

Dear NCCs,

This packet was compiled because I felt it was necessary to follow-up on many of your concerns regarding the Strategic Planning Retreat that occurred over the Summer of 2004. The topic was brought up by Eliza Drown, the former MACURH Regional Director, and passed along to the NCCs during the MACURH 2004 boardroom. While many of you expressed concerns about the details of the retreat, I feel that this packet of information will quell those concerns. I have spoken to every Regional Director and National Board member regarding the Strategic Planning Retreat, all of them (except MACURH's representative) had positive responses about the purpose, planning, and execution of the retreat.

While I felt personal responses were not adequate for the level of conversation that was reached at MACURH 2004, I researched deeper and put together everything there is to know about what happened at the retreat and more. I asked the NACURH National Chair to respond to many questions you all had at MACURH, along with many of the issues that were not noticed during the boardroom discussion. Ryan Bricklemeyer, the National Chair, was extremely gracious in his answers and was eager to clear up any misconceptions or problems MACURH was having with the Strategic Planning Retreat and the details surrounding the retreat.

The packet includes the following information:

- *NACURH Strategic Planning Retreat Notes
- *NACURH Strategic Planning Retreat Review
- *NACURH's Vision and Mission Statement
- *E-mail between Ryan Bricklemeyer and Michael Marshall

My hope is that this will focus on the positives of the retreat, while recognizing that the SPR had its weaknesses, but that the positives far outweigh the negatives. If there are any questions, comments, or concerns; please direct them to myself and I will do my best to answer them or to direct you to the appropriate party that would be able to best answer your questions.

Respectfully,

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*******This was the agenda submitted to the attendees of the Strategic Planning Retreat.*******

NACURH Strategic Planning Retreat Notes

July 16 – 17, 2004

Tampa, Florida

Facilitator: Dr. Miller

In Attendance: Cullen, Issac, Eliza, Tia, Rosanna, Valerie, Paula, Jen, Jeb, Nina, James, Ryan, Matt, Jose, Jeb

A. Introduction / Expectations – *We were able to go around and share a little bit about ourselves.*

1. Name
2. From
3. Greatest Accomplishment
4. 3x5 Cards with Best, Worst, and Most Likely expectations of weekend

B. The Creative Process – *Broke into small groups to solve some of the below exercises to get our minds creatively thinking.*

1. SURVIVAL – A Simulation Game
2. Alphabet Exercise
3. Analytical or Creative? Positions problem sheet

C. The External Environment – *Looking at NACURH as an organization from an outside perspective of how others look at this organization from the outside. Talking about the components, individuals, and organizations that are outside of the leadership and membership of NACURH.*

1. Assumptions about the future (About NACURH Environment)
 - a. Colleges will continue
 - b. Residence halls will continue
 - c. Engagement will be valued
 - d. Colleges will run like businesses
 - e. Residence halls will be market driven – creative comforts
 - f. Change is certain
 - g. Conferences will have appeal
 - h. Uncertain economy
 - i. Networking is important
 - j. Potential for policy impact
 - k. Incorporation is forever
 - l. We'll have ability to have effect
 - m. There's room for us, but more than one possible form
2. Competitors – comparisons, differentiations
 - a. RA's

- b. SGA's – NEA, USSA
 - c. Activity Boards – NACA
 - d. Other student organizations (National) – BACCHUS
 - e. ACUHO-I / ACPA / NASPA
 - f. State organizations (of students)
3. Stakeholders – Who are they? How do they view us? What's our reputation?
- a. Member schools
 - b. Corporate Partners
 - c. Alumni
 - d. ACUHO-I
 - e. Student Affairs Administration
 - f. Moms and Dads
 - g. Leadership of NACURH
4. Opportunities
- a. Political Influence Potential
 - b. Potential to effect culture
 - c. Relationships w/ Professional organizations, and student organizations
 - d. Network potential with alumni
 - e. Strengthen / Develop Corporate buddies
 - f. Grow; Include all
 - g. Grants, Scholarships at campus level
 - h. Shape residential experience
5. Threats
- a. Perceptions held by older adults of college age students
 - b. Growth of off-campus as alternative
 - c. "Money" – Reduced budgets
 - d. Increase in business focus by campuses
 - e. Technology expectations
 - f. Perceptions of other student groups or of individual students
 - g. Time demands on students
 - h. Student indifference, lack of engagement
 - i. Business practices of corporate partners
 - j. Desires of professional association
 - k. Inertia

