**PATTERNS and PROCESSES**

- SPSC full meetings – periodic from October – present (n=13 between October 5th and February 23rd); meeting lengths ~ 2 hrs
- Structure: Facilitator and Recorder first six meetings, formal Chair and Recorder since 12/14/16); approved agenda; meeting minutes; loose application of Robert’s Rules; various working groups (n=7 groups for goal assessment, n=4 groups for other work)
- Meetings open to the College community: usually 1-3 students in attendance
- Active Google Drive shared amongst SPSC members with much old and new strategic planning and visioning materials that was built upon on a bi-weekly basis
- Communication outside SPSC: presentations (sometimes multiply) by Chair and other SPSC members to Academic Governance, Academic Council, Executive (Full) Cabinet, and Departments

**STEPS**

Step 1: convened as the renewed Strategic Planning Steering Committee (SPSC)\(^1\) on October 5, 2015
  - Charged by President Wheeler that first meeting

Step 2: set aside 9/15 draft and agreed to produce an update to *Vision 2020* (October 2015)

Step 3: assessed *Vision 2020* goals (n=7) and targets (subgoals and objectives) (n=75) for degree of achievement (October 2015-March 2016)
  - Seven goals were assigned to small teams of Strategic Planning Steering Committee (SPSC) members\(^2\)
  - Key documents: 2011 Middle States Self Assessment; SUNY Excels 2015-2016; unit and department reports (received December 2015-February 2016)

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\(^1\) Strategic Planning Steering Committee (SPSC) members from 2015-2016: SB – Scott Bergey; KD – Kelley Donaghy (Recorder); MFE – Maureen Fellows; MFO – Margaret Foley; RF – Robert French; BG – Brenda Greenfield; RH – Richard Hawks; ML – Mark Lichtenstein (Facilitator); AL – Anne Lombard; VL – Valerie Luzadis; CN – Chris Nowak (Chair); NR – Neil Ringler; JR – Joe Rufo; SSA – Sue Sanford; CS – Chuck Spuches; SSH – Scott Shannon; AS – Art Stipanovic; and JV – John View

NOTE: RH, CN, SSA, AS, and JV were elected to serve on the SPSC by ESF’s academic community in September 2015; NR, CS, and SSH were invited to join the committee by the SPSC in fall 2015; all other SPSC members were from the original strategic planning team

\(^2\) Goal 1: CN, MFO; Goal 2: KD, SB, AL; Goal 3: RF, SS; Goal 4: BG, MFE; Goal 5: AS, ML, NR, CS; Goal 6: RH, CS, AS, NR; Goal 7: JR, JV
Matrix/spreadsheet created that documented degree of subgoal accomplishment and source of information

Step 4: developed a framework of components for the Update (first proposed in November 2015 and vetted/updated since through various committee and community engagements)³

Step 5: requested new information from Units and Departments in mid-December 2015 on: 1) recent accomplishments (over the past 5 years, with a focus on institutional bearing); 2) goals and aspirations (next 5 years); and 3) differentiators – due date was January 15, 2016. To date, 23 units and departments have submitted reports⁴

Step 6: teams of four people⁵ from the SPSC blended and bridged original Vision 2020 text with new planning information for the following Vision 2020 Update components (January-February 2016): Vision and Mission; Academic Direction; and Diversity and Inclusiveness. Additionally, a four-person communications team was formed.

- Key documents – general: Vision 2020; draft strategic planning document dated 5/7/15 and 9/15/15
- Key documents – specific (especially for Academic Direction): Transdisciplinary Question reports (n=4) from March 2015; Undergraduate Strategic Planning Committee Report from March 2015
- A new Goal 8 was created on diversity and inclusiveness

Step 7: Academic Directions diagram and accompanying narrative was shared with select groups in the College community, with edits and adjustments made to both based on critique and other feedback

- Presented to: Academic Council in January, various Departments in January-February

Step 8: Communication team developed a strategy for working with the ESF community (January-February 2016)

³ Update framework shared with ESF community (feedback opportunities) via meeting presentations with: Full Cabinet (12/7/15), Academic Council (12/8/15), President Wheeler (12/14/15, and 2/19/2016), and select Departments (per their requests), including (Forest and Natural Resources Management (1/13/16), Environmental Studies (1/20/16), and Chemistry (1/29/16).

