



OUTREACH & INTERNATIONAL AFFAIRS
**CENTER FOR ECONOMIC AND
COMMUNITY ENGAGEMENT**
VIRGINIA TECH.

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Strategically Growing Your University Center

A Workbook of Suggested Framing and Activities

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Sarah Lyon-Hill PhD and Elli Travis

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 Virginia Tech *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 by leveraging university assets to build regional economic ecosystems that support innovation and high-growth entrepreneurship, resiliency, and inclusiveness. (Per EDA’s goal for its EDA University Center program)
- 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 created an opportunity to think and reflect holistically about the work we do and what we collectively propose to do in the future. This process helped us to implement and better prepare for our center’s growth in terms of revenue, people, and activities.

The following is a brief description of our process with timeline and examples of activities we pursued to think collectively about our center and its future. We split this process into three phases of work. In the first phase, we brainstormed and developed a vision, mission and goals based on internal discussions, iterative logic modeling, and reviews of other center structures and activities. In the second phase, center faculty and staff broke up into goal groups to focus on different areas of organizational growth. This phase included developing a goal statement, setting baseline metrics, developing strategies for growth and measures of success. The third phase is iterative over the next five years. It entails annual implementation plans and processes each year followed by end-of-year reflections and evaluation of our progress.

Planning Process Goals and Timeline:

The goals of this process were developed based on an initial kick-off survey and an examination of past group discussions regarding the needs of our center. Because CECE was doing this planning process in addition to our regular, day-to-day work, this process took us about two years. It could be shorter for others. It is important that at least one person with support from another be the driver of this process to keep the team on track. As such, most team members will only spend 1-3 hours on average a month on this work.

The goals and timeline for the process may vary among university centers, but the following can serve as a framework.

- Develop a shared mission, vision, values, goals and strategies
- Create targets and timelines for becoming/growing a center and reaching goals
- Build communication and collaboration amongst team by creating shared understanding of work and identifying how everyone’s work fits into the center
- Create shared approach to how we communicate to external audience
- Improve operations and ways we work together

TIMELINE		First Month	Q1	Q2	Q3*	Q4	Q5*	Q6	Q7*	Q8
PHASE 1	Kick-off meeting									
	University Administrative Work									
	Develop Mission, Vision and Values									
	Explore Comparable Centers									
	Logic modeling									
	Develop Basic Strat Plan Outline with mission, vision, values and goals									
PHASE 2	Develop Goal 1									
	Develop Goal 2									
	Develop Goal 3									
	Develop Goal 4									
	Develop Goal 5									
PHASE 3	Compile and Review Draft Plan									
	Tailor Strategic Plan for External Audiences									
	Identify Year 1 Priority Strategies and Create Workplans (small implementation groups)									

*Indicates quarter when the center would have a longer, 1-2 day retreat. The first retreat could include a summary and discussion around comparative center findings and a logic modeling process. The second retreat would entail mini sessions for each goal group, sharing goal group statements and current state of affairs, and brainstorming activities around strategies. The third retreat would then be a celebration where the team shares finalized goals, strategies, and implementation plans for the upcoming year.

Phase 1: Initiating Planning Process and Building the Framework

This first phase sets the tone for the process. Different types of activities are included so team members can give input through different formats: individual input, group input, and actively work on parts of the plan in small groups. Much of the larger group work was done each month at one of CECE's weekly business meetings.

This process should be inclusive of faculty, staff, and students working at the center. In some cases, a center may want to invite participation from outside partners. In Virginia Tech CECE's case, we had a partner from our cooperative extension agency participate in this work. Occasionally, we would bring in outside organization partners, particularly during our longer retreats, to provide outside perspectives and input.