D. The Internal Conditions – *Evaluating the internal parts of the NACURH Organization and examining the leadership structure of the organization. We were able to take a close look at the values, principles, strengths, weaknesses, and the product that this organization gives to its members and those it works with.*

1. Organizational Values
- a. Student Development
 - b. Leadership
 - c. Service/Altruism

- d. Diversity
 - e. Integrity of leaders
 - f. Responsibility about substances
 - g. Trust in leadership
 - h. Growth / Improvement / Change
 - i. Advocacy / Representation
 - j. Unity / Teamwork
 - k. Recognition
 - l. Improving Campus Life (Residential)
 - m. Engagement
 - n. Opportunity
 - o. Sense of belonging
 - p. Potential for generational influence and impact
2. Core Principles
- a. Student Development
 - b. Leadership
 - c. Diversity
 - d. Growth / Improvement / Change
 - e. Recognition
 - f. Improving Campus Life (Residential)
 - g. Engagement
 - h. Opportunity
3. Defining the Product
- a. Resources for personal development
 - b. Resources for residence hall improvement
 - c. Resources of a network of peers
 - d. Celebration of accomplishment
 - e. Conferences / Learning opportunities
 - f. Career Preparation
 - g. Student Voice (?)
4. Strengths
- a. Diversity of regions
 - b. Morale of members
 - c. Diverse people, ideas
 - d. Opportunities for engagement
 - e. Uniqueness as organization
 - f. Passion / Commitment of leadership
 - g. Size (Really BIG!!)
 - h. Open – Mindedness
 - i. Ability to empower
 - j. Ability to create relationships
 - k. Energy of participants
 - l. Procedural consistency
 - m. NRHH
 - n. Potential of NIC
 - o. Dynamic presence, movement

- p. Programming comes from membership
- q. Conference is about members
- r. Volunteer based
- s. History as base
- t. NACURH-U
- u. Alumni
- v. Advisors

5. Weaknesses

- a. Diversity of regions
- b. Exclusivity of leadership
- c. Inability to see big picture
- d. Uniqueness as organization
- e. Inability of leadership to implement change
- f. Size (Really BIG!!)
- g. Unclear definition of product (see list)
- h. Capability of narrow-mindedness
- i. Limitations of procedures
- j. Factionalization (NRHH)
- k. Failure to train next generation
- l. Inefficiency of NIC
- m. Mobility, instability
- n. Lack of clarity in function
- o. No accountability structure
- p. Limited sense of organizational history
- q. Turnover in leadership
- r. Out of touch leadership who is not in tune with membership
- s. Program comes from membership
- t. Leaders distracted from connecting to membership
- u. Leaders act prematurely
- v. Leaders act in spurts
- w. Don't define selves clearly to members
- x. Not effective marketing selves
- y. Not effective in leadership orientation
- z. Limited application of NACURH-U

E. Vision – *Talked about the ultimate vision of the NACURH organization and what it would be in a perfect world. We highlighted the core elements that we felt were important to put into our vision statement. **Jeb and James will take these and develop a Vision statement by the end of the week (July 23, 2004)***

- a. Organization of choice for individuals
- b. Fiscal Stability
- c. Residential Environments characterized by comfort and community
- d. Campus voices made powerful
- e. Complete resources for campuses

- f. Student voice is 1st
- g. Ultimate residence hall environment
- h. Source of inspiration for positive change
- i. Residence Halls as prime principle aspect of campus life / college experience / learning environment

F. Critical Issues in Future – *Discussed issues that we as an organization see as issues within residence halls that our organization could be impacted by or be dealing with in the future.*

- a. Globalization
- b. College Student Demographic
- c. Technology
- d. Economy
- e. Privatization

G. Mission – *Discussed the purpose of NACURH, the actual business aspect of NACURH and what we do that is tangible or real, and then our strong values of NACURH. The values listed below are added onto the values that were listed before under the Internal Conditions.*

