

## PRESENTATION ADDENDUM

### Slide 4 – Strategic Plan Development *Strategic Plan #1 – 2014-2018 | Timeline Overview*

<b>Projected Timeframe</b>	<b>Action</b>	<b>Notes</b>
October 2014	Being creating strategic plan	Discussion and development over four week period, approximate 1 hour meeting each time
December 2, 2014	Finalize strategic plan	Include plans for where we hope to be at the end of year 1, year 2, year 3, & year 4
January 2015	Create action plans and set timelines	Completed during RA training
April 2015	Assess progress and determine what was left undone and prepare for next year	
August 2015	Create action plan for year 2, including any items left undone	Completed during RA training, RAs give presentations on their ideas and direction for the year
November 2015	Assess progress and what is not going well and what is going well	Adjustments are made to initial plans based on testing of initiatives
January 2016	Create new action plans to complete goals and progress for year 2	RAs give presentations on their progress, assessment results, and direction for the semester
April 2016	Assess progress of year 1 and year 2 and determine if we are on track for year 3	Completed during RA training
<b>August-April process was repeated each year through April 2018</b>		
April 2018	Review year 4 initiatives  Complete overall review of strategic plan progress and success and  Determine what goals and overall objectives should be continued into the next strategic plan for further development	

## Organic Creativity through Strategic Planning

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Loyd Commons, Southern Methodist University

### Method for First Strategic Plan Development

To determine the goals and yearly objectives for the first strategic plan, a list of questions were utilized to help guide the leadership team. For each meeting, the team had complete different sections of their guide and be ready to share and discuss their thoughts. Below is an example.

#### STEP 1: ASSESS WHERE YOU ARE (please be descript!)

What questions/uncertainties do you have about where we (Loyd) are heading with the new RC Model?	
What do you feel has gone well thus far?	
What do you feel is not working thus far?	
What is holding us back right now from moving forward with the RC Model? (as a Loyd team, as a department, as a university)	

#### STEP 2: DEFINE THE EXPERIENCE

What do you think (or have you heard) current residents say about living in Loyd thus far?	
Someone asks you to describe the residential commons model at SMU and the experience it should provide to residents. What do you say?	
What is the Loyd "Elevator Pitch"?  You have 30 seconds or less to describe in 1-2 sentences the Loyd experience. It has to grab the attention of a current or potential resident. It has to leave them wanting to know more – as their response should be, "please tell me more..."	
What is the Loyd Elevator Pitch in your own words?	
Our motto is "Inspiring Community through Service". Have we done this yet? If so, how?	
What do you want to be the benefits of living in Loyd? (things residents of other commons would not obtain)	

#### STEP 3: GOAL PLANNING (this is going to be harder and where you need to think outside the box)

At the end of year 4, what should we have accomplished? (THIS NEEDS TO BE DETAILED) What will tell us we have been successful?	
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<p>PONDER: The first class of Loyd residents will be graduating this year. What would you want them to say at the end of their four undergraduate years?</p> <p>REMEMBER the motto and values</p>	
<p>At the end of year 3, what should we have accomplished? (THIS NEEDS TO BE DETAILED) What will tell us we have been successful?</p> <p>To set us up for year 4 success, we should have accomplished...</p> <p>REMEMBER the motto and values</p>	
<p>At the end of year 2, what should we have accomplished? (THIS NEEDS TO BE DETAILED) What will tell us we have been successful?</p> <p>To set us up for year 3 success, we should have accomplished...</p> <p>REMEMBER the motto and values</p>	
<p>At the end of year 1, what should we have accomplished? (THIS NEEDS TO BE DETAILED) What will tell us we have been successful?</p> <p>To set us up for year 2 success, we should have accomplished...</p> <p>REMEMBER the motto and values</p>	

### STEP 4: ACTION STEPS (what important things need to happen to help us accomplish those goals?)

<p>Action Steps for year 1</p> <p>Remember:</p> <ul style="list-style-type: none"> <li>• Motto &amp; values</li> <li>• Your elevator pitch</li> </ul>	
<p>Action Steps for year 2</p> <p>Remember:</p> <ul style="list-style-type: none"> <li>• Motto &amp; values</li> <li>• Your elevator pitch</li> </ul>	
<p>Action Steps for year 3</p> <p>Remember:</p> <ul style="list-style-type: none"> <li>• Motto &amp; values</li> <li>• Your elevator pitch</li> </ul>	
<p>Action Steps for year 3</p> <p>Remember:</p> <ul style="list-style-type: none"> <li>• Motto &amp; values</li> </ul> <p>Your elevator pitch</p>	

