Vision

- Guaranteed job placement in every major
- PSU’s plan to assist students with choosing their major; a mandatory course to expose them to all majors - help students discover their place in the marketplace
- 14 week experience 24/7 without the party atmosphere; strong program of interdisciplinary academics with social experience in balance; safe, healthy environment; link students with opportunities for engagement
- Service learning and research in an integrated environment to be prepared for workforce and community with bold declaration and not all things to all people; continue to foster and work with the creative community that surrounds the University, become an open university and open laboratory; so every student has this experience, not just some; each program needs to look at pairing up with businesses in the community (within 2-3hrs distance) to form partnerships; add alumni base to community and go beyond 2-3 hrs; bridge the business and academic cultures
- Curriculum drives the vision, the challenge for students is why they are taking the courses, give them better sense of themselves, students are fractured, inattentive, lack context. Need a model to develop context. Want students’ work to have a relation to what they are learning; teach with thematic approaches. Put gen ed requirements in themes so students understand why they’re taking these courses. Want 10 interlocking items that reinforce each other. Very few of our 1st year students work, leaving 100 hrs free, according to our data.
- Ethical values and human relationships to better students, society, businesses; transdisciplinary model to support this endeavor; biggest challenge for businesses, proliferation of people who put themselves first, lost sense of community
- Choice between being comprehensive or 5-6 themes that we are known for. (Designing the New American University – Michael Crow). How to attract students to a remote area, to be attractive internationally with interconnected themes, to be recognized globally. Create memories, experience, pride.
- Team building within the university through clusters/themes.
- Environment, tourism drive economy, healthy people and places provide natural themes. Real estate is tax base. Michael Porter’s work on clustering – goodness/value, ROI, capability.
- Initial Clusters ideas
  - Arts and Culture, Environmental sustainability
- Health and Wellness
- Technology and Design – set aside space
- Education
- Rigor, relationships and opportunity
- Entrepreneurial technology
- Connect graduate and undergrad programs
- Justice and Cybersecurity relationship - technology, social science, criminal justice education, job training– overcrowded prisons; community policing; forensics – only one state lab for 14M ppl
- Inter-professional education
- Experiential learning and immersion experiences, adventure based learning; athletic training and messaging the academic value added; creating new programs that are not available in other states and affordable – cost matters; transformational experience for emerging adults; concern for student silos with work/study in one area, but across disciplines broadens experience and exposes students to more areas
- Applied research themes simulate the real world environment – making a movie
  - Break, then work in groups on:
    - Vision -> vision statement
    - Clusters-> 5-6 themes
    - Open lab-> how to flush it out, how to draw in community and students, create how we will be viewed for collaborative applied research opportunities
  - Keeping in mind entrepreneurial aspect, engagement, learning/doing it

- **Vision Statement**

  Plymouth State University is (aspires to be a) a visionary community where students transform themselves, and their community, through interdisciplinary and experiential education and forms innovative partnerships as a national (global?) leader in __________, ________, and __________.

  PSU will create and transform the community through partnerships as well. Transformational experience for the students and community, wholistic interaction. How realistic is it to be a national leader in three things? Three areas or more TBD by clusters/themes. By finding the unique niches, we can be competitive at the national level. Better to be excellent in a few areas than to just have a lot of areas, because we don’t have the resources to be best at everything. Challenge: what is our region? Must be national or international to exist. Can’t be comprehensive at 4200 students. Critical mass – 5-7K.

  We need to build on the existing foundation. Biggest challenge is how PSU is perceived. We need to see ourselves at that level in order to achieve it. Conflict in narrowing down the themes – too narrow? What are the challenges we are focusing on for the future? What is our role in the environmental sustainability; prison structure challenge? Public health challenges tied to
individual behavior and the environment. Interdisciplinary structures strengthen the core programs. About 5% of students are finding their way but we need to provide the structure and path. Our region as an asset, laboratory, tool, perk. Sales/marketing as a cluster because of our environment (commodity) to bring in business. Courses with basics tied to applications as in Ann McClellan’s course. Concerns with retention and attraction.