1. Purpose

- a. Voice – To advocate advocacy
- b. Welfare
- c. Procedures
- d. Leadership – Be the leading organization
- e. To foster personal growth
- f. To foster residence hall community development

2. Business Statement

- a. Leadership Development
- b. Opportunity for engagement
- c. Make resources available
- d. Liaison with ACUHO-I, other professional organizations, corporate sponsors
- e. Facilitate partnerships and communication
- f. Celebrate successful accomplishments

3. Values

- a. Enhancing Residence Living
- b. Diversity

H. Goals – *The group discussed goals that we felt we wanted to address and look at as an organization to take action on. We started with overall topics and narrowed them into 3 top goals that combined specific parts of the goals to make them possible to accomplish.*

- 1. Organizations parts and roles – and structure and international role
- 2. On-line access, communication
- 3. conferences, meetings – effectiveness
- 4. Marketing / recruitment / membership / P.R. / Printed Material

5. New Programs and Services
6. Acquiring political juice – being the voice, the advocate
7. Leadership development “curriculum”
8. Training leaders of organization
9. External relations with organizations
10. Development of standards – Who can represent us? How authorized?
11. Funding – Savings, raising \$, How spend?
12. Inclusiveness, diversity, enabling

The group grouped the top 3 goals that needed to be addressed:

1. Organizational Assessment
2. Conferences and online resources (delivery); marketing / membership / standards / inclusivity; new programs and services, leadership development
3. Training leaders; financing

I. Objectives – *These were the goals into actual objectives of accomplishing the ultimate plan when coming away from this retreat. We made sure to list specific goals under each heading and also listed the people and deadline that these objectives would be finished by.*

1. Evaluate Component parts, roles, and structures of NACURH
 - **NRHH – Cullen and RAD’s (Done by Semi’s)**
 - a. NRHH / NACURH – Evaluate, describe, relationships, accountability
 - b. RADs as part of above, hierarchy
 - c. Change if needed
 - **NIC – Jeb (Short term)**
 - a. NIC – accountability, nature, expectations, role
 - b. Permanent location?
 - **Regions – Valerie and Paula will recommend Consultants**
 - a. Regions – Roles, nature, relationship to national, distinctiveness
 - **State Organizations**
 - a. State Organizations – Roles, relationships with national
 - **Executive Positions - Valerie and Paula will Recommend Consultants**
 - a. Evaluate Exec. Structure and NBD
2. To Evaluate the effectiveness of our conferences and meetings and the feasibility of web – based resource sharing and communication
 - Conferences and Meetings**
 - a. Set goals for conference event – *Regionally based group – Collect feedback for Paula*

- b. Clarify relationship with host – *'05 Planners*
- c. Evaluate minimum performance standards and change as needed – *Jen and Paula*

Technology and Communication

- a. Evaluate NIC State or alternative and determine management and control – *NIC and Regional AD-Information and Technology*
 - b. Evaluate content needs – *Nina – Evaluate History*
 - c. Consider paperless, automates in transactions – *Long Term*
3. To develop a routine training and orientation program for NACURH leaders. – *All due by Semi's or before*
- a. Train Regional and Office Advisors to clarify expectations, identify needs – *Valerie, Ryan, and Paula*
 - b. Identify training / orientation needs of regional and office boards (elected officials) - *James*
 - c. Ongoing, continuing regular orientation and training – *Jen and Executives*
 - d. Explain how to get a leadership position and what's involved - *Executives*
 - e. Orient NCC, NRHH Leadership to duties – *James and Cullen*
 - f. Develop NBD transitioning plans (including orientation at Semi's and the National Conference) – *Jen*

J. Performance Evaluation Measures

- 1. We look the 3x5 Cards and evaluated how we felt the weekend was handled and the topics / issues we discussed were compiled. These were handed to Dr. Miller to evaluate the weekend.