TIMELINE	M1	M2	M3	M4	M5	M6	M7*	M8	M9	M10	M11	M12
Kick-Off Questionnaire	█											
Process Scoping Meeting	█											
Values Questionnaire		█										
Reviewing values meeting		█										
Explore Comparable Centers			█	█	█	█						
Present center comps and reflect							█					
Logic modeling session							█					
Vision, mission, values survey								█	█			
Vision, mission, values meeting									█			
Develop Basic Strat Plan Outline with mission, vision, values and goals										█	█	█

*Indicates month when the center would have a longer, 1–2-day retreat. The retreat could include a summary and discussion around comparative center findings and a logic modeling process.

KICK-OFF QUESTIONNAIRE

This survey is in preparation for the strategic planning kick-off meeting. Ask all team members to set aside some time to answer these ten questions to the best of their ability. Make sure they know that all input is valued considering the various lengths of time/experience in the center and different roles that each team members will have.

1. What most excites you about the potential of the new center?
2. What barriers does OED need to overcome to realize its full potential and impact?
3. What are the strengths and assets we need to bring to the new center?
4. What should the center look like in 2026? (5 years)
5. How should the mission statement of OED change as it transitions to becoming CECE? Currently, we use this language: "Our office helps organizations and communities by providing research and university connections that help them think strategically and find their own pathways to economic prosperity."
6. What strategies would help us to strengthen and lift up our existing regional partnerships?
7. What partners are missing? What partnerships should CECE establish to achieve its mission?
8. What strategies would make our center a "land grant exemplar"?
9. What would make us "thought leaders"? Thought leaders to who?
10. What outcomes do you want to achieve from this strategic planning process?

PERSONAL AND ORGANIZATIONAL VALUES QUESTIONNAIRE

This questionnaire is useful for an initial gauging of individual values, values that people see the center upholding, or values that may need to be incorporated into center work. Set a deadline for these questionnaires and present the findings at the next strategic planning meeting.

1. Looking back at the moments when you were most proud of the work you or your team did at OED, why exactly do you feel that way? On the flip side, what makes you most frustrated or angry?
2. Looking back at when you've overcome really difficult situations in your work, what got you through those times? What themes arise when you think about times when you've grown the most emotionally?
3. Thinking back to previous companies/organizations you've worked for, what did you love about how they operated? How would you describe their leaders and reasons for making big decisions? Conversely, what has frustrated you or made you want to leave your place of work?
4. Think of five people you respect immensely. How would you describe each person using just one word or phrase? Now do the same thing for five people you disdain or don't trust.
5. If a friend asked you to describe how decisions are made at work, how priorities are set, and what the "mindset" of the organization is, what would you say?
6. Imagine your company grows very quickly and vastly exceeds your financial goals, rewarding all stakeholders as an outcome in just a handful of years. What else would you want to be able to say you accomplished in growing the organization beyond monetary success?

Using your list of value statements or actions created from the previous questions, answer the following question:

7. Can you prioritize which of the values are most important to you or rank them? What's the difference between those at the top of the list and those at the bottom? Eliminate any that don't feel right for you. Avoid the temptation of producing values that you think other people will admire if those values don't truly resonate with you.

COMPARABLE CENTER INVESTIGATION

Consider three categories of comparable centers: 1) centers/offices/institutes/groups internal to the university, 2) those in other universities, and 3) those in the private consulting sector. Choose 3-5 entities that your office/center views as current or aspirational peers for each of these three categories. They could be considered peers depending on different contexts and activities that take place at your office/center. As much as possible, try to get each team member to review at least one center. Graduate assistants may also support this work by doing their own reviews, supporting faculty/staff in their reviews, and aggregating and analyzing the findings.

For each comparable center, answer the following questions:

1. What is their mission, vision and values? How do they describe themselves?
2. What is their organizational structure? Org chart?
3. Characterize their areas of work.
4. What are the events, activities, and services they market the most? How do they market?
5. How are they funding their work? Annual budget?
6. Who are their partners or stakeholders? How would they define "partners"?
7. Any interesting words or language used to characterize their group?
8. What might we learn from this group?
9. How would we differentiate ourselves from this group?
10. If affiliated with a university, how closely are they affiliated (in terms of funding, partnerships, personnel, etc.)?

