Higher Learning Commission

Form

Open Pathway Quality Initiative Report
Institutional Template

The institution uses the template below to complete its Quality Initiative Report. The institution may include a report it has prepared for other purposes if it addresses many of the questions below and replaces portions of the narrative in the template. This template may be used both for reports on initiatives that have been completed and for initiatives that will continue and for which this report serves as a milestone of accomplishments thus far. **The report should be no more than 6,000 words.**

Submission Instructions

The report must be submitted by June 1 of Year 9.

Submit the report as a PDF file at hlcommission.org/upload. Select "Pathways/Quality Initiatives" from the list of submission options to ensure the institution's materials are sent to the correct HLC staff member. The file name of the report should follow this format: QIReport[InstitutionName] [State].pdf (e.g., QIProposalNoNameUniversityMN.pdf). The file name must include the institution's name (or an identifiable portion thereof) and state.

Date: June 20, 2025

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The enclosed Quality Initiative Report represents the work that the institution has undertaken to fulfill the quality improvement requirements of the Open Pathway.

6/23/2025

Signature of Institution's President or Chancellor *Date*

Brock Tessman, President

Printed/Typed Name and Title

Northern Michigan University

Name of Institution

Marquette, Michigan

City and State

Report Categories

Overview of the Quality Initiative

1. Provide a one-page executive summary that describes the Quality Initiative, summarizes what was accomplished and explains any changes made to the initiative over the time period.

Through the work of the Quality Initiative, Northern Michigan University fundamentally transformed how we approach strategic planning, moving from fragmented, episodic efforts to a coordinated, sustainable system grounded in collective impact. This three-year journey fundamentally changed not just *what* NMU plans, but *how* we plan strategically, creating systems and culture that will sustain institutional improvement far beyond any single strategic planning cycle.

The initiative began in November 2021 during a period of significant leadership transition with an interim president who had postponed retirement to guide the institution and an active presidential search underway. Recent strategic planning efforts had focused on initiatives over systems, resulting in talented teams doing great work but without clear mechanisms to account for effectiveness or contribution to institutional direction. Through the Quality Initiative, we sought to address this fundamental challenge by establishing and improving strategic planning systems with clear goals, action plans, tactics, outcomes, deadlines, and accountability.

Collective impact provided the theoretical foundation for this transformation, recognizing that complex institutional challenges require coordinated effort across multiple stakeholders rather than isolated actions. The conditions of collective impact (a common agenda, shared measurement, mutually reinforcing activities, continuous communication, and backbone support) guided NMU through the two major phases of work that built upon each other to create lasting change.

First, we focused on building a sustainable planning culture rather than simply creating another plan. As NMU devoted attention to strategic planning, the backbone work was assigned to a campus office that was undergoing growth. An FTE was added to the Institutional Effectiveness unit for the coordination of strategic planning and leading integrated planning processes. The cultural transformation touched every aspect of our university, from how committees operate to how success is measured and communicated. The Interim Strategic Plan developed during this phase (implemented 2022-2024) provided a foundation for NMU's new approach to planning and played a tangible role in attracting new executive leadership.

Second, leveraging these improved systems and culture, NMU developed *Our Compass*, a comprehensive strategic plan created through a process that included an extensive level of community engagement involving over 1,500 faculty, students, staff, leaders, and regional community members. *Our Compass* established three Grand Challenges — Supporting our People, Partnering with our Place, and Realizing the Potential of All our Students — each with specific strategies, measurable outcomes, and clear accountability structures.

The transformative impact of this work is evident across the university. The President's Leadership Council was restructured to focus primarily on strategic planning oversight. Students were trained as facilitators to lead multiple waves of engagement, creating both student leadership development opportunities and neutral environments for gathering feedback. Public dashboards demonstrate new levels of transparency for NMU by showing the actual progress of strategic efforts and investments. Executive sponsorship structures ensure accountability at the highest levels of leadership. Focused action teams plan and carry out strategic tactics, co-led by a faculty member and a senior administrator to ensure horizontal leadership. Through this Quality Initiative, NMU has moved from performative to

functional strategic planning, creating and maintaining systems that engage the entire campus community and external stakeholders in continuous improvement.

Scope and Impact of the Initiative

2. Explain in more detail what was accomplished in the Quality Initiative in relation to its purposes and goals. (If applicable, explain the initiative's hypotheses and findings.)

