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# Unit Strategic Plan 2022-27

Virginia Tech Center for Economic and Community Engagement

September 2023



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# Introduction

In the spring of 2021, the Virginia Tech Office of Economic Development (OED) became the Center for Economic and Community Engagement (CECE). Becoming a University Center means "enhancing the achievement of [the organizational entity's] instructional, research, and outreach mission" (Policy 13005). As a center, we charged ourselves with:

- Increasing the university's impact
- Elevating the Ut Prosim difference
- Maintaining a transdisciplinary focus
- Addressing the urban-rural divide

For the faculty and staff that make up this university center, this change has created an opportunity to think and reflect holistically on the work we do and what we collectively propose to do in the future. For this grassroots effort, we established a set of goals that guided this planning process:

- Develop a shared mission, vision, values, goals, and strategies
- Build communication and collaboration amongst the team by creating shared understanding of work and identifying how everyone's work fits into the new center
- Create a shared approach to how we communicate CECE to external audiences
- Improve operations and ways we do the work together

The following describes the process we used to achieve these goals and develop a plan for how we would move forward as a center. It is important to note that this written plan is a snapshot in time. The plan itself will and should evolve as CECE faculty and staff implement and learn from the strategies and activities outlined in this document.



# Approach

The process of becoming a university center began in 2017, when OED staff and faculty first discussed the opportunity during a staff retreat in Chincoteague, VA. Discussions on how our office operated, partnered, pursued work, prioritized projects, and talked about our activities had occurred well before that. However, as we took the steps towards becoming a university center, the need to engage in a strategic planning process that brought our thoughts and visions together became ever more pressing.

On top of everyday work and a COVID Pandemic, CECE personnel moved forward on creating a shared plan for development. The following is a timeline and brief description of that process.

- **Fall 2019:** Faculty and staff filled out a questionnaire that highlighted steps needed during this process and possible trajectories for the center. Goals for the strategic planning process were developed from this questionnaire.
- **Spring 2020:** CECE personnel explored over two dozen comparable centers. These were university offices and private consultants that pursued similar partnership activities and conducted similar applied research to CECE. CECE personnel examined the work done by these comparable centers, their visions and mission statements, their clients and partners, and their funding mechanisms.
- **Summer 2021:** Drawing from previous discussions about goals for the new center and comparable centers, CECE personnel individually responded to a questionnaire focused on developing the vision, mission, and value statements of the center. Over several sessions, the group discussed key topics and values inspiring these statements. Finally, the group engaged in some wordsmithing.
- **Fall 2022:** CECE faculty, staff and graduate students split into four goal groups: 1) project portfolio, 2) partnerships, 3) communications and outreach, and 4) internal structure and operations. Each group was charged with creating a goal, prioritizing strategies, generating activities and brainstorming ways of measuring goal success. Each goal group began with examining past performance of OED and exploring promising opportunities from comparable centers.
- **Spring and Summer 2022:** The goal groups came together for a staff retreat to present their work to-date and engaged feedback from colleagues. Each group facilitated their own session. Several groups also began to implement some of the work and activities done by their goal groups. For instance, the communication and outreach goal group used one of CECE's weekly team meetings to mutually brainstorm blog and newsletter topics, mobilizing all personnel in the effort to create outreach material. Each group finalized their group's goals, strategies, activities, and success measures.
- **Fall 2022:** CECE personnel wrote a draft plan using the work done throughout this planning process. For the CECE staff retreat, they reviewed work to-date, formed implementation groups, and assessed next steps for implementing the plan in the future. Since then, this plan has served as a foundation for CECE's activities and strategies for achieving the vision and mission of the center. CECE treats this as a living document that we will revise regularly.

# Vision, Mission, and Values

#### Vision + Mission

We advance shared economic and community prosperity through the delivery of applied research, engagement partnerships, and targeted university expertise.