Students are not the only ones transformed, community (including us) is transformed as well. Add: Where students transform themselves within a synergistic environment. Add: Creating opportunity for communities through economic development, enrichment. Current vision statement is more about a sense of place – need to bring this into the vision statement. Easier to bring in the businesses than transform a place. Thinking mission is about who we are; vision is about our desired future state. Challenge with vision statements is that we have a hard time thinking about beyond where we are today. Have we been aspirational enough? What you aspire to be is who you are.

- **Clusters**
  - Identified how synergistic and integrated they are. Identified cross cutting dimensionality.
  - Outreach engagement

  - Creativity/innovation
  - Civic engagement
  - Applied service
  - Immersion experience
  - Sustainability
  - Organizational relationships
  - Synergy
  - Local to global reach (etc. to obtain from CV)

**Clusters/themes**

- Community Advancement and Entrepreneurship
- Science (and technology) Advancing Society
- Health and Wellness
- Justice and security; ethics
- Educational Leadership
- Innovation, Entrepreneurship and Economic Development
- Arts, design, communication and technology

Clusters need to be reinforced in the community i.e. oceanography, aerospace, biomedical, agriculture. Must be some critical mass that can resonate within the community. Need to map out these areas and future areas, with more overlap the better. Broad themes connecting the clusters, being able to integrate the community, getting
students and university community involved in each cluster. The extent to which we can realize this vision will help the faculty members to build their portfolios. Students want to do their work and find a job, lots of jobs throughout their careers, and we need to communicate this to students and parents so they see the value without becoming a career oriented institution. Liberal arts had applied elements where you could come out and find a job. Refer to Endless Frontier by Burke – incredible power from partnership between academia, business, and government. Liberal arts started as foundation to build your profession on. Connect learning to opportunity that exists in the workplace.

Pure research was funded by a patron. Practical vs. theoretical sides can be stumbling block. Pasteur was a challenge based researcher (Pasteur quadrant). Learn skills and how to think. Industry used to train people. A lot of CEOs came from a liberal arts background. Carry message out about hands on learning.

Training educators as leaders. Focus on quality and structure in teaching.

Tourism is a major aspect of our economy—captured this in community advancement and entrepreneurship cluster. Tourism/hospitality management should be a bigger part of what PSU is. Need huge influx of resources to realize the science aspect. Science meant to include environmental sustainability, and world class work that is already going on with policy and planning and meteorology. How could we make a national niche for us in biomedical research and technology? Think about the INBRE grants that we currently have. ‘Science’ includes social science, ethics, integrating community and technology. Technology also in arts. Applied integrated learning is included. Science as applied research and technology. A lot revolves around water – build cluster around this element? It captures things but what is our area of expertise, uniqueness? It is an underlying theme but is it a unifying theme? Experiential science or applied science in the 30 second PSU video. People collaborating, applied and experiential i.e. w/ Loon Preservation Society. Experiential crosses many areas, including social sciences. Health and wellness should be broadened to human and environmental including huge domain of public health, natural, physical and technological sciences. Also includes pre-med, pre-PT, organizational health (could be subpart of human health). How do pieces and parts of what we have fit into these clusters, and how community sees it. Community (impact, advancement) and arts clusters seem too generic. Wording may need to be tweaked b/c they are specific. Community advancement includes how does this build economic development, engage communities to include the kinds of work we are doing now. Trying to capture in the name of a cluster what we already have and aiming to achieve. Can we scan where we are deficient from graduates, what is completely new that the region needs? Can we declare a cluster in an area where we don’t have anything existing? When building a cluster you will see holes which can be filled; build on what you have to create something of value in future and to know areas you need to build up. A guide to building and growing areas. Recently, past five years, so focused on cost control. A lot of work to do to think from this new paradigm b/c we have operated on tight budgets. Trying to be comprehensive with limited resources. Opportunities for sharing and working together will be huge, new, good! How does curriculum shift and how has the process worked in other institutions. The most positive way this works is by shifting and planning existing courses, add courses but not as many as you think, reconfigure existing courses. Courses may become somewhat redefined through a gradual process. Digital arts media technology major – had students with gaming background, started adding gaming courses, then took arts course, software from movie courses and clustered the majors. Seeding courses to kickstart it, evolutionary process.
Energy – petroleum major, renewal energy/wind program.