Through the Quality Initiative, NMU sought to establish strategic planning systems with clear goals, action plans, tactics, outcomes, deadlines, and accountability. This transformation achieved two major accomplishments that built upon each other to create lasting institutional change.

Building a Planning Culture: Collective Impact as Foundation

The transformation of NMU's institutional culture to support sustainable planning was explicitly grounded in the conditions of collective impact, recognizing that changing institutional culture requires coordinated effort across multiple stakeholders rather than isolated, disconnected or even competing actions. The framework provided both a theoretical foundation and a practical structure for this complex undertaking.

The theory of change for cultural transformation applied all *five conditions of collective impact* comprehensively:

1. A common agenda
2. An established system of shared measurement
3. Mutually reinforcing activities
4. Continuous communications
5. Strong backbone supports

Through integrated planning, NMU established *Our Compass* as the common agenda for cultural transformation and strategic direction, with all stakeholders — faculty, staff, students, administrators, and external partners — working toward the collective goal of creating a comprehensive and sustainable approach that builds relationships and aligns the organization for change. This shared vision provided the "North Star" that guided the various efforts toward one common purpose.

Shared measurement systems were developed through the team-based creation of strategy Action Plans, outlining the detailed tactics to be undertaken, accountability, project start and end dates, and how progress will be measured. A new public dashboard reports the progress metrics regularly, indicating the status and health of tactics. A new glossary has standardized planning-related terminology. The shared measurement condition is also enhanced by the integration of Institutional Effectiveness decision-support and traditional institutional research projects into the strategic work. Campus-wide assessment tools provide indicators that all stakeholders can use to assess progress toward our goals. This integration moved beyond simply collecting data to ensuring that measurement informs action across all institutional levels.

Assuring mutually reinforcing activities is another outcome of the collectively developed strategy action plans. Tactics, or strategic projects with set start and end dates, are detailed publicly, informing campus and beyond about NMU's strategic activities and who is accountable. As the action plans are authored, opportunities arise to check and balance with other strategies and enhance institutional efforts where possible. Mutually reinforcing activities have also emerged through the application of Strategic Doing and Lean Thinking methodologies. Strategic Doing provides structured processes for cross-campus collaboration, resource optimization, and inclusive planning that reinforces the cultural shift toward

coordination rather than competition between departments. Lean Thinking creates systematic approaches to eliminate waste and improve efficiency that supports the shared goal of becoming a more effective institution. We have implemented these practices together, creating synergies that amplify their individual impacts.

The implementation of Strategic Doing was a particularly significant cultural shift for NMU. This scientifically grounded practice developed at Purdue University and implemented internationally creates adaptive, collaborative tactics through structured conversations guided by four key questions:

1. *What could we do?*
2. *What should we do?*
3. *What will we do?*
4. *What's our 30/30?* (Or, what is the concrete plan with specific actions and who is to complete them in the next 30 days?)

These questions move groups from ideation through prioritization to concrete action with built-in accountability. The methodology's emphasis on rapid action through pathfinder projects counters academic tendencies toward extended deliberation without action.

The integration of Lean Thinking principles has encouraged continuous improvement and data-driven decision-making in planning and other processes. The Institutional Effectiveness Office now leads systemic efforts to apply Lean concepts, working with departments to eliminate non-value-adding activities, reduce bureaucratic hurdles, and optimize resource allocation. This wasn't simply about efficiency, but rather is about creating more value for students and other stakeholders by focusing efforts on activities that truly matter.

Continuous communication through regular check-ins, reviews, and data-informed decision-making processes has built trust among participants and supports continued coordination across the institution. The Institutional Effectiveness office has established multiple communication channels tailored to different stakeholder needs, from technical reports for implementation teams to story-based updates for the broader community, keeping all stakeholders informed and engaged regardless of their expertise or role.

Finally, the IE office serves the essential backbone functions by coordinating meetings across multiple planning efforts, documenting changes in accessible formats, building metrics databases that track progress transparently, listening across steering committees to identify synergies and conflicts, and coordinating communications both up to leadership and across the organization. This centralized support proves crucial because expecting individual departments to manage these coordination details would have greatly slowed progress and added burden throughout the university.

In the three years before the initiative, the university dramatically increased investment in Institutional Effectiveness, growing the unit from a two-person institutional research office focused predominantly on reporting and statistics to a five-person Institutional Effectiveness team with expanded responsibilities in accreditation, assessment, and analytics. During the initiative period, an additional FTE was added to fulfill the “backbone” organizational infrastructure, dedicated staff, specific skills, and resources needed to coordinate efforts across the institution, integrating strategic planning with other core functions.