#### Values

The following are the five values that CECE personnel embrace and strive for in their work. The sub-bullets are ways in which we attempt to illustrate those values. CECE faculty and staff are committed to:

- **Connecting communities**, building networks across the Commonwealth and the university, knowing that it takes many talents and backgrounds to address shared issues
  - ° We examine economic and community issues at different geographic and organizational scales to identify gaps and synergies across communities and partners
  - ° We identify and connect partners with different knowledge-bases
  - <sup>°</sup> We supplement our own expertise and knowledge with those of our partners and leverage those partnerships to generate more connections and opportunities
- **Collaboration and teamwork**, the best approach to problem solving and forging a partner's path toward their own prosperity.
  - <sup>°</sup> We recognize our community partners and stakeholders as peers who have the knowledge and expertise that will help bring the project to fruition
  - ° With our partners, we co-create approaches and strategies to mutually defined problems
  - ° We conduct interviews, focus groups, facilitated sessions, work sessions and surveys to share and vet data with all stakeholders
  - ° Internal to CECE, we value the voice of every faculty, staff, and graduate student by 1) structuring weekly meetings around open dialogue and discussion on the day-to-day workings of the center, 2) highlighting individual and team contributions and successes, 3) supporting efforts for professional growth and team-building, and 4) ensuring internal operations are transparent and open to input and critique
- **Continuous learning and evaluation** with all peers and partners to achieve innovative, data-informed and implementable strategies.
  - ° We treat each project as a new opportunity to learn, understanding each partner and community is unique
  - <sup>°</sup> We draw on the input and expertise of faculty and practitioners from Virginia Tech and across the United States to offer new and innovative ideas to our partners
  - <sup>°</sup> With our partners and others, we co-create knowledge and understanding of existing needs and solutions
  - We apply that knowledge to evaluate project successes and challenges, helping improve current projects and ensure accountability for the resources we use
- **Community-tailored research**, with the understanding that problems and opportunities are best addressed when plans, studies, and analyses reflect the interests and situations of those most affected.
  - $^\circ\,$  We diligently listen and align our work with the goals and assets of partners

- ° We review the needs of our partners and devise appropriate approaches to addressing those needs
- <sup>°</sup> We draw on an assortment of knowledge, skills and educational backgrounds to inform and design our research and partnerships. To ensure that communities are receiving the best possible support, we also turn to expertise and talent from the university
- **Promoting equitable development**, knowing the most vibrant and resilient economies are also the most geographically, socially and economically inclusive
  - <sup>°</sup> We work with our partners to ensure that our projects reach the greatest and most diverse population of stakeholders in the community
  - <sup>°</sup> When entering a room, we ask who's missing and dig deeper to find other community members with interests at stake. Who else should be at the table?
  - ° We engage and learn from historically marginalized communities to take care that all voices and needs are represented in our work
  - <sup>°</sup> We deliberately and actively reach out to peers and communities from historically marginalized populations to develop projects and programs
  - <sup>°</sup> We conduct due diligence reviews of our projects to understand better how different parts of the community in which we work may be impacted (Aspirational)



Photo by Julia Kell/Virginia Tech

#### GOAL 1: Become a preferred, go-to, or benchmark center for advancing economic and community prosperity through a highvalue, high-potential, and high-quality portfolio of work.

In the past, CECE has characterized itself with the following differentiators or competitive advantages: 1) expertise at a reasonable cost thanks to our land grant and EDA University Center status; 2) our dedications to "boots on the ground" or willingness to spend time in communities and learn; and 3) the Virginia Tech brand name and connectivity to university resources. It is our goal to maintain these competitive advantages, while building advantages centered on expertise, partnerships, and high-quality work.

We can divide CECE's current portfolio of work into four core areas:

1. <u>**Projects**</u> include applied research and technical assistance studies and services. Topics of applied economic and community research projects vary widely but often fall into four LIFT categories:

- Leadership and capacity building, strategic development, and planning
- Impact analysis, assessment, and evaluation
- Feasibility and market analysis
- Technology, entrepreneurship, and innovation-focused economic consulting and support

2. <u>Partnerships</u> involve engaged connections, convening activities, and collaborative relationships with regional and local development entities (including municipalities and nonprofits), state agencies and entities, and higher education partners, and private companies. Goal 2 explores this portfolio area more in-depth.

3. <u>**Programs**</u> are focused center initiatives that faculty are currently developing and implementing. Current programs include GO Virginia and Vibrant Virginia.

4. <u>Public Scholarship</u> entails faculty and staff harnessing and sharing university expertise and thought leadership with partners, communities, and peers.