Key hires in new initiatives with a few new courses.

Open lab – Immersion

Idea of a journey, with things moving in/out of this process. Students move in/out based on their readiness. Cross disciplinary (vs. interdisciplinary) – all immersed in this, not just students. Experiences, outside, distinct projects with student businesses. Capitalize on strong alumni based to assist/mentor students and use ways to allow students to produce things. Ways, places that different places could work together. Having places and resources (physical and intellectual) to produce an outcome. Open lab – blurring of boundaries between the university and external community that it’s serving so it’s taken as a natural part with in class and out of class environment and students get an actual chance to practice what they are learning in the classroom. Beyond being a faculty member teaching a class to mentoring, working with entities and their challenges relating it to what they are teaching in class. Students painted mural on historical building in Berlin, won awards, can now take this skill to any building. All themes are linked together to give unique classroom based and practical education. Similar to athletics – team building and leadership skills. Currently we feel every student should have service learning and capstone experience and create portfolios of their opportunities with meta reflection on their whole experience to carry to grad school, prof. development and job opportunities. Robust experience for every student.

Struggled with physical space – reduce silos, using space differently, how to engage external community members into the internal community (mile wide area). How to prepare students to integrate, coach them to be professional in a work environment. These skills should be part of the standard curriculum they are already getting. Think through what is a credit, can it be obtained in multiple ways/places. Break the model, or incorporate it into current structure. First year seminar, Interdisciplinary studies IS222 courses could be revamped to include problem solving, ethics, critical thinking, including experiential piece. Assume faculty members will engage with external community and each class will have that component, changing the culture. First year introductory course – interdisciplinary aspects of service learning, ethics etc. Need to look at how this connects with URSA metrics. Add opportunity to explore something that is not your planned major. Research projects and capstone projects with teams coming together vs. courses, common challenge. Faculty would need to work this way as well. Bringing together marketing, technology, and external organizations who provide feedback. Lab is more than a place and tools, a ‘bringing together’ component. Our gen ed concept is trying to do this through connections courses (wellness, technology). We may be doing this more than is realized, documented and may be due to non-full time instructors? OR due to not messaging this well enough. Somewhat of a disconnect between the full time advisor and teaching lecturers that are not around as much to share this enthusiasm. Not more work to do – just reinforcing what we do and it will be self-perpetuating. Easier as it forces synergy, not a trial, assists in making all the pieces fit together better. It will grow and build and everything will start to work and be less work vs. fragmented pieces. Complex pieces interconnected achieve more than any of the individual pieces could achieve alone. Would we be better to move into a more of a year
round cycle than semesters? Most universities have underutilized summers. This would work better and to get communities involved.

__________

**Linking URSA to our future state/concepts for moving into action:**

Thoughts: we don’t have the resources to be comprehensive, do fewer things to be exceptional and intentional
Talk about where we are, timeline and how it meshes with where we are today. Need to make these two parallel and synergistic processes come together.

Timeline – people are writing their reports. Report writer workshops were conducted in early June. Data not in from some yet to work on these reports esp. at the programmatic level b/c everything is by dept. Need to build systems and data to capture this. Hope to have all data by end of July. People can answer 2/3 of questions now but need more data. Evaluators have been identified. Credit and non-credit generating sets of reports. Two days of training w/consultants on campus. Near final drafts should be completed by then and shared with depts.

Working with faculty, reviewing and providing feedback to writers for finalization. Non-credit writers don’t have to wait for faculty to return/input their feedback. First wk of Sept. through Dec. – develop process, review reports and evaluate & score programs in the prioritization plus system (150+ reports). There will be observations, aha moments, not recommendations that will be captured. Dec. 23rd reports with observations will be completed, split into quintiles – (add these). Placement in any quintile will result in recommendation for increase support, consolidation or reduction. Reports completed in Sept. will be on website. Reports sent to cabinet will be evaluated with their areas, for recommendations. Need to develop timeline for recommendations coming to action, in line with budget. Some things have been implemented already based on data received. If there is a student in the program, they will teach it out, or move the student to another appropriate program. Have discontinued some programs with no students. Implementation ranges from immediate to a couple of years. How do we integrate the ideas from this retreat with the URSA process.

