation of college on campus, need exceptional leadership.* • **Future:** More focused strategy should be considered. How does MSU become more competitive for NIH, DOE, etc. – and will this funding continue. Must always balance teaching, research and community. Need more start-up money. Public health + clinical is a growth opportunity. Must have academic hospital partner.

		o **_NOTED:_** _I wonder if the University would consider more targeted approach to areas of strengths across various disciplines. For instance, in a former institution, we had identified core areas of interdisciplinary research strength such as maternal health and perinatology; children's health and well-being, etc._ o **_NOTED:_** _We are strong in DOE funding; NIH is still a small minority of our funding and could be a growth area, especially in clinical and translational research (including translation to practice and to communities). We have historically assumed that greatly increasing NIH funding takes a large amount of start-up money and an academic hospital partner, but this may not be true. The top 3 NIH-funded researchers at MSU in FY18 were clinical and public health researchers. If we hired 30 more like those, we could increase MSU NIH funding by $100M/year, and the start-up packages are relatively modest. Therefore clinical/translational/public health research, if strong investigators are hired, has excellent return on investment (ROI) and is a good growth opportunity for NIH funding. MSU could consider applying for a CTSA again; NIH has indicated potential interest._ o **_NOTED -_** _To strike the following sentence from the summary:_ _"_Need more start-up money. Public health + clinical is a growth opportunity. Must have academic hospital partner."_
4	**Student Mental Health**	• **Future commitment**: Must be a university priority to address mental health of all students. o **_NOTED_**_: One of the biggest challenges is providing support to faculty and staff re: where to refer, how to respond._
5	**Legal Landscape for Higher Education**	• No comments received.
6	**4th Industrial Revolution Economy/ Digital Revolution**	• No comments received.
7	**Health Sciences: Connecting Strengths Across Campus**	• **Undergraduate education:** Health, well-being and resiliency – prepare students for healthy living ("dust off Healthy U initiative"). General education should include health wellness education. o **_NOTED:_** _Huge (sic) need for providing this for graduate students as well._

Table 2 (cont.) Context for Planning: Michigan State University Trends- Topic 2

8	**Residential Education**	• No comments received
9	**Research - Intellectual Capital**	• No comments received
10	**International Engagement**	• No comments received
11	**Educational Delivery/ Emerging Technologies**	• **Strategy:** Very important to MSU future. We need to determine overall strategy. o ***NOTED****: The support for this activity is pretty minimal here with limited quality control.*
12	**Arts Initiative**	• No comments received

SWOT ANALYSIS: STRENGTHS/AREAS OF DISTINCTION

What are some strengths/areas of distinction at MSU that create a strong foundation for future endeavor?

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

> ### *NOTATIONS:*
> o *It would have been useful to see a tallying of the mentions for each item area. This applies to all of the SWOT elements*.
>
> o <mark>*Additional content received that was noted as absent from the summary and SWOT Analysis.*</mark>
> - *There is an engaged and dedicated alumni body of LGBTQA+ Spartans, many of whom are donors to The LBGTRC.*
>   - *We have three LGBTQA+ specific scholarship funds and gave out $20,000 worth of scholarships to students for next year.*
> - *Campus partners have been very interested in doing the work of LGBTQA+ inclusion; we just only have so much capacity to meet this demand through training and consultation.*
> - *There is an appetite for policy change and inclusion on LGBTQA+ topics.*
> - *The counselors and clinicians who specialize in LGBTQA+ care are truly exceptional.*
> - *Our LBGT Resource Center is comprised of 3 dedicated professionals who work tremendously hard to support faculty, staff, and students, and to engage the campus in the work of LGBTQA+ inclusion and culture change.*

SWOT ANALYSIS: WEAKNESSES/AREAS OF VULNERABILITY

What are some weakness/areas of vulnerability we need to address for the university to thrive and be successful?

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

> o **Risk averse:** Not always willing to push the boundaries; need to be a "learning organization"; wish we could see challenges as ways to learn and grow, rather than as threats; need to seek out divergent opinions; practices not keeping up with the times – based on experiences that are historical and not well informed; not setting sights high enough.
>
> > o **NOTED:** *There seems to be a culture of mediocracy here across wide areas of the university.*
>
> o **Internal and external communications:** Poor internal communications – lack of clear messaging and coordination; insufficient crisis management and external strategic communications;

- o ***NOTED:*** *The current COVID-19 crisis underscores the lack of coordinated and sometimes contradictory messaging*.

- o **Mistrust of administration:** Lack of accountability; living in era of significant distrust and cynicism toward administration; leaders experienced turmoil of past 2 years differently depending on where we sit – haven't fully addressed and reconciled; lack of succession planning, leadership training; lack of transparency at all levels; history of weak shared governance.

  - o ***NOTED:*** *Often lack of clarity as to how decisions have been made, who has been privileged to sit at the table to make these decisions*.