*******These two pages were the contents of a handout submitted to the NCC's at MACURH 2004 by Eliza Drown and Peggy Cope, former Director and RA-Finance and Records, respectively.*******

NBD Strategic Planning Retreat Review

- Action Item Assignments
 - Actions assigned mainly to execs
 - No empowerment of NBD – recurring problem
- Budget
 - Only one option for the retreat was looked at
 - Completely planned by Advisor and outgoing chair
 - Longer planning time could have reduced cost
 - \$1000 for facilitator for 12 hours of work
 - Could we have gotten one for free?
 - Housing
 - Could we have gotten it for free?
 - MACURH does not pay for housing for RBD retreats (~12 people)
 - Food
 - Could we have gotten it for free?
 - Transportation
 - Retreat set in far corner of country, forcing flights to be long and more expensive
 - Because of timeline of finding out who was invited to the retreat, flights were not booked very early (within a month or less)
 - \$6000 total budget
 - Only 15 people attended
 - In MACURH, could have sent:
 - 30 delegates to NACURH (\$200 each)
 - 66 delegates to MACURH (\$90 each)
 - 100 delegates to No Frills (\$60 each)
 - MACURH RBD Fall 04 Retreat total cost:
 - \$836.05 (granted, just one region, but large geography and two outside region)
- Planning timeline
 - First introduced at pre-NACURH business meetings
 - Less than 2 months from announcement to actual retreat dates
 - Other options not explored
 - Retreat did not seem thoroughly thought through because of short planning timeline
- Schedule of retreat
 - Spent nearly 4 days in Florida (Weds at 5 through Sunday 10 am (average))
 - 89 hours total
 - 12 hours total in meetings

- 77 hours of downtime or 86.5% of our time
 - No other meetings of the NBD (structured)
 - Positive: Execs were able to meet
 - They seem more on same page and more prepared than previously board
- Follow up
 - No review since retreat
 - Told we would review in a couple of months
 - Now the plan is to not review until semis
 - Some of the people at the retreat will not be at semis, it would be good to review with everyone before term end for Nov-Nov
 - Told more specific report coming out – still none
 - Initial report not substantial to give to regions to explain what occurred; we were told not to tell our regions anything, that it all had to come from the chair
 - Therefore, our regions still do not have a good idea of what the NBD did
 - Vision statement was due out July 23rd
 - Sent out Sept 23rd
- NBD Attendance
 - Only half NBD could attend
 - No bonding as an entire NBD occurred / NBD does not seem to work together better now than before
 - 15 people to attend were chosen by execs – no input from regions
 - “Downtime” could not be used for anything more productive because only half NBD in attendance
 - No agenda given out ahead of time – could have sent out agenda of extra topics to discuss, discussed them with our counterpart and been prepared to discuss with NBD at retreat
 - Strategic planning retreats typically occur in the same manner, an agenda could have been sent out ahead of time explaining the entire retreat

*******These two statements were developed at the Strategic Planning Retreat:*******

NACURH's Vision Statement

The National Association of College and University Residence Halls, Incorporated, recognizes living on campus as an integral part of the college experience, and therefore strives to be the organization of choice for residence hall leaders by providing comprehensive resources for college and university students seeking to create the ultimate residence hall environment and experience.

Mission Statement

NACURH is the leading national organization advocating for the interests and welfare of residence hall students, while also providing opportunities for their personal growth and development. It is an organization of students committed to developing leadership, honoring diversity, recognizing achievement, as well as stimulating engagement and involvement among students who reside in college and university residence halls. Through regional and national programs and services, NACURH provides leadership opportunities for students, shares residence hall programming resources and best practices, and coordinates activities with appropriate professional associations and business partners.

*******The following questions were the contents of an email that I submitted to the Regional Chair, Ryan Bricklemeyer, concerning the events that transpired at the MACURH 2004 Conference. All of the questions posed were posed either by NCCs inside or outside the boardroom. The bolded responses are Ryan's responses.*******

a) Why was the retreat held in a section of the United States farthest away from the majority of the attendees? Why was it not held in a more neutral location, such as the Midwest?

Well, Florida is close to a 2 people who would be in attendance, as well as having a international airport that would not require people to have many or small flights that can be very expensive. It was also due to convince of having an individual, the national advisor, in a location where she could facilitate both the housing for the board and contracting the facilitator.

b) Why was a facilitator paid \$1000.00 for only 12 hours of work during the retreat? Could we have not gotten a facilitator for free? How was this facilitator chosen? What were his credentials?