Our center faces workload, financial, and aspirational challenges. As we grow, our workload increases as does our financial need to support a larger group of faculty and staff with growing expertise and salaries. Simultaneously, we wish for our center to grow in reputation as a place for high-quality, respected research and expertise. As such, we need to prioritize higher-quality and higher-value (or purpose-aligned) work.

So, what does CECE consider to be "higher value" work? Value in the sense we use it here is not necessarily equated with monetary value. Rather, a high value project could conceivably be one that has little or no direct revenue generation, if it aligns closely with our mission, with the interests of one or more of our individual faculty, and offers an opportunity to generate insight, learning, or social benefit. In general, high value work is that work which holds promise to advance knowledge, model or test new approaches, generate impact for CECE (funding and visibility), or add significant future value in terms of regional job creation or well-being AND that is aligned with CECE core expertise & interests.

Specifically to understanding the potential value of a project, we should ask:

- Does the project help to advance CECE goals and values?
- Is this project of strategic or political merit?
- Does the project align with and build upon the technical and subject matter expertise of the faculty?
- Can this project serve as an opportunity transition technical and subject matter expertise to other faculty and staff?
- Does the project build on work already done in a given geography or offer the opportunity to build partnerships in a new geography?
- How does this project help CECE to build and create new partnerships?
- How feasible is the project budget in terms of money brought in to support faculty and staff salaries versus the work required?Does this project potentially offer new long-term funding streams for CECE?

STRATEGIES	ACTIVITIES	MEASURES OF SUCCESS	
Reduce time and effort spent on lower value project work	Develop a protocol for faculty to share possible projects with the project team.	The percentage of active projects under \$50,000 will decrease from the year prior, representing no more than 50% of active projects. Conduct up to 3 pro bono projects annually and articulate their merit and alignment with CECE's mission.	
	Solicit and accept 3 "pro bono" projects each year.		
	Monitor and keep the number of active projects that are under \$50,000 to less than half of the project portfolio.		
Increase the amount of higher value project work we want to continue	Pair a GA and a CECE faculty member to work together on identifying, developing, and submitting one OSP grant project during that GA's tenure at CECE.	Increase the number of higher value projects over \$50,000 from the year prior. Target: 50%. Ensure each faculty and staff member annually engages in one or more learning experiences that hone their skillsets (in or out of office) (AUO). Of those learning experiences, how many were applied or used to support a project? (EO).	
	Establish a more structured coaching and mentoring process for less tenured Specialists/CECE project leaders.		
	Establish a monthly time (preferably FTF) for Specialists/CECE project leaders to meet informally (without a program) to discuss projects ins and outs, share lessons and challenges, etc.		
Generate new types of higher value work	Consider adding or supplementing expertise on our team or building sustained partnerships with experts in areas of high interest.	Number of faculty members that have learned a new skill. Number of faculty members who have honed a skill. Increase the number of projects with contracted partners outside CECE. Increase geographic breadth of CECE. Map project geography and list number of projects that are in a geography where CECE has not worked for past three years.	
	Consider co-partnerships with development and non-profit entities to develop short-term shared positions or joint activities to pilot or implement programs that advance community and economic prosperity.		
	Each CECE faculty member picks one locality (city or county) OR one organization per quarter to visit for a "listening tour". Spend 1- 2 days there, meet with officials, non-profits, ED, beneficiaries and partners. Learn about 1- 2 current issues or activities in depth.		

#### Goal 2: Develop partnering capabilities that enable CECE to help partners to think strategically and find pathways to economic prosperity.

CECE leadership views partnerships as important, both for positions/roles based in regions of Virginia and for positions that focus on project development and execution. Relationship-building has historically been seen as particularly important for roles that focus on directing CECE, building alliances for the university, and developing new programs at the Commonwealth Campus Centers. However, partnerships can contribute substantially to broadening and expanding our project portfolio in ways that include alerting CECE to new opportunities, teaming to add capabilities, and increasing the success of proposals we chose to submit. Furthermore, as CECE has more programs such as GO Virginia and the Internship Collaborative, partnerships are key to success.

We discovered the need to have a better understanding across our team of the value of partnerships and how to develop and nurture partnerships that have positive impact. Our data/information resources on partnerships differ according to roles in the group and CECE needs to have more complete information about partnerships both internal to Virginia Tech and external to the university. This information will be particularly useful for new CECE team members.

