Strategy in the Midst of Culture: Collaborative Leadership for Change

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Overview of Strategic Planning Process

**MISSION**
What is the purpose of the organization?

**CORE VALUES**
What are the enduring values that inform the work of the organization?

**VISION**
What is the desired future state of the organization?

**SITUATIONAL ANALYSIS**
What are our strengths? Weaknesses? External opportunities and threats?

**STRATEGIC PRIORITIES**
In what major directions will we focus our efforts to advance toward our vision?

**INITIATIVES/STRATEGIES**
What are the key initiatives involved in moving us forward in each area?

**ACTION PLANS, UNIT-LEVEL PLANS, BUDGETING, IMPROVEMENT**

**SUCCESS METRICS/PERIODIC EVALUATION**
How will we know we're successful?
Today and Tomorrow

What are the key initiatives involved in moving us forward in each area?

INITIATIVES/STRATEGIES

ACTION PLANS, UNIT-LEVEL PLANS
BUDGETING, IMPROVEMENT

SUCCESS METRICS/PERIODIC EVALUATION

Creating Unit-Level Plans

- Created in an inclusive and transparent manner
- Major goals for five years with specific objectives, actions and initiatives
- Align with and advance priorities and objectives in the University-wide strategic plan
- Prioritization and resource requirements
- Specific plan for collecting evidence of success
Timeline

• Progress reports due to the Provost

  October 19, 2012
  January 25, 2013

• Final plan due March 1, 2013

Reviewing Plans and Collaboration

• Collaboration and consultation are underway

• Planning group

  • Membership: Provost’s Council plus faculty representatives
  • Reviewing progress reports
  • Setting priorities

• Budgeting and resource allocation
Realities of Implementation

- No one wants a strategic plan that just sits on a shelf
- Change is hard
- Realities of our external environment
- Making the most of our time, talent, and treasure
- The need for collaborative focus
A Typology of Change

Typology of Change

<table>
<thead>
<tr>
<th>Pervasiveness</th>
<th>Depth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Adjustment (I)</td>
</tr>
<tr>
<td>High</td>
<td>Pervasive Change (III)</td>
</tr>
</tbody>
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From Eckel, Green & Hill, 2001

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Transformational Change

- Alters the institutional culture
- Deep and pervasive
- Intentional
- Occurs over time

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Will “culture eat strategy for breakfast?”

Organizational Culture

From Schein, 1992
Stages of Successful Change

- Denial
- Resistance
- Exploration
- Commitment

From Reynolds, 1994

An Example: Strategic Theme 6
Promoting Competitiveness and Accountability

- Develop a culture of continuous improvement
- Measurable indicators of achievement
- Coordination, communication, coordination across units
- Align resources with strategic priorities
- High standards of operational excellence
Strategic Plan Metrics

• The Strategic Plan includes a list of available metrics for each of the six themes.
  Baseline data on these metrics have been compiled in one place on the LMU intranet.
  • The site will be available to the campus community within the next two weeks.
  The data in this “scorecard” will be updated annually so that we can assess progress on the Strategic Plan.
  • Additional metrics to be added.
Collaborative Leadership for Change

• Building trust
• Communication, communication, communication
• Collaboration
• Taking a long-term view