- o **Bureaucracy/Lack of agility:** Too bureaucratic; problems of size, scope and scale: big ship, hard to turn; takes long to get to "yes"; structural silos run deep, creating dysfunction – ex: information sharing and hoarding; hard to find information - ex: rules for maternity leave: hard to find policies.

  - o ***NOTED****: The lack of nimbleness often comes back to bit us in the behind. The inability to find information quickly is troubling.*

- o **DEI (Diversity, Equity & Inclusion) approach:** No cohesive approach; lack of faculty diversity; must integrate into all strategic goals; reactive approach to diversity, rather than proactive; lack of representation of US people of color in administration, esp. Mexican Americans.

  - o ***NOTED:*** *There is an overall lack of representation of URM faculty, staff and students which may reflect the limited investment in DEI as a primary area of concern.*

- o **Campus climate and "safety":** Not a safe, welcoming, inclusive environment for many;

  - o ***NOTED:*** *We need to have a better understanding of what that means, particularly with the reality that a nontrivial number of the campus community could/do feel unsafe for multiple reasons because of the different identities they possess and how they are perceived on this campus.*

- o **Insider/outsider administrative culture:** Faculty and staff who feel excluded/disenfranchised;

  - o ***NOTED:*** *I've seen a number of people within my college who are totally disconnected. Some of them are going through the motions of fulfilling the duties of their positions but have ceased to want to do more (e.g., no interest in goal setting, innovation).*

Additional themes

- o Research: Zero Nobel Prize winners, few National Academies members; scholarly metrics (by size) at bottom of AAU;……

  - o ***NOTED:*** *Are these the only measures of research worth?*

- o Financial strength: Financially not as well off as some other institutions including U-M; limits opportunities; dependence on market return to finance bonds.

  - o ***NOTED****: I would suspect that this item would rise closer to the top of the list today.*

- o *There is a need for more comprehensive LBGTQ data in all areas of campus.*
  - o *i.e. enrollment, graduation rates, reasons for leaving the university, etc.*
  - o *With better data, we can be more informed of where resources are needed and how we can best support our LBGTQ students and staff*
  - o *This data would need to be guarded closely and strict regulations would be required on how and when to utilize this data*
- o *There is a need for increased resources for LBGTQ initiatives, programs, and departments on campus*
  - o *i.e. financial resources, human resources, physical resources, etc.*
  - o *As compared to other Big 10 and AAU Universities, MSU provides much less financial resources for its LGBTQ community*
- o *More resources are needed to truly create the support network and cultural change needed for our MSU LGBTQ community to feel included, supported, and valued. With more resources we would be able to move forward more quickly and effectively with many initiatives/programs, some examples include:*
  - o *Gender inclusive housing policies*
  - o *Work is being done here but with a larger team and more financial resources, we could be more effective in this process*
  - o *Training and consultation for MSU Counselors, Advisors, and many other support functions on campus*
  - o *More preventative work to identify and support those in need before they feel the need to leave the university*
  - o *The newly re-formed faculty and staff association, Employee Pride and Inclusion Coalition (EPIC), needs sustainable support.*
  - o *We need a gender and name change policy for faculty and staff, as well as alumni and donors.*

SWOT ANALYSIS: THREATS/ENVIRONMENTAL CHANGES

What are some external threats or changes in the environment that may influence our future direction?
> *NOTED: I wonder how all of these threats are currently viewed in the midst of the COVID-19 pandemic.*

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

- o **Domestic political polarization:** Increased polarization affects campus climate; increased violence and hostilities accompany polarization; perception of the university/higher ed as politically left-leaning.

  - o ***NOTED:** How does all of this play out in an environment of populist dystopia where there are increasing numbers of folks who have an anti-intellectual and anti-science bend? Who feel disconnected and undervalued and believe they are squeezed by members of the elite and elite institutions?*

- o **Public opinion of higher ed:** Growing public skepticism about higher ed affecting university resources, job security; challenges regarding contribution to society, value of degree, content of degree; questions about how higher ed is organized, about credentialing, about what we deliver for the cost; pressure to reduce the university to workforce development.

    - o *NOTED: Also tied to the rise in populism here.*

- o **Increasing online competition:**

    - o *NOTED: Those who do this well tend to invest more time and funding to produce high quality online products.*

- o **Uncertain international context/global risk**:

    - o *NOTED: This context and the US has changed given the orders to suspend any immigration to the US.*

<u>Additional themes</u>

- o New and disruptive competition: Competition from other sectors not traditionally in our space that we're not prepared to address; universities becoming more corporatized in decision-making and priorities, e.g. employer led education.

    - o *NOTED: This underscores the primary issue of the campus tending to be reactive than proactive; mixed messaging about innovation vs. maintenance of the status quo.*

SWOT ANALYSIS: OPPORTUNITIES

What are the greatest areas of opportunity that lie ahead for MSU? How would we convert the strengths, weaknesses and threats we identified earlier into future opportunities?

The items below were distilled from the synthesis discussion session at the planning retreat and from a review of individually submitted notes. They are ordered approximately by frequency of mention.

NO NOTATIONS RECEIVED FOR THIS SECTION