**How does URSA integrate with feasibility?**

Where do we need to make investments with philanthropic efforts? Where do we want university to be in 10 years? Hire a consultant to test all of the needs of the university. $1-1.5M raised per year. UA staff and President Steen had 76.93% increase in fundraising this past year. Feasibility study said $25M could be raised (vs. 1.5M). Philanthropic community wants to support these initiatives. Goal now $2M and is doable. How to think about demand, know we need equipment, building renovations, AW additional fields, MWM additions, Hyde renovations. Want volunteers to ask: How can I help you? Example: Nursing director asks how to help – pitched to hospitals chief nursing officers, and then they asked the CEOs of their hospitals who are giving $100K each for each of 5 years. Not asking for leap of faith, please jump in.

Part of the observation of URSA is the cross-divisional nexus. Seeing efficiencies, areas of symbiosis to build on and create a culture of experimentation. Fantastic x-ray vision, university wide will assist in creating these clusters through information we’ve never seen before. Took every single course looking at the credit hours
generated by each. Not perfect, when it comes to multi-disciplinary courses, but we had no evaluation process. Years of data varies from 1-5 years.

Are we looking at teaching effectiveness to determine which programs are successful? There are a couple of questions on quality of instruction, measurable outcomes, and external demands, retention and graduation rate. There’s data that would be ideal that we’ll never have; data that we could have. We will revisit to build systems in order to have that data. Data management system is needed for this analysis.

When a report is filed, is one number that comes up a total? Only people that see the scores are evaluators and they are confidential. Every program report will be read by Deans, Dept. Chairs, Provost to determine what can we do better, and can get quintile which shows score and indications of what they are doing that is successful. Quantitative data can be used for comparison amongst the institution. There will be a study to do a strong breakdown of the quintiles. Opportunity to dream and ask philanthropy to address what is needed to realize these dreams. URSA process can be threatening, intimidating as we are being judged, ranked, so it’s nice to see this positive link to advancement. Looking at strengths, challenges, weaknesses to identify where resources are needed going forward in the clusters.

If a program is in the 4th or 5th quintile, it’s a perfect opportunity to reinvigorate it. Who and how will this synthesis occur? Been told to put their programs in the best light. Will URSA evaluators do same? Or just scoring on their viewpoint, passing to cabinet, then where does it go? Evaluators do not make recommendations. Discussions will start based on program evaluations. Evaluators will be reading all 150 reports and will have an awareness of patterns. Even while writing the reports, it becomes apparent what needs to be changed and what the future of the discipline may be, where collaborations could work. Ten evaluators reading all 150 reports.

How will resource allocation work? Has started in the fall in the past. If URSA reports are done end of Dec. is this leaving enough time for budget completion in April? Some things (non-credit generating) will happen quickly and many won’t be able to implement for 1-2 years. At what point does the vision cluster process coalesce with URSA?

We are shaping what PSU will be about, looking at what will be eliminated, continued, opportunities that we have. Could eliminate a program but it might not eliminate a cost. Want to keep cost structure reasonable in order to make investments in areas identified as key to the future. 14/19 campuses in University of PA system shrunk 22% by eliminating courses, still have fewer students, consolidated but still have faculty. Looking for transference of expertise into areas that are productive for the future. We need to work on programs that are in harmony. We need to adopt the viewpoint that we need to do something differently vs. just cutting. What is the role of these two processes and how do they fit together. We need to increase the revenue from each dollar investment. At Behrend, they cut programs that were marginal and invested in programs with opportunity. There are programs that have an ROI that are not profitable. We may have programs that are just here, not bringing students in. How are we meeting needs of marketplace of the future? We may find programs that are in 4th quintile that are bringing in students. Clusters allow programs to be part of the attracting students process. We will not be able to cut programs enough to stay within cuts in funding from the state. Shift courses and
emphasis into areas that leverage clusters to give more bang for each expense buck that we have. Reorientation so ROI increases so we can fit in a declining economy and reduced funding.

We need a better view of where we are on grad revenue, undergrad revenue, what is our need from grants, sense of goals. How to financially report ROI from clusters? Need predictive viewpoint for potential on ROI in next five years. Sum programs that are a part of the clusters to get ROI. Need to project the opportunity for ROI.