#### Value Partnerships Bring to CECE and Virginia Tech

The framework for partnerships considers the value that partnerships bring to CECE in achieving its mission at Virginia Tech. Why should CECE partner? The following section delineates some of the benefits that partnerships bring to our Center.



Bring Complementary Knowledge



Serve as Advisors



Grow Economy in Virginia



Fund Projects/Initiatives



**Collaborate on Proposals** 

#### **Characterizing Partners**

**CECE Client Partner** – an organization that has sponsored CECE work in the past and one with which we want to maintain ties.

**University Partner** – organizations that CECE maintains partnerships with on behalf of Virginia Tech. Examples include Aerospace Corp, MITRE, and Urban Alliance.

Advisor/Collaborator Partner – this category encompasses many different kinds of relationships, from members of our advisory board to collaborators on proposals.

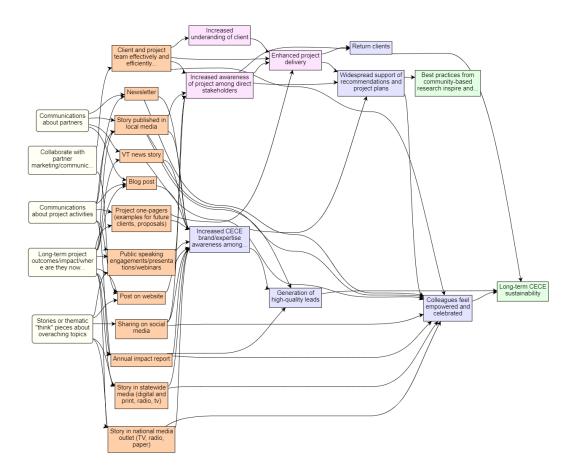
STRATEGIES	ACTIVITIES	MEASURES OF SUCCESS
Enhance capacity of CECE faculty to partner	Develop and conduct a training session (s) on how to assess potential partners, conduct productive exploratory conversations with partners, and manage the relationship.	Identify, characterize and cultivate specific partnerships of importance to each CECE
	Have CECE faculty identify internal and external partnerships they want to initiate or enhance during a given fiscal year.	faculty member. Establish a baseline of 3-5 substantive partnerships
	Coaching for CECE team members on developing and nurturing partnerships.	(internal and external) for each member to cultivate. 80% of CECE faculty participate in designated training/professional development sessions on partnerships.
Better knowledge	At monthly meetings, lift up key internal and external partners that are important to CECE. What's the nature of these internal or external partners? How do they help CECE do its work?	Track project wins and losses to determine role partners play in increasing successful proposals. Reach a decision about whether to implement a
management and sharing about partners	Establish standard definitions of partnership categories/ classifications so that information is captured consistently. Evaluate CRM (or other means) system's ability to help	
	achieve better knowledge management.	CRM system for CECE.
Align work with other goal groups	Ensuring that partnership goals are consistent with growth areas for projects and programs. Use Project / Partner team meetings to focus on particular partner areas – Foundations, for example, that would grow the project portfolio.	
	Synchronize partner classification with project team.	
	Interview comparable centers to learn about their approach to partnerships – add an external benchmarking perspective	
	Consider how to best communicate partnerships on Website and leverage partner communications channels	

#### GOAL 3: Increase the visibility of CECE through increased brand awareness, generation of high-quality leads, shared best practices from community-based research, increase in customer value, and empowerment and celebration of our colleagues.

Throughout its history, CECE's outreach and marketing has focused largely on blog posts, VT News articles, social media posts, website maintenance, and regular email marketing to promote center work. In recent years, those efforts have expanded to the Vibrant Virginia book and annual impact reports. Promotional videos are also a new medium for CECE, which require more exploration.

#### **Outreach Pathway Model**

Through an analysis of past marketing strategies as well as discussions with group and CECE members, the Goal 3 group developed a flow chart illustrating how prioritized strategies (in white) contribute to marketing and outreach activities (in orange) and result in different short-, medium-, and long-term outcomes (in pink, purple, and green). The group further developed these strategies in the write-up below.