The facilitator that was chosen due to his location in regards to the retreat and his availability to work with the group. I would ask that you refer to Valerie as to Dr. Miller's specific qualifications.

c) Why was \$6000.00 the budget of this retreat? This budget (spent on only 15 people) is enough to send 100 delegates to a MACURH No Frills conference. Or, to put it in a more closely-related time period, MACURH could send 30 people to NACURH for the \$6000.00 spent on this retreat.

Because the budget paid for travel, food, the facilitator and housing this was needed. No member of the NBD did, or should have, paid for any part of the retreat. The comparisons between this retreat and other conferences are difficult to equate, for some of the following reasons: SPR did not have a conference staff to cater to us during the retreat, which includes preparation of meals where MACURH and NACURH do; SPR did not have the ability to purchase bulk foods to save cost over the course of the retreat, where MACURH and NACURH do; SPR brought people in small numbers from across the country to a centralized place. No matter where it was held no more than 3 people would have driven to the retreat where MACURH and NACURH have many more ways to get to the conferences other than flying.

d) With a budget of \$6000.00, the 89 total hours spent at the retreat seemed underutilized. It is alleged that only 12 hours total was spent in meetings and that there was 77 hours of downtime. And during the 77 hours of downtime, there were no other structured meetings of the NBD. Why was there so much downtime? Was this downtime anticipated? Please explain in-depth the superfluous amount of wasted time.

Due to the nature of strategic planning the process calls for a great deal of critical thinking. Due to this the facilitator asked for the timeframes that we requested and we obliged. At the beginning of the retreat all participants were told that they were there to use the time effectively and focus on some of the critical issues that faced NACURH. Some of the individuals in attendance saw the opportunity to do this and used the times that were presented for discussions such as May-May vs. Nov-Nov transitioning; the overall look of NACURH in regards to regional size, proportion and division; The specialization of the tasks performed by each office that NACURH maintains; and the need for the Creation of an executive to represent NRHH. Others at the retreat felt that they did not want to do anything without their NBD counterpart, although told to do otherwise, and made that clear to individuals at the retreat, instead of prior to it. It was the thought of the executives that they did not need to directly oversee what the other members of the board were doing because they had the opportunity to accomplish a great deal of the things that would not have been able to be done until Semis. That opportunity was capitalized on and the Execs have made a great deal of progress with their positions and for the Organization as a whole.

e) Why has there not been a promised follow-up to the retreat? It was originally promised that a follow-up would be submitted "in a couple of months," but then that deadline was extended until Semi-Annuals. Unfortunately, not all of the executives that attended the Strategic Planning Retreat will be at Semi-Annuals; therefore, what is the point of reviewing the situation if most of the board did not participate?

This decision was made solely by me, the chair due to the following reasons: I felt that we needed to concentrate on Regional Conferences when they were coming around, due to the many concerns that came up with them. It was necessary to focus on some of the things happening outside the NBD's timeframe control particularly the OCM and USA Today Contract Discussions. There were and are other concerns that should be worked on during that timeframe, particularly by those that were completing their term on the NBD. I feel that this decision was justified as I was selected for the position to make sure that the priorities of the organization are being met. The process of Strategic planning is one that you consistently revisit and setting up a timeframe that Semis and Pre Conference the NBD can revisit the outcomes will be effective in the long run for the organization. As for those three members who were at the retreat who are no longer on the board I am hopeful that they transition positives, negatives, outcomes and concerns with those who are succeeding them in their positions

f) Why were the participants told not to tell their regions anything and that all the information had to come from the NACURH Chair? If \$6000.00 was spent of our constituent's money, do you not believe that it is the duty of the participant to report on the retreat?

It was requested that the participants not say anything until the vision and mission Statements were crafted and sent out. Because these were Organization wide statements it was appropriate for the chair to be the one that released these statements. There was also an initial report crafted and made public soon after the retreat. At no time were people told to say nothing, rather that there opportunity would come after certain statements were made for the whole of the organization. Almost all regions gave a strategic planning report during their regional conferences and a more detailed report from the chair will be made public soon.

g) Why was the NACURH Vision Statement sent out September 23, 2004 when it was promised July 23, 2004?