What happens after this retreat?

Still determining whether it is best to integrate this process into URSA or work in parallel. This is a preliminary look at what we can do going forward, just getting this discussion started. Think and talk in groups, spread the word throughout the institution about the direction we are thinking of going. Would like to combine this element of thinking of clusters into URSA. Part of starting this now is to broach the idea of these concepts, how does it fit in the community, who wants to engage in this, how does it fit in URSA. How does this cultural change and way of thinking work.

Focus 2020 – current strategic plan. How does this fit in? Chairs are to look at how their programs fit into the current mission statement and Focus 2020.

Today, we are putting everything aside and asking what would you want to be doing. Let’s move toward inspiration and get something going to be excited about.

These are questions (URSA) and the strategic plan is the plan. Nothing wrong in continuing to use these, not proposing a u-turn, we are trying to go beyond that, build on it with all the pieces. Building excitement, will bring others into the discussion. Aspect of inspiration may be the most important for students, faculty, staff, words that we commit to should be a rallying cry.

Wrap up:

Goal is to start thinking about what Plymouth should be and spread this to groups that you work with. Want people to understand philosophically where we are heading. This is the start of the process of conceiving of the Plymouth we want to be a part of, thrilling, grows, builds.

Hope that you will take some of things in the notes that will sent out by Pat. Take concepts, clusters ideas and get feedback. To incorporate within URSA or separate process. Needs to be something we all buy into. Can be too top down. Admires broad, participatory process of URSA. Reflect, think about best way to go forward in this Plymouth community. Give suggestions how to go forward, make this a reality to get this laid out within the next six months. System strategic plan is in Sept. and will be good to have some of this in place. Talk more tomorrow. Cabinet will work in next few weeks to frame things. Many faculty not here in summer and they are critical. How can we communicate to them? Use this time in summer to figure how to proceed and get word out.

Campus Retreat
Reflections

1. As you think about yesterday, what resonates the most that links back to our core values or core principles? One word or quick thoughts
2. What most excited you?
3. What surprised you or concerned you?

As you think about yesterday, what resonates the most that links back to our core values or core principles? One word or quick thoughts

Opportunities for students
Integration to maximize student outcomes
Students first
Why students want and need to come here to study, Plymouth
PSC, PSU, now PSU 2.0
Service to students, community, ability to tie together pieces that we already do – intersection
Ethics
Community is so important to us
Community and how we defined it, as campus, town, towns and broader
Transforming, changing, status quo isn’t good; how to transform the community
Engagement – currently value the engaged student
Sense of opportunity and enthusiasm in this room, thinking big picture, bodes well for future
Building on our strengths, not inventing something new
We were not focused on just next two years, global not just regional
Silo term may become obsolete,
Interdisciplinary may force some to stretch
Advancement – focus and realize we can’t be everything to everyone
What do we dream of for students, esp. in tough economic times
Visits with families show that they have dreams too, and we need to bring that to reality
Silos are in classroom and out of classroom, bring partnerships with staff
We talk a lot about core values, like grabbing jello, exciting to get clear idea of our core values
Aspirational vision with global reach
Commitment to new, clear direction
Conflicting ideas, more debate towards positive goal
Current core values not clear enough for moving ahead, problem solving. Need this for a pragmatic framework to trickle down. Evidence based concepts.
Give students real life experience with open lab preparing them better for business world.
Shocked by how quickly this room came around to ideas of clusters and speed of implementation
Excited about URSA connection and the ability to actually apply these concepts