⁴ Adirondack Ecological Center, Business Office, Chemistry Department, Communications Office, Environmental and Forest Biology Department, Environmental Studies Department, Environmental Resources Engineering Department, Forest and Natural Resources Management Department, Forest Properties, Honors Program, Human Resources Department, Landscape Architecture Department, Moon Library, Office of Athletics, Office of Financial Aid and Scholarships, Office of Research Programs, Office of Undergraduate Admissions, Office Instruction and Graduate Studies, Paper and Bioprocess Engineering Department, Ranger School, Student Affairs Division, University Police, and the Writing Program.

⁵ Update components and SPSC team members: Academic Direction – SSH, VL, NR, SSA; Diversity and Inclusiveness (a new Goal 8) – JV, MFO, AL, JR; and Vision and Mission – RF, MFE, RH, CS. A fourth team was formed to take care of communications: BG, SB, KD, ML.
- Met with a possible professional facilitator (Katie Doucette of “The Leading Element) in early February, but due to cost and time constraints, the Communication Team decided to stay in-house
- Communication plan set in motion on February 23

Step 9: President’s review of Academic Direction: Request made on February 15, 2016, review returned February 19, 2016

Step 10: Goal assessments completed using information from the Unit and Department reports (January-February 2016)

Step 11: developed remaining Update component under the purview of the SPSC: opening statement from SPSC; “ESF Values”, sustainability commitment, SUNY Excels connection, and “Acknowledgement and Recognitions” (which includes the list of documents as presented at the end of this methods document, below)


Step 13: SPSC Review of DRAFT Update on February 26 and March 2; development of second draft

**PENDING STEPS**
- President review of DRAFT Update
- President’s Statement and Initiatives
- Communication February-May: Information Sessions, web, opportunity for community assessment of DRAFT Update

Document source: SPSC February 29, 2016
LIST OF KEY DOCUMENTS USED IN UPDATE

ESF Unit and Department reports, December 2015 through March 2016

ESF Strategic Planning Document, May 7, 2015, DRAFT FOR DISCUSSION ONLY

Diversity and Inclusion from the Ground Up, December 2015

FOUNDATIONS FOR A SECOND CENTURY, ESF’s Strategic Plan, Fall 2015, DRAFT FOR REVIEW AND COMMENT (Version 1: 9/15/15)

Middle State Reaccreditation, 2011 Self-study Challenges and Recommendations

Middle State Reaccreditation, AY 12/13 SUNY-ESF College-wide Metrics

Middle States Reaccreditation, Advancing Sustainability at ESF, A Selected Topics Self-Study for MSCHE Reaccreditation, October 2011

SUNY Excels 2015 Performance Improvement Plan, Attachment 1: Narrative

SUNY Excels: Date Executive Summary, January 2016 (presented in “Envir Sci Forestry SUNY Excels Data Summary Graph amd Detail Tables_Final.xlsx”)

Transdisciplinary Question #1: What are the relationships between humans and the environment? Committee report dated March 2015

Transdisciplinary Question #2: What are earth’s species and dynamics? Committee report dated March 2015

Transdisciplinary Question #3: How can we meet human needs while conserving the environment? Committee report dated March 2015

Transdisciplinary Question #4: How can we adapt to changing environments? Committee report dated March 2015

Undergraduate Strategic Planning Committee Report, March 2015

Vision 2020, SUNY COLLEGE OF ENVIRONMENTAL SCIENCE AND FORESTRY, circa 2003