

## **SOUTHEASTERN PROFESSIONAL DEVELOPMENT PROGRAM (A)**

University staff worked intensively preparing for the fall culminating session of the Southeastern Professional Development Program (SPDP). This represented a milestone in what was considered to be a transformational change process that began in 2009. The final fall session now scheduled for November 10-12, 2011, would involve well over 100 personnel assisted by three facilitators from the Harvard Graduate School of Education (HGSE). Earlier sessions leading up to the November program were conducted in June and September.

The seeding process for the initiative took place throughout 2009 and 2010 as over twenty faculty, staff, and administrators attended a variety of seminars and institutes to lead and facilitate the change effort. Following reorientations of the Executive Team and Administrative Council, developmental sessions were conducted on a wide range of topics including financial fundamentals, strategic and operational planning, mapping and networking external relationships, and the changing higher education environment.

From spring 2010 through spring 2011, background materials and institution specific case Executive and Budget Committees, and the Student Government Association. The two case studies were titled SOSU and Oklahoma's Budget Crisis (multiple part budget and finance case) and the Southeastern Organizational Structure and Redesign Transformation case. Summaries and worksheets were carried forward from individual sessions in order to capture ideas and learning that emerged.

### **The June Meetings**

A preparatory meeting conducted on June 13<sup>th</sup> with the group facilitators (Attachment A) provided the packet to be used at the first major meeting on the 21<sup>st</sup> including a pre-briefing on the general session and suggested guidelines for advance preparation. The pre-briefing covered elements of how the program was part of the renewed initiative since 2009; how the initiatives reached a new point of convergence relative to development; the current opportunity to reflect on our contemporary leadership challenges; and, a reframing approach to organizational leadership.

Background materials and case studies were also included in the packet of materials.

This contained an introduction to the case study method and Southeastern's live cases and related materials. The real life cases and background materials involved a multiple-part case on SOSU and Oklahoma's Budget Crisis and summaries of work sessions for 2010-11 and 2011-12 as well as case study focusing on the Southeastern Organizational Structure Redesign and Transformation project (Attachment B).



In reviewing the Redesign and Transformation case, participants were encouraged to reflect on the following questions as provided on the final page of the case:

- What are we trying to achieve?
- What problems need to be solved?
- What areas of the University need attention?
- How good are our skills and our systems?
- Where can we use what we have?
- Where do we need something new?
- How do we handle the timing of implementation and the sequencing of action?

Also in preparation, individuals were asked the following: “reflect on how you will renew and affirm the centrality of what you do at Southeastern and what it would be like to be an effective change agent in reinvigorating and reinventing (transforming) yourself and your unit in the future.”

A facilitator from the Harvard Graduate School of Education (HGSE) assisted with the first major session on June 21. The session was designed primarily to focus on the following questions: (1) what is the central issue or problem posed (for your area/University)? (2) what frame (structural, human resource, political, or symbolic) would you place this issue or problem and why? The group facilitators were briefed on the use of structured group processes and discussion leadership and assisted in the feedback sessions both in small groups (issues, concerns, dilemmas—what does this mean for Southeastern? What does this mean for me?) as well as larger group discussions (feedback on case studies in general and individual group sessions). The outcomes helped to develop the common themes, direction, and primary takeaways for the September program. Based on preliminary results, it appeared that the common themes at the end of the day ranged from budget and morale to branch campuses and distance education. The study groups, including all participants, would now meet several times in order to fully prepare for the September session.

The next major briefing for the group facilitators was conducted on August 8<sup>th</sup> (Attachment C). The specific goal was to finalize preparations for action steps associated with the next small group meetings in advance of the major bridge session planned for September 30<sup>th</sup>. Three preparation questions were posed in advance to the group:

- Given the reassignment and integration of returning facilitators, are there any group members who should not be involved in the process?
- How will you, as a facilitator, present the action planning and implementation checklist—cite a few examples that you would suggest as you task your group with this assignment?



- What other information do you think would be helpful in presenting to your group in stimulating creativity for reorganization scenarios?

The background information for the session on the 8<sup>th</sup> covered the Small Group Participant List; the written narratives for the common themes identified from the session on June 21 (including seven topic areas with paragraphs of dominant written narratives); an Action Planning and Implementation Checklist; the Group Process and Task Statement; the SOSU Key Performance Indicators example; and, the current Organization Chart.

Particularly important to the process at this point was the action planning and implementation checklist and the task statement. The checklist task statement asked participants to choose one specific project that would enable the acceleration of capabilities to respond to future challenges. The task statement for the development of a reorganization scenario asked that it be timely, move the University forward with its transformational change process, and longer-term create the next generation of Southeastern leadership.

### **The September Bridge Sessions**

An advance meeting on September 13<sup>th</sup> of the group facilitators was devoted to analysis of the work to date in regard to action planning and implementation, reorganization scenarios, and key performance indicators. The action planning format involved a work out process that categorized the action plan projects identified by quadrant depending upon degree of difficulty/implementation and cost savings/value added to the University. The projects placed in two of the categories would be brought forward for the major session on the 30<sup>th</sup>.

