



Integrating Social Infrastructure into Strategic Plans of Post-Secondary Institutions

Report from the University of St. Michael's College on Using Guidelines for Presidents and Planning Teams

Introduction

In July 2019 Colbeck Strategic Advisors (Colbeck) began providing the University of St. Michael's College (USMC) at the University of Toronto (U of T) with facilitation and coaching support for the development of their next strategic plan. Throughout the engagement, concepts, guiding questions and principles from "Integrating Social Infrastructure into Strategic Plans of Post-Secondary Institutions Guidelines for Presidents and Planning Teams" (the guidelines) were incorporated into strategy committee meetings, meetings with key leaders and large stakeholder engagements.

To make this conversation most relevant to the USMC community we used the terms social justice, common good, social impact, and service, interchangeably with "social infrastructure". This report will utilize those terms to represent social infrastructure as outlined in the guidelines. Below we present an overview of how we incorporated the guidelines throughout the engagement, key learning from our use of them, and recommendations for institutions who hope to utilize the guidelines in the future.

How the pandemic has impacted this process

COVID-19 hit approximately half-way through our strategy engagement process. This impacted our ability to conduct some in-person stakeholder engagements (most had fortunately taken place), advisory group meetings and a town hall. One positive outcome that emerged was the ability to assure our community that a commitment to the wellness of its members, social infrastructure, and our key priorities (that emerged through this process) would guide USMC through the turbulent time of COVID-19.

COVID-19 has only served to reinforce the importance of this work. This has been underlined in conversations with other University presidents since the early days of the pandemic. Universities looked to respond to the crisis in ways that were reflective of their missions and values. We have been asked to look outward in new ways to support our communities, seeing our role as a University in a new light. And even before the strategy was complete, it was already serving as a guide, while we were tested to answer urgent and consequential questions impacting our students and community.

How we incorporated "the guidelines" into strategy development:

Our strategy process included a mix of large stakeholder consultations, meetings with a small strategy working group (comprising 10 members representing staff, faculty, administration, students, the board and members of the religious and larger



communities) as well as meetings with key leaders. From December to March, working group and senior administration meetings occurred bi-monthly on a rotating basis. Most of the large stakeholder consultations occurred early in the process (fall 2019).

Our use of the guidelines can be separated into the following four stages:

1. Incorporation of the “internal stakeholder questions” into large stakeholder consultations.
2. Utilization of “structural options” during discussion of priority areas with the strategy working group.
3. Utilization of the “goals” during drafting of priorities with the strategy working group.
4. Incorporation of “prompting questions” into the vision and mission review process.

How the guidelines were incorporated into each phase of planning

1. Incorporation of “internal stakeholder questions” into large stakeholder consultations.

Below you will find the questions we asked at the large stakeholder roundtables (in October 2019 and in an online survey in November 2019) as well as the key themes that emerged. These questions were inspired by the guiding questions provided in the guidelines.

Imagine it's 2032 and we are celebrating St. Mike's 180th. What do we want to be able to say about St. Mike's with regard to student, faculty, staff, and alumni experience? What do we see? What do we feel? (similar to question in guidelines: “What could we accomplish in 10, 20 or 100 years if all obstacles were removed?”)

- Our Campus: is beautiful, accessible, sustainable, relevant/modern, vibrant, full of people and of high quality.
- Our Community: is actively engaged in critical discussion and social justice, connected to each other, open to and reflective of diverse identities, understanding and appreciative of our Catholic Identity.
- Our People: have the support needed to succeed, know how and are inspired to impact the world and celebrate their diversity.
- Our Educational Offerings: are high quality, relevant to modern needs and offered in small class sizes.
- Our Catholic Identity: serves as a beacon of Catholic Education in Canada.

What are St. Mike's most important assets/strengths currently? What differentiates St. Mike's currently? What resources, capacities, strengths do we have that we can contribute to generating a positive impact?

- People and sense of community
- Physical space and location

- Excellence in academics
- Values and ethos
- History and tradition
- Affiliation with U of T

What does St. Mike's need to start or continue doing to have a greater impact (to create the experience you expressed wanting to see above)?

- Shift our mindset from scarcity to abundance
- Invest in priority areas
- Enhance our brand through greater clarity and increased advertisement
- Empower and engage our people

Mapping this feedback to the guidelines

The thematic areas under “5.0 Goals” helped us organize these stakeholder responses. Specifically, our summarized responses linked very strongly with those bolded below (this list is taken from the guidelines):

- **Community engagement**
- Societal solutions
- Community/ social innovation and entrepreneurship
- Catalyst
- **Social responsibility and giving back**
- **Equity, diversity and inclusion**
- **Civic-minded students and alumni**
- **Transformative research**
- Technology for good
- **Sustainable operations**
- **Holistic institutional sustainability**