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### ***Strategic Plan #2 – 2018-2022 | Timeline Overview***

<b>Projected Timeframe</b>	<b>Action</b>
April 2018	Outgoing and Incoming Leadership Team complete SWOT analysis, Final collection of input, themes and objectives determined
August of each year through 2021	Leadership team begins working on ideas and action plans for year 1 objectives, gives presentations on their ideas and direction for the year
October of each year through 2021	Leadership team begins to assess progress
December of each year through 2021	Leadership team finalizes plans from Fall and prepares for Spring semester
January of each year through 2022	Leadership team presents to team their progress and collects feedback from the team
March of each year through 2022	Leadership team assesses progress of their initiatives
May of each year through 2022	Leadership team assesses implementation and impact of initiatives and determines if new idea will be engrained into the community as part of culture and who responsibility will be transitioned to for the future
Spring 2022	Leadership team finalizes plans for third strategic plan

#### **Method for Second Strategic Plan Development**

To determine the themes for the second strategic plan, we utilized several different methods of collecting information.

- Move-out survey information – Each year, each resident completes an exit survey during the room checkout process. We get nearly 100% response rate. The survey helps the leadership team collect feedback on what stands out to residents as important.
- Individual qualitative assessment – As part of the first strategic plan, collecting feedback from former and current residents was a crucial step in the development of initiatives and ideas. This feedback also served as a way to help collect qualitative anecdotes about the experience of living in Loyd Commons and help us see what was working and where we can still improve.
- Focus Group – As a final step of the development of the second strategic plan, incoming and outgoing leaders were used as a focus group. The leaders represented four classes of Loydians and included a diverse array of experiences in the community. The group completed a SWOT analysis and discussed in detail what they believe are the “aspects of a perfect Loyd Commons.”

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### Slide 5 – Goals for Strategic Plans

#### *Strategic Plan #1 | Goals*

Goal	Aspiration/Vision
Motto and values represented in the community	Cohesive community that believes the motto and represents the values of Loyd
	Students would be excited about community service that students would vote on what service to be done each semester.
Commons identity known by incoming students	Students entering Loyd for the first time should understand the traditions and atmosphere of the classes set before them. Before students are on campus and before they are assigned housing, they know what personalities of the commons.
	Whatever we are in year four, should be what it will be “forever”
Graduates understand the values and want to return as alumni	First graduating class of Loyd should feel as if they have modeled the values in their four years. They should want to come back after graduation to experience the traditions and atmosphere for years to come. Former residents should want to come back because they feel a sense of gratitude toward Loyd – to banquets, events, etc.
	All former and current students would know the values and work to incorporate them into their lives. Still feel a sense of community and a bond to Loyd.
	Those who are graduating should be able to pinpoint how Loyd impacted their college experience.
Fully functional and effective council	Absolute best Commons Council – experience president, cabinet, competitive elections, recognized original well done programs
Established traditions	Full set of annual events that we do not need to necessarily advertise because residents know to expect them. Everybody will be there (majority).

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### ***Strategic Plan #2 | Goals***

#### **Community**

Sense of community was the most reoccurring theme for Loyd as strength as well as an area for growth. The feedback showed consistent common perceptions were that Loyd embodied a connected and important community feeling. However, the other side of that perception is that residents also observed the gaps and overall wanted to grow the sense of community in a variety of areas.

##### Key Components

- Interactions and engagement – expand opportunities for formal and informal interaction through such things as floor activities, small group activities, study groups, and social groups
- Involvement – increased involvement and desire to give back to their community through being involved and taking on responsibility
- Resident Input – focus on decision making based on feedback from Loydians collected through both formal and informal means
- Pride – increase pride as Loydians and connection to and defining the Loyd experience, developing ways for Loydians to find a connection to the Loyd community
- Accountability – Loydians holding each other accountable for their actions, taking responsibility for the care of each other, themselves, and the community as a whole

#### **Leadership**

Strengthening the scope and reach of leadership experiences in the community was an important theme as students made it clear that they viewed their leadership opportunities in Loyd as a strength, but also as an opportunity to further expand.

##### Key Components

- Structure of leadership – evaluating impact of structure and ways to increase effectiveness of position as well as experience of individuals serving in positions of leadership
- Resources – availability of resources offered by leadership, creation and development of resources. Resources could range from academics to personal needs
- Mentorship – development of formal and informal means of experienced Loydians mentoring younger Loydians
- Communication – strengthening ways for all forms of communication to be effective for any Loydian regardless of position in the community

#### **Physical Environment**

Care for the physical environment of Loyd arose as a prominent theme. This included aspects ranging from overall cleanliness and upkeep of the building to comfortable and aesthetic spaces. As we move forward with initiatives for this theme over the next four years, it will always be important to think creatively within the confines of university rules and regulations that are out of the locus of control for those in the community.

