



collaborative on academic  
careers in higher education

# 2020 Strategy Workshop Workbook

## Strategy Workshop Workbook

This booklet is designed to help you develop strategies for implementing your vision for the next year of your work with COACHE. More importantly, this booklet is a place to document your steps and build an accountability plan that you can share with others during the session and with your local teams at home.

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## Considering Your Approach to Communications

### *Why this matters...*

Regardless of where your institution is in the COACHE process, communication with your faculties is critical. Implementation of any initiative at a college or university will wither on the branch without faculty engagement. Yet, one only needs to look at the Chronicle or Inside Higher Ed to see a pervasive narrative that faculty and administration are struggling to maintain healthy partnerships. How we communicate to faculty sets the tone and establishes trust and accountability.

### *Promising practices*

- **Vary the message, the messenger, and the medium.** We often think that a single email (sent repeatedly) or an all faculty open forum is the best way to reach our faculty. Yet we also have a sense that there are some faculty who never open those messages or attend those events. If we work under the assumption that there are many faculties and they will have differing priorities, interests, and concerns, then it only makes sense that we try different messages to reach them. The same can be said about the people delivering those messages. In some cases, an email from the Provost will work. Other faculty respond when they hear from colleagues. Shifting the medium helps reach faculty who might be unwilling to speak at a forum but are willing to comment on a shared document or a webpage.
- **Focus on process.** One of the most common complaints we hear from faculty is that nothing is ever going to be done with the data. Sometimes that is the case but more often, faculty are unaware of the work because we don't communicate the process. If faculty believe that a presentation is a standalone meeting, then they are less likely to attend. Conveying the steps along the way and *the steps ahead* make the case that this isn't just a PowerPoint presentation that will end up on someone's desktop.
- **Make your plan longitudinal and iterative.** Connected to the previous practice is the idea that communication plans need to be built out over time. Perhaps more important is to give yourself permission to change those plans based on what you learn from your faculty. Then, tell your faculty about those choices. When your faculty hear that you are making adjustments, it is a signal to them that you are listening.
- **Plan for feedback.** Rarely if ever do we define an effective communication plan as one-directional, yet that tends to be a common approach. This seems even less logical in higher education where we are surrounded with highly intelligent consumers of data. When we push content out instead of engaging faculty in generative discussions, we are treating faculty as problems to be solved when we should be leveraging them as problem solvers.
- **Set goals and identify measures of effectiveness.** As you build your plan out, ask yourself what you think an engaged faculty discussion might look like. What are the metrics that gauge engagement for each communications channel, and what benchmarks do you want to set as goals that might indicate an effective effort?



*Who are the potential messengers at your institution? What type of influence “power” do they wield?* This could include your COACHE team members, but also consider involving constituents outside of your immediate working group.

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*What might be some key messages you want to convey given the phase of the COACHE process your institution is in?* See Appendix B for some recommended communications milestones and sample communication methods.

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*Which framework from Appendix A might be best given your institutional climate and audience?*

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*What methods might you use to solicit faculty feedback? What do you need to learn from your faculty in order to achieve the goals you've expressed? Make sure to only ask for feedback that you can use. Circle back to the team page and consider the people who skills might help you dig into these questions.*

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*What channels of communication are available to you? Ex. email, intranet, provost/academic affairs/IR website, faculty lounges, department meetings, community meetings, newsletters, etc.*

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*What is the institutional context of your communications? Think through the calendar for the next year and consider where discussion of COACHE might be advantageous.*

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## From strategy to tactics

### *Why this matters...*

We all know what happens to the best laid plans that we develop at conferences. Even with the best of intentions, there are many other competing priorities that get in the way of our work. We know that when we work with faculty process matters. How we engage them is just as important as the topics we discuss. When we come across as disorganized or haphazard, it diminishes faculty trust.

To that end, this last section is designed to organize and layout as much detail as possible for the next several months. The following pages are set up to help you map your preliminary communications plans. Document what you plan to do and who you might need to support you in that work.

### *Promising practices*

- Share your plans with others. Be transparent with your team.
- Be iterative. No one expects to develop a full plan in just a few hours. Bring this back to your team and encourage them to help you build it out. You may even want to work through some of the exercises we completed today with your local team.
- When you and your team become comfortable with your plan, consider the aspects that should be shared with all of your faculty. Sharing your plans demonstrates a commitment to a longer strategy.
- If you are engaging senior leadership in your plans, you'll want to prepare them well in advance. Getting on their calendars earlier gives you the ability to prepare them. When their message is consistent with the rest of your team, it lends credibility to your work.

### *Questions to consider*

- What aspects of the work are your responsibility, the responsibility of others, or shared?
- When building out your timeline, have you kept in mind, the typical ebbs and flows of the academic year? They can impact your work and they can impact your faculty.
- As you share your plans with your partners, ask them to point out opportunities that you might be missing.