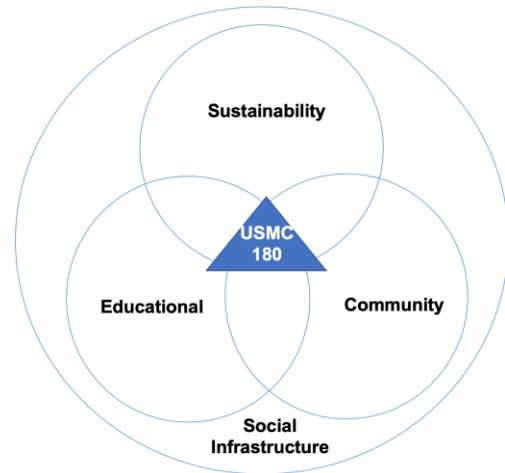
Once we identified these larger thematic areas, it became easier to organize our stakeholder feedback into potential priority areas.

2. Utilization of “structural options” during discussion of priority areas with the strategy working group.

The three priority areas that emerged from the above groupings were: Community, Education and Sustainability. Once our team decided to opt for the inclusion of social infrastructure within each priority, we created a venn diagram to display this relationship, and its overlap between multiple priorities. It was challenging to consider how each

priority might incorporate social infrastructure individually, and how each activity would fit exclusively into one priority. This diagram (shown on the right) permitted our strategy committee to think freely and creatively about how social infrastructure could manifest across multiple priority areas in the plan.

3. Utilization of the “goals” during drafting of priorities with the strategy working group.



Once the diagram and priority areas of Community, Education and Sustainability were set, we drafted strategic priorities, goals and activities. We utilized the “Goals” in Section 5.0 to offer suggestions for framing and language. The language in the goals was helpful in crystalizing the essence of each strategic theme that emerged.

4. Incorporation of “prompting questions” into the vision and mission review process.

We used both the “prompting questions to guide our vision statement” and “optional mission ideas” for discussion, during vision and mission development. The committee also referred to papal encyclical documents on higher education to guide its thinking. Initially the prompting questions from the guidelines were posed to the working group in January 2020. However, we chose to return to both the mission and vision at the end of the process to ensure they were reflective of the learning to date and could be drafted with additional community input. We struck a new mission and vision review group, which included the President, board members, faculty, and a representative from one of the founding religious orders.

Guiding questions:

Committee members were asked to reflect on a number of the “prompting questions to guide your vision statement” during the vision and mission statement development process. These served as helpful starting points to focus the committee’s discussions. The new vision, mission and values statements reflect a more outward focus for the university, on the impact it aspires to have on its members, on society and on the common good.

Previous Statements

Vision: The University of St. Michael's College, federated with the University of Toronto, seeks to be Canada's leading English-speaking Catholic University.

Mission: The University is dedicated to the pursuit and sharing of knowledge for its own sake and is committed to the study of the Catholic intellectual tradition within the context of faith and to fostering the creative engagement of that tradition with the widest range of academic disciplines as well as other traditions both religious and secular.

New Statements

NEW Vision: The University of St Michael's College will be a recognized leader in promoting respectful dialogue and action on care for our common home (Laudato Si) and solidarity with the human family (Fratelli Tutti).

NEW Mission: Grounded in the Catholic intellectual tradition, and committed to the education of the whole person, the University of St. Michael's College challenges all its members to exercise transformative leadership in service of the common good and care of all creation.

New Values Statements

- **Human Dignity:** We affirm and respect the intrinsic value of each person.
- **Community:** We foster and celebrate an environment of hospitality and inclusivity.
- **Social Justice:** We treat everyone in a fair and equitable manner.
- **Service:** We invite all persons to develop their unique gifts to build up the common good.
- **Sustainability:** We are accountable for making wise use of the resources entrusted to us.

A number of the key concepts from the guidelines were of particular interest to the working group and emerged organically through discussions. It was noted by committee members that there is significant overlap in concepts elevated in the guidelines and the encyclical documents, but the language needed to be tailored to our audience and personalized to St. Michael's Catholic identity.



Key learning

Successes

Validation of community desire for social infrastructure in strategic planning process

During stakeholder engagements, each group expressed a desire for USMC to continue and enhance its social impact through education and service. Interestingly, several key themes that emerged in these discussions align very closely to the “benefits” of incorporating social infrastructure into strategic planning as outlined in the guidelines. Specifically, the desire to improve community quality of life, to enhance/deepen USMC’s brand, to increase the ability to attract and retain top students, faculty and staff, to enhance USMC’s research portfolio, to enhance USMC’s external relationships, to better harness community assets, to better address community needs and to increase attractiveness of USMC graduates to future employers.

Additionally, many of these themes also mapped directly to each large “goal” identified in the guidelines. These results demonstrated a strong appreciation from the community for the intentional incorporation of social infrastructure principles into the strategic planning process and validated our decision to incorporate the guidelines.

