

## *Toolkit for owners and co-owners*

# Conversations for strategic intent

*College of Agricultural Sciences*

*Oregon State University*

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## Context

The mission of the College of Agricultural Sciences (see below) in teaching, research, and outreach has remained consistent throughout its history. The College is a viable and valued organization because we anticipate and respond to dynamics of the world in which we carry out our mission. Changes—in the constituencies we serve, in the nature of Oregon agriculture and natural resources, in pests and diseases that affect plants and animals, in new and emerging scientific frontiers, in revenue streams and funding sources—these changes and many other factors influence the College’s strategic directions.

We last articulated our strategic intent in 2011 following detailed discussions about restructuring in 2010. It is time once again to consider our strategic intent and, to that end, we are initiating a series of conversations that ultimately will engage both internal and external stakeholders. We intend these conversations to ensure we are attentive and responsive to environmental, economic, and social dynamics as well as frontiers of science and advances in pedagogy, and that we allocate our College’s resources for maximum benefit.

## *What are we engaged in?*

Beginning now, in late summer 2013, and continuing through the fall, we have asked small groups comprising several faculty members in the College to convene each of 12 topically focused conversations. The topics are:

- Student success
- Graduate education
- Areas of emphasis for research
- Resources and business plan
- Communications
- Marketing
- Outreach and engagement
- Equity, diversity, and inclusion
- Infrastructure and facilities
- International
- Role in STEM education
- Faculty success

Rather than undertake a traditional strategic planning process that is necessarily resource-consuming, we have embraced a design that we intend to be broadly inclusive but not intrusive of people’s time. In essence, it assumes:

- Focused, topically oriented conversations can identify important trends and developments to which the College should be attentive;
- Participants in these conversations, because of their expertise, experience, and engagement, bring with them the knowledge needed for the conversations to be productive;
- Ideas and observations from these conversations, captured at the time and subsequently shared more widely, can inform additional conversations with other, different participants;
- The College's annual Administrators' Workshop will consider the products of these conversations when it convenes in November 2013;
- The products of this series of conversations will inform the development of the College's next *Statement of Strategic Intent*;
- Especially productive conversations will be continued into 2014, inviting others to take part.

## Hosting a conversation

This section deals with planning and conducting the event. Please see the "Tools and References" section later for details of invitations, facilities, and catering *that will be handled for you*.

### *Pre-work*

Consider providing participants with a short (no more than front and back of one sheet) white paper relating to your topic area. Delivered to participants *about a week ahead* of your event, the white paper might address both *background information about the topic area*, and at least a general description of the *process*. For example, you may choose to provide *background information* that offers the reader a sense of focus and character of conversation you intend to have, and emphasizing "big-picture" ideas, concepts, and observations, and avoiding getting into great detail. **Be clear about the questions you expect to pose during the conversation.** With respect to *process*, you may choose to describe what you want the conversation to produce, emphasizing the short (~90- to 120-minute) time frame, noting that participants will be asked to introduce new ideas to the conversation rather than repeating or "seconding" what's already been said, and that everyone who wishes to speak will have an opportunity to do so.

### *Planning the event*

One of the most difficult aspects of planning an event like this is answering the question, "What conversations do we need to have?" Being clear about this in advance puts success within reach. For example, if you're leading an event that's focused on science, you may want to introduce a conversation that identifies the top half-dozen trends or developments in science that the College cannot afford to ignore or that appear to leverage certain competitive advantages we may have in that area of science. Or, if your focus is on teaching and learning, you may choose to introduce a conversation that identifies at least five developments in pedagogy that offer prospects for how the College

advances learning. **In a 90- to 120-minute period, you will likely want to address no more than two or three questions or conversations.**

Once you're reasonably clear about what you want to produce, consider *process* (how you're going to get there). Conversations about any of these strategic considerations could go on at length but you will be working within a relatively short time frame of about 90 minutes to no more than a couple of hours. Because you will want to capture the good ideas, observations, and suggestions that each participant is likely to bring, it will be important to ensure that everyone who wishes to speak has an opportunity to do so. That suggests a process where, for each question or conversation, the first process step after your introductory set-up (see below) will be to invite each participant to share her or his thinking on the topic in no more than, say, 60 or 90 seconds. Let participants know you're interested in generating possibilities without feeling obliged to pursue everything that's suggested. Also, be open to suggestions about what we do now that might be ended; ending something is often a prerequisite to beginning something new! After everyone has had a chance to speak, you might choose to open the session to all, but with the admonition that remarks should be kept brief (no more than two minutes) and focused on what you're intending to produce. Obviously, this means you will want to designate someone to manage the conversation, tracking time, reminding participants of what you want to produce, and ensuring the broadest possible participation.

## At the event...

You and others hosting the event will want to arrive early (equipped with handouts, if appropriate), ensure the room is suitably arranged, catering is available as planned, and any technology tools are working satisfactorily. As participants arrive, welcome them at the door, greet them by name if you know them, or introduce yourself if you don't. Start on time (and end on time). Consider a bell or similar device to get people's attention.

Once the event has begun, introduce yourself, remind people what prompts the event and what you're there to do. Briefly describe (or remind) participants of the two or three topics or questions you intend to address.