**Surprises, concerns:**
Focus 2020 – this all links well to its guiding principles. Challenges were culture that supports the will to make these changes. Hope to continue to talk about culture and will.
Enjoyed the 50K foot discussion, but how does this translate down to daily work
Steve’s reaction to the topic of transition of URSA into funding disbursements, and how to apply the changes within the time constraints possibly costing more than it will save
Massive structural change of how we do everything. We have tried structural changes that made us unsuccessful before. Want to know how to make these radical changes.
We rushed through clusters, need to look deeper at threads of connection. Package it differently.
Need to dig in to a richer analysis from risk and capacity perspective. Didn’t get to visionary part of clusters.
Bottom line view – will this create interdisciplinary program potential and will it create a bottleneck at IS.
Surprised at refreshing candor by Don, say it like he sees it. Demand for a wholistic vision throughout our process. Surprised at intensity and happy about it. Recognition of union component.
Cultural – lost a lot of beautiful people in our community, retirement, lost a lot of brain power. We need to talk about this and naturally move on, and not talk about pain, suffering, tough decisions. Can’t really move forward without acknowledging this.
Excited about the future, concern that there are lazy people and not a buy in from them.
Concern from personal values point of view. Faced decision as educator about where and how to work. University as a pedagogical experience – no mention of the life of a faculty member in this larger picture. What other models work but are different?
Concerns – Momentum and institutional will.
Did we overlook the graduate program? Lots of differences to consider.
Suggest that we should partner more with where jobs are, where society is going, too much from university perspective.
Collaboration in new ways and increased collaboration in ways we hadn’t thought about

Describe in one or two words. What happened? What is he like?
Get ready ;)
Shaking up
Transitional
Visionary
Exciting
Hopeful
Discovery
Supercalifragilisticexpialidocious
Incremental change
Positive
Refreshing candor
Rethink
Golf shirts
Future focus
Reenergize
Good group
Opportunity
Get ready
Future focus
Wow
Focus excellence
Big changes
Cautious optimism
Teamwork
Creating opportunity
It will happen
Informed examination
Inspiring
Together
Collaboration progress
Expertise
7K students
Interdisciplinary approach
Teamwork

<Break out into group discussions>

**Clusters Review:**
- Justice and Security
- Business, performance, Innovation, entrepreneurship, economic development
- Creative Arts, Technology and human enrichment
- Human and environmental health
- Leadership, human development and community impact
- Sciences and societal change (incl. political, social, computer, natural, hard sciences)

Name to be a call to action to the faculty to see if they can understand how they can contribute

Ideas that innovation and analytics (common themes) should not just exist in one cluster

Broad language to identify clusters b/c you may be in more than one; may move amongst them
How to implement this into curriculum, make it a reality. Educational tracks which encompass several majors with a common theme. Grad students can play a key role within the clusters in making it work and providing capabilities for them as well. First year seminar may be to aid students in picking an area they want to work within, and then find their way through the tracks. Julie to work with Janet and Pat to form a draft to help develop this concept, to communicate it to others that are not at the retreat. Pat and Janet to post this on the web. Open communication will be critical for cultural change. Make sure it is on myplymouth only, not public access.

If we push too fast, too far, won’t work. It can only go as fast as the culture can handle it.

Vision Statement:

Plymouth State University is a visionary institution where students transform themselves and the community through interdisciplinary, experiential learning and innovative partnerships and serves the world as a leader in (Cluster names) education leadership, health and wellness, community advancement, experiential science, justice and security, and artistic design.

Community encompasses all, not location specific. Sense of community, and the world is our community. Serving the world to be the focus. Do we want to include the expectation of the student, community in the vision? i.e. student will be a leader in a global economy and what the result will be of our transforming the student and the community. Serves the world is a result. Should tell us where we will be in the 21st century. Great start to get a lot of people thinking along with more definition on clusters.

Open lab review:

Experiential education where students learn through explore/pursue their passions through mentored, real experiences with partners preparing to impact the global community.

Thought about what are implications of the open lab in light of the curriculum. Students will only do it if they receive credit. Financial aid may be mentors. Physical space, problems to solve for external partners. Switching paradigm and cultural change. What are immediate next steps. Need to determine where these real experiences are already happening. Database of existing partners. Where are the existing skill sets to help in this. How can we be an ambassador for this?