Engagement of the community in social infrastructure conversations

By far, both the strategy committee and stakeholder groups were most excited and engaged in discussions when considering how the potential strategic priorities incorporated social justice. Though there is an emphasis on social justice in Catholicism, USMC community members were also quick to point out that the desire to incorporate a strong social justice lens into the operations and actions of USMC was not exclusively a result of the institutions’ religious affiliation. The guidelines provided a useful tool to help harness this excitement and validated the level of importance the administration placed upon developing priorities and goals related to social justice.

Clarity

The approach we utilized of combining the guidelines (prompting important questions during large stakeholder engagements), and implementing recommendations for layout and phrasing, was very helpful in clarifying the impact the USMC community is seeking. The guidelines provided an additional level of clarity when trying to synthesize and organize community discussions around social infrastructure.

Challenges

Non-linear process of incorporating the guidelines

Because our strategic planning process utilized a mix of large stakeholder engagements and small working group meetings, it wasn’t always clear which group would be the best recipient audience for certain components of the guidelines. For example, the guiding questions seemed to fit much better with the goals of our larger stakeholder engagements than our working group discussions. The goal of our working group meetings was generally to synthesize, validate and prioritize the feedback received from



the other engagements, and work on iterations of the draft priorities. It would have been helpful to have guiding questions that were targeted more towards the group tasked with making sense of the larger group discussions. It may also be helpful to have the document organized around key phases of a strategy development process to prompt some ideas for staging.

Structure of the social infrastructure priority

There was a lot of internal discussion about the best way to incorporate a strategic priority around social infrastructure. Our group went back and forth several times about whether to choose the option of social infrastructure as its own priority, or to have it woven into each priority area. Ultimately, we decided on the latter, because the community felt so strongly about the importance of social infrastructure as a whole. One challenge that we faced was the overlap between multiple priorities and social infrastructure. For example, two large priorities that emerged were academics and sustainability. There was a strong desire to include an enhancement of USMC's eco-theology department into the strategic plan. This priority would touch on both academics and sustainability as well as social infrastructure.

Recommendations for future presidents and planning teams

1. Make a plan for incorporating the guidelines before you begin

- **Decide upfront how best to incorporate the guidelines, and make an action plan.**
 - Consider how you plan to intentionally incorporate the guidelines into your process before you begin.
 - Have an upfront discussion with your team about why you want to use the guidelines and how you plan to do so. Gain consensus that use of the guidelines is of value to your community and fits with your desired strategic planning process.
 - Designate one person who is responsible for bringing your group back to the guidelines throughout the process. This person helps to mitigate starting with good intentions but ultimately letting this work drift away.
 - Design your stakeholder consultations with the guidelines in mind before you begin your process.
 - Brainstorm potential options for how social infrastructure will appear in your priorities. Presenting your community with options to react to may be more helpful than asking them to consider from scratch. It may also be helpful to look at the examples of other institutions.
- **Allow for flexibility.**
 - Though we didn't originally anticipate using the suggested "goal" language with the working group, that ended up being one of the most fruitful uses of the guidelines for us. While it is helpful to have a plan



for use of the guidelines in place, allowing for flexibility for new opportunities to incorporate the guidelines may also be beneficial.

- Adapt the guidelines to the language, history, and culture of your own community, as we did at St. Mike's. We substituted key terms we knew would resonate more with our community, such as "social justice".

2. Scan other relevant institutional documents for links to social infrastructure early on in your process

- **Consider potential linkages to the strategies of other affiliated institutions (external).**
 - When there are multiple plans that influence your institution, consider how they may impact your priorities that relate to social infrastructure. For example, we considered the U of T strategic plan.
- **Consider potential linkages to other existing work/documents (internal).**
 - Early on, consider how these guidelines may align (or misalign) with other institutional documents – for example, does a call to social justice exist within your mission?
 - We considered all of the following documents: the USMC internal academic plan, Ex Corde Ecclesiae, the Catholic Social Teachings, USMC mission, goals and inclusiveness statements.

3. Be intentional about who is engaged, how, and when

- **Identify board champions to have on your strategy working committee.**
 - Be judicious about who your representatives are from the board. We had a strong champion and having her on the working committee was very helpful.
- **Gain alignment upfront, iterate as you go and be sure to bring your audiences along the strategy development journey with you.**
 - A key point of success is not only having the right people engaged, but also to thoughtfully keep them updated and clear on where you are going.
 - Consistent, meaningful board engagement is also a key factor for success. We kept the board update along the way so that there were no surprises from either side when we presented the plan for approval.
 - As you are developing your plan, test it in your environment to ensure it resonates in the community, and context. The COVID-19 pandemic provided us a helpful test case for the priorities elevated during this process. Because we had clarity on our priorities, as well as community validation for them, we were able to make decisions



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efficiently and in a way that reaffirmed our commitment to each of them (including those directly informed by social infrastructure principles).