PROGRAM MODEL DEVELOPMENT AND LOGIC MODELING

Create a "logic model"



The goal of program model development is to develop a shared understanding of the program so that progress against goals can be evaluated. Steps include:

- 1) Stakeholder analysis: which organizations or individuals have a stake in the program or are affected by it. Start with brainstorming using sticky notes. Ask questions like
 - a. Who benefits?
 - b. Who takes part in it?
 - c. Whose lives are affected?
- 2) Program review
 - a. Why does this program exist?
 - b. What are the main activities?
 - c. Where, why, and when does this program take place?
- 3) Logic modelling:
 - a. Activities: Well-defined, can be specific or general, depending on the nature of the program and model
 - b. Outputs: By-products of activities. Attendance lists, final reports. If something is done by a participant, it belongs here. If it is an effect on a participant, it should be in outcomes.
 - c. Short Term Outcomes: Earliest outcomes directly linked to activities. Can include changes in: awareness, knowledge, attitudes, skills, opinions, aspirations, motivations.
 - d. Medium-term outcomes: Sustained changes in short-term outcomes. Can include new or changes in: behavior, practice, decision-making, policies, social action. Or the spread of those effects from participants to larger groups to change.
 - e. Long-term outcomes/impacts: Ultimate effects connected to medium term outcomes. Occur beyond individual or personal level. Social, economic, civic, or environmental effects
- 4) Identify linkages, connectivity, and causal pathways between elements of the model

CECE Logic Model Elements:

Activities:	<ul style="list-style-type: none"> • Connections and collaborations • Applied research & technical assistance: funded activities with concrete outcomes as defined by project proposal. • Thought leadership: engagement in scholarly activities, writing for lay audience, professional leadership services, teaching/graduate mentoring, convening, and conducting programs and workshops
Outputs:	<ul style="list-style-type: none"> • Blogs, social media posts, newsletters • New ideas for collaboration among partners and faculty • Client facing reports • Meeting records and attendance lists • Presentations • White papers/policy briefs/toolkits/resources guides • Identification and connections of additional resources
Short-Term outcomes:	<ul style="list-style-type: none"> • Community motivation for action (if justified) • New ideas • Awareness of CECE capacity among direct contacts/participants/audience • Positivity about economic and community growth • Collaborative attitude • Community knowledge • Confidence building • Assumptions are demystified • Decision making skills • Industry knowledge
Medium-term outcomes:	<ul style="list-style-type: none"> • Not acting if it isn't justified/selecting best alternative • Sustained partnerships (despite staffing changes) • Multi-state, multi-institutional projects • Submission of grant requests • Funding for local or regionally-based development projects • Policy change • Awareness of CECE capacity among university and non-university community • National reputation • Increase in faculty engagement
Long-term outcomes:	<ul style="list-style-type: none"> • Community vibrancy • Increased agency • Increased social equity • Job and business growth • External investment • Better social outcomes • Diverse economy

VISION, MISSION AND VALUES SURVEY

The following survey should help team members to synthesize what they have learned thus far and apply it to writing possible vision, mission, and value statements. From these responses, one can synthesize draft statements for group review later.

Vision statement: Describe what change you want to see. This should be an aspirational statement.

Mission statement: Describes what you do to achieve that vision.

Values: Describe what you believe is necessary to do the work and achieve the vision.

Consider our past strategic planning discussions, your review of any comparable centers, the summary of comparable centers, and our logic modeling exercise.