Due to the nature of these statements they took time to be crafted and needed to be truly what the organization wanted to put forward to the rest of the world. Vision And Mission statements are as much for the outside world as they are of the organizations Membership and it was important to make sure these statements, the first NACURH had ever crafted appropriately portrayed our organization

h) Why were the 15 people in attendance chosen by the Chair and not the region? It seems unfair that while the Director is the elected representative of their region, the Chair was able to choose who attended and not the regions.

This was done for logistical reasons. Because the retreat had to happen during the summer there were people who would not be able to attend due to other commitments. In order to ensure that there was a good mix of directors and Ads, New and old board members, the chair went to each region with the director or AD, both of whom are selected to represent the region, that they were requesting to attend the retreat. Each Director and AD were told that if there was any concern about their regions selection to speak with the chair and something would be worked out. Also the process of strategic planning requires a manageable number of participants and 15 was chosen to make sure that all areas of the

organization were represented, while still allowing the group to be effective within the process.

i) Why is NACURH considering Resident Assistants as threats? Should we not be cooperating with the Resident Assistants to improve our organization?

Based on My notes for the retreat this is a slightly incorrect question. RA's were identified as competitors of our organization, not threats. To put this in context other competitors that were identified included, SGA's and their National Organizations, Activity Boards and their National organizations, State Organizations and professional organizations (ACUHO-I and ACPA). Each of these groups fight for the same resources, students and finances, on some level, campus, regional or nationally as NACURH. We do have great relationships with some of the groups that are mentioned however, when looking at the big picture the mere existence of these groups makes them competitors.

j) What was the purpose of the retreat? Did the retreat meet its purpose? Why could the goals of the retreat not be met at Annuals or Semi-Annuals?

The purpose of the retreat was to go through process of strategic planning for NACURH Inc. This process is one that takes time, more than could have been allotted at either of the other Meetings of the NBD. Also in order to be effective the entire NBD could not be present. I believe That the retreat not only meet it's specific purpose, but also had secondary benefits of team building planning for the NBD, the Execs in particular.

k) If the plan of the retreat was to "empower the NBD," did the retreat accomplish this goal?

I unfortunately think that again this is a misstatement of the goals of the retreat. While I think that many of the NBD did become empowered at the retreat this was not the primary or stated goals. I think it was stated to the attendees to make the most of the retreat, be empowered, and those that were motivated To do so did, and those that were not did not.

l) Why did Housing and Food cost? Could the NBD perhaps done further investigation as to another potential host school that would have covered some, if not all, of the food and housing?

Yes, I think that the NBD could have done this, with that said I think it is important to recognize the need to have this retreat. Each of the chair candidates has this in their bids and the passed executive had planned this retreat. Again due to the need some aspects of this retreat were a bit rushed, but I believe that the rewards out weigh the expense. Yes we are a student run corporation that must always be good stewards of our members monies, but we must also be progressive in order to become the premiere organization for Residential Students across the county and the world. In order to be that important organization some expenses are necessary and if we always wait for things to be completely optimal we will be left behind the curve and our importance as an organization will slip. We must take certain risks in order to gain high rewards, and I believe that the Board of directors were selected to do this and make sure that both the finances and interests of our current and future members are always balanced when making decisions.

m) What were the positives and negatives of this retreat? If you were to have another Strategic Planning Retreat, what would you do differently?

I think that the outcomes of the retreat are the positives, obviously the positives of creating the vision and mission statements that will help guide our organization is incredibly important. I also believe that some of the group dynamics that were able to play out during the retreat will better prepare the group for the Semi annual meeting and make us very productive for the rest of the year. I think the true benefits of this meeting will not be seen for some years. It is only as the organization continues to reach for the crafted vision that we will see the true benefits.

For negative I must point to only one. There was not buy in by all the participants, prior to their arrival, that the retreat would be or could be positive. I think that played a large role in some of the shortcomings of the retreat.

As for another retreat I am going to not answer this question. The process of Strategic Planning is one that is unique when it comes around. You Plan and then revisit until you have reached a point where the initial plan is no longer one that the Organization feels is adequate. Because there would be an extended timeframe for when NACURH will again go through the process of Strategic planning, and our organization could be in a very different place, so my comments may sway something that the chair and board at the time should not use, because I am answering this question now and they will be working in NACURH then.