

West Liberty University

Institution: West Liberty University

Chief Executive Officer: Dr. Stephen Greiner

Date Submitted: May 11, 2020

Criterion 5C. The institution engages in systematic and integrated planning and improvement.

Interim Monitoring: WLU will submit a report that describes in detail the process used for preparing the next strategic plan and include identifying any consultants or facilitators involved in preparing the plan. The reports should also discuss KPIs and metrics used to measure success in achieving the goals. Finally, the report should include WLU's plan for keeping internal and external stakeholders informed regarding progress and adjustments to the strategic plan.

Preparations to create the 2019-2024 West Liberty University Strategic Plan began, in earnest, in the summer of 2018. In July of that year, [Dr. Jeremy Larence](#) was named the Assistant Provost for Academic Innovation and Strategic Planning, a new position created, in part, to address the Higher Learning Commission's concerns over West Liberty's strategic planning process.

Preparation

Dr. Larence spent the first month researching and preparing a collaborative planning process. In consultation with the [Provost](#) (Dr. Brian Crawford) and the [President](#) (Dr. Stephen Greiner), the final design was based largely on Patrick Sanaghan's model in *Collaborative Strategic Planning in Higher Education*. The plan consisted of [five phases](#): (1) Organization, (2) Data Gathering and Engagement, (3) Sensemaking, (4) Vision Conference, and (5) Goals Conference. In early August, Dr. Larence and the Provost identified sixteen individuals to serve on the [Planning Task Force](#): six faculty, four staff, four administrators, and two faculty with administrative roles:

- Billings, Kate: Director of Student Activities and Title IX Coordinator
- Cook, Jenna: Instructor of Mathematics
- Cooper, Katie: Director of Financial Aid
- Criniti, Steve: Professor of English
- Davis, Sarah: Assistant Professor of Visual Communication Design
- Halicki, Shannon: Dean of the Honors College, Associate Professor of French
- Harder, Matthew: Dean of the College of Arts and Communication, and Director of Music Technology
- Harper, Aaron: Associate Professor of Philosophy
- Huffman, Aaron: Associate Professor of Health and Physical Education
- Jesse, Gayle: Assistant Professor of Computer Information Systems
- Kefauver, Lucy: Director of the Office of eLearning
- Kuhns, Chad: Assistant Professor of Mathematics, and Chair of the General Studies Assessment Committee

West Liberty University

- Musilli, Laura: Manager of Grants, Institutional Advancement
- Rodella, Joe: Director of Information Technology Services
- Serra, Jon: Assistant Professor of Chemistry
- Sweeney, Sara: Director of Graduate Studies

An external consultant, [Kathleen McDermott](#), Director of Nonprofit Advisory Services, McKinley Carter Wealth Services, was hired to assist Dr. Larance with the facilitation process.

Phase I: Organization

On September 13, 2018, the Planning Task Force (PTF) met for the first time, for a training session to create a communication plan, to develop a work plan, to clarify roles, and to identify forums for engagement and data gathering.

The PTF identified nine stakeholder groups: (1) Administrators, (2) Alumni, (3) Athletics, (4) Faculty, (5) Parents/Guardians, (6) Local Community, (7) Local Schools, (8) Students, (9) Student Services. Teams of two were assigned to each of the stakeholder groups to collect data to help the PTF identify potential themes, goals, and strategies.

Phase II: Data Gathering and Engagement

From September 13 to November 23, 2018, each team gathered data from their assigned stakeholder, primarily through research, surveys, and face-to-face meetings. During that time, each team met with the facilitators (Larance and McDermott) to report on their progress and to identify resources they would need to complete their work. Final stakeholder summaries were submitted to the facilitators by November 23.

Phase III: Sensemaking

After collecting the stakeholder summaries, the facilitators synthesized the data into a single presentation for the PTF, the Provost, and the President. This presentation was given during the Sensemaking Meeting on November 29, 2018. After the presentation, the PTF identified four major themes: Academic Success, Branding, Operational Efficiency, and Student Experience. At the end of the meeting, members of the PTF broke into four thematic teams charged with creating concept papers for each major theme.

Phase IV: Vision Conference

From November 29 to February 6, 2018, the thematic teams researched their themes and developed drafts of concept papers. They were instructed to create concept papers that would be used to inform and educate stakeholders about their themes, especially for stakeholders who might not otherwise be familiar with specialized information related to that theme. Although teams were told that they need not follow a specific format, instructions suggested

West Liberty University

seven components: background, lessons learned, national trends, strategic themes, options, projected costs, and short- and long-term plans. On February 6, each thematic team met with the facilitators to report on their progress and to identify resources they would need to complete their work. Final concept papers were submitted to the facilitators by March 1.

On March 29, 2019, the Planning Task Force hosted a Vision Conference that included a large set of stakeholders from across the university community, participants reviewed the concept papers before taking part in various exercises designed to create a “Preferred Future” for the university, ideas for the first draft of the strategic plan.

Phase V: Goals Conference

On May 3, 2019, the Planning Task Force created a broad implementation plan for the institution, creating a set of strategic goals and action plans for each strategic theme: [Academic Success](#), [Branding](#), [Operational Efficiency](#), and [Student Experience](#). Following this conference, Dr. Larance reconstructed the broad plan into one [coherent document](#), a detailed implementation plan designed to blueprint to guide, motivate, and support West Liberty University’s strategic planning initiatives over the next five years.

Publicizing Progress and Adjustments

In the spring of 2020, the Provost's Office created a series of spreadsheets to track the progress being made for each goal, initiative, and key performance indicator. Dr. Larance and Maureen Golick, the Assistant to the Provost, are responsible for maintaining these spreadsheets and staying in contact with the responsible parties.

In July of 2020, the Provost’s Office will publish its first progress report on the university’s strategic planning website (<https://westliberty.edu/planning/>), with updated reports expected approximately every six months thereafter. These reports will include assessments of completed initiatives and updates on the progress being made on the remaining initiatives.

As progress is being monitored, the Provost’s Office will periodically reassess the strategic plan and, when appropriate, recommend revisions and adjustments. Ultimately, any substantial modifications to the strategic plan must be approved by the President’s Cabinet and the Board of Governors.