## Communications Action Plan

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**Recipient:**

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**Messenger:**

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**Core Message:**

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**Feedback requested:**

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**Channel:**

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**Context/Timing:**

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**Recipient:**

**Messenger:**

**Core Message:**

**Feedback requested:**

**Channel:**

**Context/Timing:**

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**Recipient:**

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**Messenger:**

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**Core Message:**

**Feedback requested:**

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**Channel:**

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**Context/Timing:**

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**Recipient:**

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**Messenger:**

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**Core Message:**

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**Feedback requested:**

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**Channel:**

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**Context/Timing:**

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**Recipient:**

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**Messenger:**

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**Core Message:**

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**Feedback requested:**

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**Channel:**

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**Context/Timing:**

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# Appendixes

## Appendix A: Communications Frameworks

	Goal	What faculty hear	How is initial information shared?	How will the findings be prioritized?	How will decisions be made & communicated?
<b>INFORM</b>	To provide stakeholders with balanced and objective information to assist them in understanding the problem, alternatives, or solutions	We will keep you informed.	The results will be posted on the faculty intranet.	We will share information on how findings will be prioritized.	We will share information on the decision-making process.
<b>CONSULT</b>	To obtain feedback on analysis, alternatives, or decisions	We will keep you informed, and we will listen to and acknowledge your concerns, and provide feedback on how your input influenced the final decision...	... and we will host a town hall meeting for all faculty to hear your thoughts and insights.	We will seek feedback on priority-setting and will share information on how findings will be prioritized.	Your feedback will help guide how we address specific issues and will inform decision-making.
<b>COLLABORATE</b>	To work directly with stakeholders throughout the process to ensure that mutual concerns are understood and considered	We will work with you to ensure that your concerns and issues are directly reflected in the alternatives developed and provide feedback on how your input influenced decision-making...	... and we will have small group meetings to inform our approach to specific issues that have been identified.	Feedback from town hall and small group discussions will be directly reflected in priority-setting and decision-making.	
<b>CO-CREATE</b>	To partner with stakeholders in each aspect of the decision-making process, including development of alternatives and identification of the preferred solution	We will look to you for direct advice and innovation in formulating solutions and we will incorporate your advice and recommendations into decisions to the maximum extent possible...	... and each small group will focus on a major area to make recommendations on how to prioritize and approach specific issues that have been identified.	We will incorporate small group recommendations into priority-setting and decision-making to the maximum extent possible.	
<b>DELEGATE</b>	To place final decision-making in the hands of the others	We will place final decision-making in your hands...	... and those groups will decide how to prioritize and approach specific issues that have been identified.		

## Appendix B: Communications Milestones

	INVOLVED PARTY	MILESTONE	EXAMPLES	TOOLS
<b>Months prior to receipt of results</b>	Chief academic officer, COACHE key contact (e.g., vice provost, dean of faculty, associate dean)	CAO's and/or faculty leader's communication on membership and how findings will be shared and prioritized	Letters or emails from the CAO, newsletter blurbs, announcements at faculty senate or equivalent	Faculty Job Satisfaction survey administration toolkit, including sample email communications
<b>Initial weeks following receipt of results</b>	CAO, COACHE key contact, relevant officers in faculty development, diversity, IR, news/ PR, HR, board of trustees, accreditation team, et al.	Large-scale sharing of results	Posting full results, executive summary, or snapshot of results on intranet. Highlight institution's strengths and demonstrate commitment	CAO Report, formatted to maximize flexibility in how much detail to disclose at this stage, and to vary level of detail by audience
		Large-scale discussions regarding results	Town hall meeting (or other forum) to discuss results	COACHE newsletters, other members' websites describing data deployment strategies and results
		Discussions with peer institutions about ideas for action	Contact with peer institutions in COACHE to share ideas, challenges, and strategies to address the challenges	COACHE workshops and structured interactions; consortium or system meetings
<b>Months following receipt of results</b>	Chief academic officer, COACHE key contact, other involved parties	Smaller-scale discussions of results by stakeholder or affinity group; sharing information with larger audiences on results identified as priorities	Results discussion with department chairs, committee on the status of women, search committee chairs, et al.	CAO Report and other supplementary materials include example actions by members
<b>Ongoing</b>	Chief academic officer, COACHE key contact, other involved parties	Sharing information on action toward addressing priority items	Keep progress reports as recurring items in the faculty newsletter and faculty senate meetings	Search the Web for "COACHE" to see how members are keeping stakeholders apprised
		Organize and catalyze conversations around results	Create task forces, ad hoc committees, and blue-ribbon panels around the issues brought to light	See, for example, book <i>Governance as Leadership</i> for possible questions to catalyze discussion around results
		Conversations with COACHE institutions	Regular communication with peer institutions in COACHE to share ideas, challenges, and strategies to address the challenges	Events at APLU and AAC&U; consortium and system convenings; Year 2 Strategy Workshop

*Adapted by COACHE from AAMC's Faculty Forward Workbook, GFA Meeting, August 2009*