Take the action items and explore where this can go, involve others in the discussion, so when we get together again, Don can visit the groups and see where we are at. Going out with this to small groups will help when we get to more formal roll out. Think of clusters with smaller groups within them, and how this will operationalize. These small groups are the working parts that make the cluster idea work. Think about how open lab is the implementation of the cluster framework. We need a concerted vision to be ambassadors. Front loading with reference points, intro, context, articles to be sent to the rest of this group. At least, an intro and background from Don to preface the document that is produced from this retreat. Gentle reality, faculty has had a difficult
year, in middle of year, has met with faculty this summer on their feedback. Some sad, hurt, sensitive faculty are not under contract.
Goal here is to use the URSA process to feed in and blend to give direction so URSA focuses on transition, not so much on cutting. URSA gives hope in this process. We will be transitioning, taking resources and people into something new and brighter for the future. All things fit into the community in synergy, each part of the bigger vision. Honest and open about areas that fit into this vision. Would like all this to be in the introduction. Suggest memo to community about the retreat, beginning discussions, and sets the tone for us to be ambassadors. Good point, we can do that. Opportunities for growth will be a different tone. Has been a painful process to get to this part. Turn this into hope for the future, with new opportunities.
Would be beneficial to have at least an outline of a plan to get feedback from larger groups. Want to be able to point to people where they will get a chance to contribute (no pre-tenure faculty here).
A sense of a general timeline from a change management perspective would be helpful, we want participation. Some people might dig heels in first if they don’t understand the process, but don’t want to box people in either.

**Action items:**
Goal – at least 10 activities or initiatives to work on going forward
Think about these key points-
- Communication – what we do, how we do it
- Process
- Inclusiveness

Brainstorm 10-15 min.

1. Ambassadors
2. Produce document summary with intro by Don, publicly available on web
3. Sketch timeline parallel to URSA timeline
4. highly organized communication work group with place to provide feedback -URSA communication committee has been a gem; repurpose that group for this, wonderful blended group or start a new group; allow people a process or place to provide feedback where seen by all, blog? Transparency! Need space for conversation. Schedule places and times where someone can facilitate conversation. URSA has established website with archiving materials, FAQs, ask Qs on blog, weekly reports, contacts of URSA members, campus wide forums, invited ppl to ask Qs, reports to constituencies, Ph1 report to campus
5. Repository of information – to be a centralized location for all this data to be available with all existing partnerships
6. President’s blog
7. **Identify external stakeholders** - Bring community players in. URSA is very internal thing, at what point did external groups come in? Sooner the better. Want some place in region where community sets aside place for businesses to work.

8. **Create workgroups** - At what point do we create workgroups to keep this going, who will be part of this.

9. **Perpetuate momentum and structure.**

10. **Inventory current partnerships** - Large groups of internship partners that has been decentralized

11. **Culture process systems baseline audit** – concept of resources matching expectations so we don’t add more to already tapped people. Lots of processes and systems that already in place, some no longer used. A lot of activities going on might not be the right ones. Going forward, don’t want people doing more, just different. Streamline, be proactive so reactive things are no longer taking up all of our time. Focus as a university on what we want to be good at, make what we do more fun, and not so pressed for time. Baseline audit should include asking what do we really need to do, and what can be eliminated. Ingrained behavior needs to be changed. We are a culture of yes and we can always do one more thing. Never been anything drops off that plate. Most important transformation will be that as individuals we will develop individual employment priorities. This new process will be attractive to faculty. Strong encouragement for focus groups for two-way conversation.

12. **Data component** - To help prioritize what is needed not only student but community perspective.

13. **Decision making map** – how clustering will integrate with URSA; when, how decisions will be made

14. **Project management tool** - Need data to give clear understanding of where systems are going

15. **Branding this new concept**

NOTE: Request for student involvement in all

Discussion re: any of above 15 items that could drop off. Audit seems internal. Inventory current partnerships – remove or put as sub-item for #5.

Any sense that this is a very successful approach to solving hard problems that PSU is facing?

Not sure if we can determine successful yet. Can we have two processes concurrently—too much, should we wrap this into URSA? With URSA process, once reports are done, 10 evaluators will have tremendous amount of work this fall. Reporters are concerned about their part. Presentation would be natural fit on faculty day. Wider campus should be thinking about ___? Not so much about doing the evaluation, but using URSA information to determine where we go with resources, focus and strategy for the process. Interchange to utilize information to determine area that can close down, transfer, combine with a cluster. Revenue projection reports could show the vision of growth and expansion. As we are called to be ambassadors, and share that yes, some programs may be cut, but people may not be losing their jobs. Share that program may transform and not be cut. People are talking about getting chopped, worried about their jobs. Fear that if we start to be ambassadors, will it divert ppl from concentrating on URSA. Need message from Don now that he is not looking to cut, impressed by broad buy-in, where we are taking university. Can we wait that long (faculty day)? Healthy process should include traditions, transitions, visioning
transformations. Must happen in balanced, inclusive dance. 3-T process. URSA is review and strategy. URSA gives our new pres. opportunity to work the strategy component of the process.