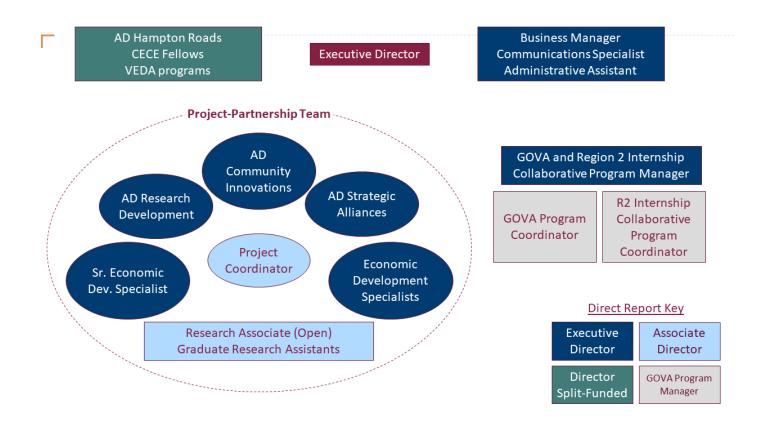


STRATEGIES	ACTIVITIES	MEASURES OF SUCCESS
Coordinate communication strategies with partners through a "Communications & Expectations Questionnaire"	<ul> <li>Posts on social media</li> <li>Stories in national, statewide, and local media (TV, radio, paper, digital)</li> <li>VT News stories</li> <li>Posts on website</li> <li>Annual impact report</li> <li>Blog posts</li> <li>Newsletters</li> <li>Project one-pagers (proposals or examples for future clients)</li> <li>Published scholarship (articles or books)</li> <li>White papers</li> </ul>	Each client or partner has a communications intake form on file. 50% of partners re-post/re-share some type of communications about their engagement with CECE. Assess the perceived value to client via intake form and post-project follow-up about how our work is shared. All internal (VT) and external contacts are tracked in a single communications database and receives regular CECE communications (they can opt out). Enhanced communication with clients leads to widespread support for recommendations and project plans. More repeat client-partners.
Share communication and marketing responsibilities across the CECE team beginning with monthly pitch sessions		10 pitches per month; 50% of pitch ideas become blog posts. 90% of projects closed or opened in FY22- 23 have some form of CECE communication.
Publicize project activities, long-term outcomes and impacts		Equal breadth of stories in local/regional news, VT news, blog, social media, white paper, presentation. More readers, high-quality leads and client
Develop stories or thematic think-pieces about overarching topics		pool. More best practices from community- based research inspire and help others
Increase communication and outreach about partners and colleagues		learn. Colleagues feel empowered and celebrated.

# GOAL 4: Create a more efficient and streamlined administrative structure by improving the internal operations of the new center.

With a new center, CECE began examining its business model and internal operations. As CECE grows its business, building systems for budgeting, management, and funding are crucial. In comparison with the previous five-year average of 17 projects per fiscal year, CECE has 27 active projects currently with 13 projects valued at over \$50,000 currently. With more high-value projects, the need for streamlined, effective financial and business management increases. CECE identified four key needs: 1) revise the organizational structure and job descriptions to increase operational transparency; 2) collectively identify and promote funding opportunities to diversify and stabilize revenue streams; and 3) create mechanisms for better budgeting and more efficient management of work to ensure the sustainability of center operations.

As CECE has grown its staff and continues to grow, a revised organizational chart will improve communication across teams and redistribute management responsibilities across the Associate Directors and Director. The revised chart also establishes an administrative team and project-partnership team. By grouping these positions into teams, CECE facilitates improved business structures.



STRATEGIES	ACTIVITIES	MEASURES OF SUCCESS	
Revise the organizational	Develop and implement a new organizational chart.		
structure and job descriptions to increase operational transparency;	Revise and clarify faculty and staff job descriptions as needed to better share and articulate functions across the organizational structure.	Create a written organizational structure.	
Collectively identify and promote funding opportunities to	Develop a project-partnership team to regularly assess and pursue funding opportunities.	Faculty will attend at least 75% of scheduled project- partnership team meetings.	
diversify and stabilize revenue streams;	Periodically assess center funding streams (sources and monetary size) based on proposed and implemented projects.		
Create mechanisms for better budgeting and more efficient	Establish protocols around fiscal and administrative assistance.	90% of project budgets will be updated bi-monthly and accessible to the principal	
management of work to ensure the sustainability of center operations.	Improve budgeting transparency, tracking, and access.	investigator.	



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