1. What do you think we should consider or keep in mind as we move forward in this process?
2. Are there any aspects of the comparable centers that we should avoid? How do we preserve our niche while growing out?
3. When developing the Vision Statement for CECE, what principles, ideas or values should we prioritize? How do your principles and values intersect with the Center's vision?
4. Should our vision be more focused on what our Center will become, our Center's impact on regions and communities across Virginia, or other?
5. Off the top of your head, write a vision statement for the center:

Our current mission statement:

[Your mission statement here]

6. What principles, ideas, value or aspects should our mission statement prioritize?
7. Off the top of your head, write a mission statement for the center:
8. The following mission statements were inspired from past surveys and meeting notes. If we were to choose from the following mission statements, which would you prefer?
 - [multiple choice "mock mission statements" based on previous work]
9. Which would you least prefer?
 - [same "mock mission statement" list]
10. What do you like or dislike about any of these statements?
11. What three values best describe our center? We promote or embrace:
 - [multiple choice based on responses from Values Questionnaire]
12. Please provide any additional comments

VISION, MISSION, VALUES GROUP SESSION

Based on the above survey, develop and present a PowerPoint to stimulate discussion among the group.

Slide 1: Present four draft vision statements

- What 1-2 aspects do you really like about these draft statements? What would you want to have in our final vision/mission/values statement?
- Are there certain words you would choose or not choose as part of the final statement?
- What's missing?

Slide 2: Present four draft mission statements

- What 1-2 aspects do you really like about these draft statements? What would you want to have in our final vision/mission/values statement?
- Are there certain words you would choose or not choose as part of the final statement?
- What's missing?

Slide 3: Present a list of values

- Are we highlighting the right values?
- How would we describe these values in a way that gets at what we really want to embrace in our work?
- What values would we want to change?
- What values are missing?

SYNTHESIS

From the activities above, you should be able to develop a draft vision statement, goal statement, and list of values that can be used to inspire your day-to-day work and the rest of the planning process. Depending on where your group is at this time, you can continue refining and wordsmithing those statements as you continue into phase two.

During Phase 1, several needs and issues arise that can help you to identify your major goal areas for Phase 2. For Virginia Tech CECE, those areas were:

1. Work Portfolio
2. Partnership Development
3. Communication and Visibility
4. Organizational Operations/Administration

Phase 2: Goals and Strategy Development

Phase 2 should focus on developing and aligning goal statements, strategies, implementation steps, and measures of success with the decided-upon vision, mission, and values of the center. To make the work more manageable, CECE faculty, staff, and students were broken up into goal groups. Senior faculty were made “chairs” of each group, although it was emphasized that chairs facilitate the participation of all group members to better distribute the work so no one person spends more than 1-3 hours a month on this work.

TIMELINE	M9	M10	M11	M12	M13	M14	M15*	M16	M17	M18	M19*	M20
Assign goal groups												
Goal groups gather data and assess “existing state of things”												
Identify assets and challenges faced												
Develop goal statement												
Retreat to review all goal group findings and gather input												
Develop strategies and implementation activities to achieve goal (what can be done in 5 years?)												
Develop success metrics												
Present and Receive feedback from all faculty/staff/students												
Write up all findings (5-page section of strategic plan)												

*Indicates months when the center would have a longer, 1-2 day retreat. The first retreat of this phase would entail mini sessions for each goal group, sharing goal group statements and current state of affairs, and brainstorming activities around strategies. The second retreat would then be a celebration where the team shares finalized goals, strategies, and implementation plans for the upcoming year.

The following are instructions developed for each goal group. We provide example text based on our own experience, but this form should largely be developed based on a center's first year planning process. You may use this as a rough framework.

DEVELOPMENT GOAL INSTRUCTIONS

Review the goals of this process and consider ways of achieving these through the goal and strategy development 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 shared approach to how we communicate CECE to external audience.
- Improve operations and ways we do the work together.