Believe there should be separate but joined processes. Could find people interested in this new process along with some URSA members. Important to show these are different but absolutely linked. Need to clarify relationships.

Disagree - People involved don’t have to be part of URSA. This is an opportunity to bring new ppl in.

Should be seen as the next phase of URSA, as it was seen from the beginning that things need to be done differently. Melds perfectly with direction we need to be going.

URSA as is, only takes us so far, providing info for next steps. Sequencing as opposed to a parallel.

Important that we leave knowing that URSA is a tool to inform us about who we are and what we are to do; this will catalyze us to a visionary change for the future.

Faculty day can be a time to start the academic year thinking about vision on a hopeful note. A collective meeting of Chairs may not even be possible.

Can’t wait, we need to think of ways for all community, not just faculty, to talk about this.

Powerful, exciting discussion but is this fabulous info seeping out, before summer ends meet with depts. Need to collectively decide how this information goes out from here today.

It’s been called faculty day, but may need to call it something else b/c all campus is invited anyway. Asking Mark and Jim if we are too far in planning to shift this to a community day? Thinking we can do this, not too late.

Rather have this umbrella of overall vision in remarks for each speaker. Already a scheduled day with a captured audience.

Do believe we should leave here as ambassadors. Word will get out, be ready to talk about this in a positive way.

Five phases for URSA, ending with decision making and implementation. This is not a parallel process.

URSA has been tainted from a student perspective. Emotions attached to it regardless of the good work happening. Might lose significance of the total break from the way we have been doing things.

Timing of the announcement of URSA was seen as a reaction to what happened last fall. Need to be clear that everyone is invited to community day, not that staff is invited to faculty day.

Not a good sense of last two phases of URSA, process lacking focus on those phases, seen as a cost cutting process. Connection to URSA provides comfort, quintiles will inform us on each programs strengths/weaknesses to determine how to transform.
Exciting discussion, wording of clusters still hard to comprehend, a lot we already do, taking what we do and re-organizing it. Gives us a degree of focus on results. Greater interdisciplinarity is an important by product of URSA.

Also gives us opportunity to show greater community what we are about.

URSA as a process to collect empirical data. Need orienting themes, to build from that. This is deductive analysis providing texture and meaning to how the URSA data might be used.

We have put framework, understanding and vision around Phase 5 of URSA.

**Summary of this --**

We will be ambassadors to begin next phase to extend vision and framework to transform the institution into a future state.

Community day – launching pad. Don’s remarks, 60 min., to frame this as to why we need this change, who we are, contextualize it. Jim nominated to write talking points. Message from Pres. Office to show that it is for all to attend, at least the remarks by Don.

Need timeframe for message from Don and posting on the web. We will work to do this before August 1st.

Include student leaders in community day.

Closing –

Never seen a group as engaged, dedicated, honest and open-minded.

**Retreat participants:**

Ben Amsden
Grady Arnao
Julie Bernier
Donald Birx
Joe Boyer
Sam Brickley
Sherri Covell
Terri Dautcher
Chris Drever
Brian Dye
Mark Fischler
Rich Grossman
Deborah Grothier
Thad Guldbrandsen
Paula Lee Hobson
Eric Hoffman
Darcy Hoffman
Lu Ann Humphries
Jim Hundrieser
Caryn Ines
Babs LaJeunesse
Linda Levy
Eric Lozzi
Patrick May
Barbara McCahan
Ann McClellan
Gail Mears
Laure Morris
Andy Palumbo
Robyn Parker
Christian Roberson
Jonathan Santore
Lindsey Stepp
Steve Taksar
Marianne True
Ava Tyler
Cynthia Vascek
Laurie Wilcox

Also in attendance: Office of the President staff – Janet Capaul, Laura Hinman, Pat Bahr