##### Key Components

- Facility upkeep – building maintenance, repairing of community damage
- Cleanliness – housekeeping services including bathrooms and shared spaces

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- Community aesthetic – design of shared spaces including such things as painting, decorations, furniture
- Comfortable spaces – shared community spaces residents perceive as welcoming and comfortable
- Respect for physical environment – residents feeling ownership of shared spaces, no tolerance for community damage, resident accountability

## **Social Justice**

Social Justice as a theme arose in several ways. Students who brought up the different components in this theme may not have initially understood that all of them connect through the lens of social justice. Thus, initiatives developed in this theme will also need to incorporate an understanding of social justice as well.

### Key Components

- Social Justice – understanding the scope of social justice and everyone’s role for living a socially just existence
- Sustainability – increased awareness of opportunities to live sustainably and reduce waste in a variety of forms
- Community Service – connecting service opportunities to make them meaningful and impactful for individual experiences
- Value and appreciation of diversity – opportunity to learn about the variety of different identities and experiences that art part of the community, sharing personal stories without judgement or persecution
- Understanding of self as part of a global community – moving students forward in their understanding of their personal identity and how they fit into the world-at-large

**Slide 6 – Creating the Environment: Initiative Development**  
*Brainstorming Sheet Example*

<b>STRATEGIC PLANNING IDEA BRAINSTORMING</b>	
<b>COMMUNITY</b>	
<i>Idea</i>	<i>Areas to consider? (i.e. impact, current limitations, who would be take on initiative if successful)</i>
<b>LEADERSHIP</b>	
<i>Idea</i>	<i>Areas to consider? (i.e. impact, current limitations, who would be take on initiative if successful)</i>
<b>PHYSICAL ENVIRONMENT</b>	
<i>Idea</i>	<i>Areas to consider? (i.e. impact, current limitations, who would be take on initiative if successful)</i>
<b>SOCIAL JUSTICE</b>	
<i>Idea</i>	<i>Areas to consider? (i.e. impact, current limitations, who would be take on initiative if successful)</i>

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**Tracking Example**

<p><b>STRATEGIC PLANNING PROJECT DEVELOPMENT TRACKING</b></p> <p>Year-at-a-Glance Tracking:</p> <ul style="list-style-type: none"> <li>• August 2018 – Leadership team begins working on ideas and action plans for year 1 objectives</li> <li>• October 2018 – Leadership team begins to assess progress</li> <li>• December 2018 – Leadership team finalizes plans from Fall and prepares for Spring semester</li> <li>• January 2019 – Leadership team presents to team their progress and collects feedback from the team</li> <li>• March 2019 – Leadership team assesses progress of their initiatives</li> <li>• May 2019 – Leadership team assesses implementation and impact of initiatives and determines if new idea will be engrained into the community as part of culture and who responsibility will be transitioned to for the futures</li> </ul>		
<p><b>THEME: Community</b> Sense of community was the most reoccurring theme for Loyd as strength as well as an area for growth. The feedback showed consistent common perceptions were that Loyd embodied a connected and important community feeling. However, the other side of that perception is that residents also observed the gaps and overall wanted to grow the sense of community in a variety of areas.</p>	<p><b>Theme Key Components</b></p> <ul style="list-style-type: none"> <li>• Interactions and engagement – expand opportunities for formal and informal interaction through such things as floor activities, small group activities, study groups, and social groups</li> <li>• Involvement – increased involvement and desire to give back to their community through being involved and taking on responsibility</li> <li>• Resident Input – focus on decision making based on feedback from Loydians collected through both formal and informal means</li> <li>• Open</li> <li>• Pride – increase pride as Loydians and connection to and defining the Loyd experience, developing ways for Loydians to find a connection to the Loyd community</li> <li>• Accountability – Loydians holding each other accountable for their actions, taking responsibility for the care of each other, themselves, and the community as a whole</li> </ul>	
<p>Initial Concept Description:</p>	<p>Description for How the Concept Connects to Key Components of the Theme:</p>	<p>Initial Development Timeline:</p>
<p>Fall 2018 Progress Tracking for One on One Meeting Notes</p> <ul style="list-style-type: none"> <li>•</li> </ul>	<p>Spring 2019 Progress Tracking for One on One Meeting Notes</p> <ul style="list-style-type: none"> <li>•</li> </ul>	