Proposed Goal Development Teams:

- Goal 1 (Portfolio of Work): Scott (chair), Anna, Sarah, Emma (Student: Allison)
- Goal 2 (Partnership Development): Afroze (chair), Ashley, Rachel, Quina (Student: Jason)
- Goal 3 (Visibility): Mallory (chair), Julia, Elli, John (Student: Will)
- Goal 4 (Organizational Operations/Administration): John (chair), Doris, Emma, Sarah (Student: Hye-Jeong)

Goal Group Tasks:

1. Develop a concise goal statement
2. Frame the need for this goal and its different components. What is our current status and how might we improve it? Below are suggestions based on past group discussions:
 - **Goal 1 (Portfolio of Work):** Without boxing ourselves in, develop a framework for CECE's work that matches the vision, mission, and values of the center. How do we succinctly describe the work we currently do and where we excel? What work do we want to grow and how? The how should include: 1) an understanding of our current expertise and additional expertise needed; 2) ways in which faculty and staff may collaborate to make work more efficient and successful; 3) market and financial opportunities for growing specific lines of work; 4) anything else?
 - **Goal 2 (Partnership Development):** Define "partnership" or diverse types of "partnership." What do our existing networks look like and where do we need to grow? Maybe develop an inventory or map of internal and external partners. Strategies may include: 1) partnerships we need to strengthen in the coming few years; 2) approaches to monitoring partnerships; 3) approaches to building or strengthening collaborative partnerships; 4) anything else?
 - **Goal 3 (Communication and Visibility):** Describe CECE's current and future branding and marketing strategy. This should include: 1) the key stakeholders to reach; 2) strategies for outreach; 3) key publications (journal articles, op-eds, blogs) and presentations (national and state conferences; regional visits, etc.) that the group needs to prioritize; 4) timelines for implementation; 5) anything else?
 - **Goal 4 (Administration):** Develop the internal business structure of the new center, including: 1) the organizational structure and job descriptions; 2) current and future funding streams; 3) mechanisms for identifying and pursuing different funding streams; 4) mechanisms for better budgeting and management of work; 5) anything else?

3. Create a table outlining the key strategies, implementation activities and measures of success that will move the center toward our goal in the next five years. This table will help us to evaluate our progress as we implement the 5-year plan. This needs to be completed by ***.
 - Note that each goal may have 2-3 strategies, then several activities that push the strategy forward, and several measures indicating the strategy has worked.
 - Example of a “measure of success” for Partnerships may be: we will have X new partners in Y region at the end of the year

STRATEGIES	ACTIVITIES	MEASURES OF SUCCESS

4. Each group will draft a write up (no more than 5 pages) describing the goal, what existing conditions or current needs are behind the goal, and what are the strategies, activities, and measures of success that CECE will implement in the coming five years. Complete by ***.

Example goals:

- Become a preferred, go-to, or benchmark center for advancing economic and community prosperity through a high-value, high-potential, and high-quality portfolio of work
- Develop partnering capabilities that enable CECE to help partners to think strategically and find pathways to economic prosperity
- 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
- Create a more efficient and streamlined administrative structure by improving the internal operations of CECE

Phase 3: Strategic Plan Write-Up and Year 1 Implementation

In this phase, it is important to gather and synthesize all outputs from Phases 1 and 2. Celebrate your success. Then go ahead on deciding what small steps to implement in year one. Try not to bite off more than you can chew. In CECE’s case, we kept the goal group structure for implementation but allowed team members to switch groups if interested. Each group had the following charge:

- Set a trajectory and pace for the strategic plan goal. Keep us all accountable to this goal!
- With input from the rest of CECE's staff and faculty, identify feasible and measurable steps to take for the year. These should correspond with AUOs.
- Structure meaningful engagement from the whole group in CECE
- Keep track of progress. Troubleshoot when necessary.