### ***Set-up, process, and closure***

For success with *each* of your conversations, there are three essential elements: *set-up*, *process*, and *closure*.

**Set-up** (what you say at the outset) may include:

- The context for this conversation.
- What you want the conversation to produce.
- Reference to the content of the "pre-work" reading and the questions posed therein.
- What kind of contributions you seek from the participants.
- Acknowledge any concerns the participants may have (such as "We don't have enough time!").
- What process steps you'll follow.
- How much time you'll allocate for this.

- How key points from the conversation will be captured.

**Process** (how the conversation manager will guide the conversation) might include, for example:

- Around the room to each participant in turn, or by random self-selection each person is invited—but not required—to speak (but each person gets to speak only once in this first round): *What one “big idea” is at the forefront of your thinking when you consider this question?*
- Once everyone has had a chance to contribute, open the conversation, perhaps with a question along these lines: *Considering not only your own thinking but also what you have just heard, what strikes you as especially deserving of attention as the College considers its strategies for the future?*
- *Having heard the conversation thus far, what prospects do you see for collaboration across units in the College or more broadly across the University or with other organizations or agencies?*

**[Note: Tailor the process for the particular topics your group intends to handle.]**

**Closure** (what you do at the end of *each* conversation) may include:

- Revisiting of the key points made during the conversation.
- Checking in to make sure everyone’s “big idea” has been captured.
- Inquire: *Is there anything else that needs to be said or asked?*
- Acknowledge anyone whose contributions should be recognized.
- Reminder of what happens next.

### ***Capturing the conversation***

It is essential to capture the key ideas that emerge from the conversation you are convening. Exactly how you do that is up to you, but it’s likely a good idea to commission someone to listen for the major ideas that emerge and to make note of each of them on a whiteboard or in some other manner that makes them visible. (Avoid attempting to capture *everything* that’s said!)

## **What we’re seeking**

Conversation leaders should summarize the key points that emerge from their conversations. It is difficult to come up with a single template that will work for all the summaries, but here are some guidelines to help.

- Provide the key points from your conversation. Focus on the what and why, recognizing that the how will come later.
- Keep the summaries brief (recalling that we will have 12 summaries to digest prior to the Administrators’ Workshop in November)—1 to 2 pages.
- Organizing your summary around the questions you asked would provide context for other readers.
- It may be helpful to include some of your own observations to help provide context for the summary and for how the conversation unfolded.
- **Please provide an electronic copy of your summary to Liz Webb within a week of the event you hosted.**

## Tools and references

### *Logistical arrangements (facility and catering)*

Because we want to make it as easy as possible for our off-campus colleagues to participate, the College already has reserved a videoconference-capable room (Agriculture and Life Sciences building, room 3005) to be available from 11:00 a.m. to 2 p.m. every day between Aug. 26 and Sept. 30. Similarly, preliminary catering arrangements are in place to provide lunch for participants at that time on any of those dates. **Therefore, we ask that you work with Liz Webb, by phone (737-5656), to schedule your group's conversation.** She and Loretta Austin will ensure availability of the room and catered lunches for those who attend.

### *Invitations (specific and general), and pre-work*

#### **Initiating the invitation process**

Please identify specific invitees you believe can make significant and substantial contributions. Once you have done so, then provide to Liz Webb ([Elizabeth.c.webb@oregonstate.edu](mailto:Elizabeth.c.webb@oregonstate.edu)) a list of their names (and affiliation, if they are not part of our College). Liz and Loretta Austin will then prepare and send personalized invitations from Dean Dan Arp. (This limits your workload and helps us track all invitations, thereby avoiding reaching too often to the same individuals.) There is no established number of invitations specifically to individuals, but something around 15 (assuming about a 50 percent acceptance) should ensure that your conversation has a good core of participants. While it is expected that most invitations will go to individuals in the College, it is appropriate to invite a few key individuals from outside the College.

#### **Extending open Invitations**

General invitations will also be extended College-wide offering participation in any of the 12 conversations. A reservation process will be used on a first-come-first-served basis so that conversation groups do not get too large. A message will go out to the College describing this strategic intent process and inviting people to register for those conversations for which dates and times have been set. Additional reminders will be sent as the process unfolds and additional conversation times are set.

#### **Sharing pre-work**

If you have pre-work for your invitees, you may send it to them directly after we receive RSVPs. Please also share a copy with Liz so she may post it on the web.

### *Guides for conversations*

If you would find it helpful, three four-page guides to successful group conversations are available, courtesy of Paul Axtell of Contextual Program Designs. They are:

- *Designing Group Conversations*
- *Managing Group Conversations*
- *Participating in Group Conversations*

Any or all of these publications (as PDF files) are available on request from Liz Webb. Please note, these are not to be distributed outside of Oregon State University.

### ***Mission of the College***

The College of Agricultural Sciences at Oregon State University is a principal source of knowledge relating to agricultural and food systems, environmental quality, natural resources, life sciences, and rural economies and communities. The College provides enabling education, fosters leadership, and promotes cultural awareness in all of its graduates. Its research programs create knowledge and innovations to solve problems, promote jobs, and support the economy. It is a source of information and expertise in integrating and applying knowledge with benefits that are felt in domestic and international settings.

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