The analysis of the reorganization scenarios were considered to be the most difficult and involved determining category and context (e.g., structural, process, and alignment); developing concise, actionable written descriptions; and, final review for implementation purposes. In comparison, the key performance indicators were straightforward as determined by pre-defined categories—University, Site-Delivery Method, Department-Academic/Staff, Discipline/Function, Course/Support, and Section/Unit (Attachment D).

The outcomes of the groups and analysis frameworks from the assignments were comprehensive. A final review team of six individuals analyzed all the input making sure that the entire documentation was maintained for future reference. The three steps initiating in June were coming together—action plans, reorganization scenarios, and metrics or key performance indicators.

My introductory remarks as President of Southeastern for the September 30<sup>th</sup> workshop centered on setting up where the initiative was at the point in time:



We are moving forward with tangible results and connecting the dots. Facilitators met with their respective groups and completed assignments using resource materials from the Action Planning and Implementation Checklist; Southeastern's Vision, Mission, and Strategic Goals; Dominant written narratives developed June 21; the SE Organization Chart; and University Key Performance Indicators.

A review team analyzed all input and categorized 33 short term (next 3-6 months) plans relative to their degree of difficulty/implementation and impact through cost savings/value added. In addition, there were 11 basic reorganization scenarios determined actionable over the short term.

We are now at the juncture of extremely critical work—prioritizing the short term action plans and reorganization scenarios. We will do this in our small groups and the group facilitators will report out during the general sessions. Our efforts today will produce summary results in preparation for the major session in November. Finally, before we start, let's emphasize several things—First, this is very tough, hard work requiring strength and courage—we need to step out of it occasionally from a personal and emotional standpoint—this will add value to our discussion. Second, let's realize that the reorganization scenarios involve people, positions, responsibilities, tasks, and changes (it is more than moving boxes). We need to be especially considerate of individuals—be professional, objective, and respectful at all times during all our discussions.

The sequencing of the workshop on the 30<sup>th</sup> involved working the short term action plans in the morning and the reorganization scenarios in the afternoon. Both activities were completed with sessions involving the small groups first followed by the facilitators presenting in the general session. The focus on the two task statements used in respective sessions were those provided in the pre-work packet of materials:

- Using the attached packet of short term action plans, please list the one plan that you think will assist Southeastern the most over the next 3-6 months. Feel free to use the number (1-33) or combinations of numbers associated with the plans as well as a modified version of the plan.
- Using the reorganization scenarios provided as background, please use the space below to develop what you think would be the most appropriate organization structure for Southeastern at this time. Feel free to use letters (A-K) or combinations of letters associated with the scenarios as well as a separate description.



At the conclusion of the workshop, it was emphasized that all the results would be used in preparation for the culminating sessions in November. The key was to ensure that all materials and ideas were captured. My closing remarks were targeted to set up the work schedule in October by the study groups as well as the November sessions:

I would invite you to think about several things. Where do you think we are at the point? How are we doing? First, let's pause and acknowledge the efforts that have been made—celebrate the work that has been done—take a moment for recognizing, acknowledging, appreciating what has been accomplished. Second, we started broadly—now we are narrowing the focus—and now we want to enrich and elaborate on that—we are beginning to get a glimpse of what we look like 'when we are at our best.' Third, how do we make the most of moving forward? Let's keep opening the funnel more and more—how can we be more innovative using new ways of thinking, different mindsets and new mental models, operationalizing our ideas, and achieving break-through thinking.

We have used an updated list of Key Performance Indicators (KPI's) by category as reference—please forward any new KPI's that come to mind—and we will continue to update the listing. As you do that, consider the following questions—Have we been bold enough? How can we stretch performance?—5 year trends; Think of how we can move the dials forward? 5,000 enrollments by 2015—what if that was 6,000 or 7,000? How does the KPI support our strategic commitments? How does it support our mission?

Think about how we think!!---What would be the stretch goals so high that they would be at the very edge of what could be achieved with our existing processes—or even beyond our current processes?

Also, as the study groups continue to meet through October keep in mind the following questions: How can we broaden our choices from a University-wide perspective? How can we continue to move forward with the transformation? What would you like to tell your grandchildren about how you transformed this University? How can we stay on track in developing the next generation of Southeastern leaders?

We are not just prioritizing and ranking now---we are moving forward with confident patience that the power of what we put in place—relative to design, process, and people---can be independent of us in the long term.



ATTACHMENTS PLANNED

- \*A=Group Facilitator Pre-Briefing Materials-June 13, 2014
- \*B=Participant Materials Packet (Condensed) for June 21, 2011 Session
- \*C=Facilitator Briefing Packet-August 8, 2011
- \*D=Group Facilitators Pre-Briefing Materials-September 13, 2011 and  
Participant Materials Packet (Condensed) for September 30, 2011 Session