TIMELINE	M21	M22*	M23	M24
Populate strategic plan outline with write-up from different phases and tasks				
Develop and format a user-friendly a summary plan				
Reorganize/Assign goal groups				
Goal groups create workplan for Year 1 of strategic plan implementation				

*Celebrate as a group

PROPOSED SECTIONS OF STRATEGIC PLAN AND RECOMMENDATIONS FOR MAKING IT MORE USER-FRIENDLY

- Introduction (1 page)
- Approach/What We Did (1 page)
- Vision, Mission, and Values (1-2 pages)
- Goal Sections (2-5 pages each depending; try to standardize across goals as much as possible)
 - Goal Statement
 - Description of the context for the goal and needs of center
 - Any important systems or outcomes of the strategic planning process (e.g. portfolio typology/description, partnership typology, communication/marketing methods, organizational structure)
 - A table of strategies, activities, and measures of success

YEAR ONE IMPLEMENTATION WORKPLAN

Each goal group should look at the center strategic plan. Based on the decided-upon strategies and activities, decide on 1-2 strategies to focus on and then 1-3 achievable activities within those strategies that will get the center closer to its goal during the coming year. Groups can consider:

- How would they like to build on the work thus far?
- What strategy(-ies) and activities should they prioritize in the first year that are achievable within one year? Consider how much time each activity will take for the group and for individuals.
- How will they go about implementing those activities?
 - Assign individuals to different tasks
 - Create a timeline

- Identify how often they will meet to keep everyone on track. Set these meetings up on a calendar
- Have a notetaker for each group meeting who will send out notes and next steps after each meeting
- How will they know they've completed those activities and they have been effective? Any specific measures of success?
- How can individual faculty, staff, and students contribute to achieving these annual objectives? Think of simple actions that an individual can take to help reach this year's stated measure of success.

CONSIDER ALIGNING INDIVIDUAL GOALS WITH LARGER CENTER GOALS

- Review each group's goal, strategies and activities.
- How does your work fit into each of these areas of work?
- What 1-2 activities or objectives do you want to focus on this year?
 - How do you want to improve?
 - Your goals can directly or indirectly support/align with the work of each goal group.
 - Your goals should be measurable!

POSSIBLE WORKSHEET

ANNUAL GOALS BRAINSTORM

Reflect on your annual goals for this year. This is an opportunity to better align our individual goals with that of CECE's goals, values, and strategies.

Projects and Programs

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

Other than reaching your annual dollar goal or other basic goals outlined in your job position, what 1-2 activities or objectives do you want to work on that will contribute to growing a high-value project and program portfolio for the office? Depending on your position, your goal may directly or indirectly support this goal.

Partnerships

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

What 1-2 activities or objectives do you want to work on that will contribute to growing CECE partnerships?

Communications and Media

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.

What 1-2 activities or objectives do you want to work on that will contribute to growing CECE's visibility and brand awareness?

Administration

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

What 1-2 activities can you do to help make our internal operations more efficient? This can be related to work that you already do or ways of supporting the work of other teammates.

Phase 4: Evaluation and Evaluative Thinking

"Evaluative thinking is critical thinking applied in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking, and making informed decisions in preparation for action". (Buckley, Archibald, Hargraves, & Trochim (2015))

Things you may hear or may ask to practice evaluative thinking:

- Why are we assuming x?
- How do we know x?
- Who might we be wrong?
- Why are we engaging partners in X?
- What evidence do we have for X?
- What's the thinking behind the way we do X?
- How does x connect to our intended outcomes?
- Do we have the right partners at the table to achieve X?

To evaluate the strategic plan implementation:

Step 1: Break down each goal into action items and sub-goals

Step 2: Identify the constructs associated with each action item. What does success look like? What do we mean by positivity and collaborative attitude?

Step 3: Identify indicators metrics associated with the constructs that can be feasibly collected over the time period

Step 4: Collect and continuously reflect on metrics, especially in years one and two of collecting them. Make data collection a shared responsibility amongst the entire team. Share updates quarterly.

Step 5: Analyze the data that has been collected, reflect on progress, update goals for upcoming year, update the logic model



Contact:

Virginia Tech Center for Economic and Community Engagement
1900 Kraft Drive
Blacksburg, VA 24060