Construction of *Our Compass*: Collective Impact at Scale

Building on the cultural foundation and systems established in the interim phase, *Our Compass* coordinates efforts across NMU and with external stakeholders to address complex higher education challenges. The three-phase development approach built a common agenda across all stakeholders,

ensuring the strategic plan communicates shared goals rather than competing priorities. This approach recognizes that sustainable strategic planning requires genuine buy-in from all stakeholder groups, not just compliance with administrative directives.

Phase 1, "What Could We Do" (Fall 2023), established a common agenda through systematic visioning that honored both internal capabilities and external community needs. A Community Mission and Vision Survey, developed with national branding agency Ologie, gathered input from over 600 students, faculty, staff, alumni, and community members, with key themes emerging around hands-on learning, community connection, and the Upper Peninsula's unique environment. A Community Visioning Dinner engaged more than 65 community members in student-facilitated discussions about NMU's mission and future vision.

Phase 2, "What Should We Do" (Winter 2024), built shared measurement and mutually reinforcing activities by distilling community input into coordinated strategies. A Board of Trustees Workshop engaged board members, administrators, and student representatives in perfecting the new mission and articulating shared vision, followed by a campus-wide Mission and Vision Survey generating 400+ comments. Student-facilitated Campus Engagement Sessions involved more than 80 participants across 11 sessions, gathering feedback on NMU's new mission, vision, and strategic Grand Challenges while ensuring key governance bodies shaped the strategic direction.

Phase 3, "What Will We Do" (Fall 2024), channeled this input into NMU's established planning system, enabling transparent and tested implementation processes. The extensive listening produced a new mission, clearer vision, 3 Grand Challenges, and 11 implementation strategies. President Tessman unveiled *Our Compass* at NMU's Fall 2024 convocation ceremony.

Grand Challenge 1, "Supporting our People," coordinates previously separate initiatives around wellbeing, Indigenous perspectives, diversity and inclusion, and sustainability. NMU adopted the Okanagan Charter for wellbeing efforts, while the new Opportunity and Empowerment Hub creates shared measurement systems for belonging initiatives. The Carbon Neutrality Plan establishes mutually reinforcing sustainability activities across campus operations.

Grand Challenge 2, "Partnering with our Place," aligns institutional efforts with community partners' needs through their direct involvement. This challenge employs mutually-reinforcing activities benefiting both university and region by cultivating meaningful student learning experiences, growing civic engagement, developing first-rate arts and athletics facilities, and understanding regional impact through collaborative partnerships that honor community voice and expertise.

Grand Challenge 3, "Realizing the Potential of All our Students," coordinates academic affairs and student services efforts to address student success through systematic institutional alignment. This challenge supports comprehensive development by ensuring 100% student participation in High Impact Practices, developing a high-functioning student success ecosystem, and creating flexible credentials through coordinated support systems that eliminate opportunity gaps.

3. Evaluate the impact of the initiative, including any changes in processes, policies, technology, curricula, programs, student learning and success that are now in place in consequence of the initiative.

The transformative impact of Northern Michigan University's Quality Initiative extends across almost every dimension of institutional operations and has changed how the university plans, decides, and acts.

Process Transformation Through Collective Impact

A fundamental impact involved shifting from isolated, episodic planning efforts to coordinated, continuous institutional processes. Previously, strategic planning occurred in silos, with departments and initiatives operating independently, often duplicating efforts or working at cross purposes. Before this initiative, NMU collected backward-looking descriptions of various ad hoc projects and called this documentation "strategic planning," despite these disparate efforts lacking strategic coordination. The new approach creates interconnected processes where all planning efforts deliberately reinforce shared institutional goals in forward-looking ways.

The establishment of a common vocabulary through the Strategic Planning Glossary allows all stakeholders to speak the same language when discussing Tactics, Strategies, and Progress Metrics. This seemingly simple change had profound effects on institutional communication and coordination. Strategy Leads use standardized Action Plan templates that clearly articulate responsibilities, timelines, and success metrics, creating consistency across diverse initiatives.

The Strategic Doing methodology has introduced a new approach to group collaboration on strategic initiatives, creating dynamic, action-oriented teams that make progress through structured conversations and regular reviews alongside traditional structures. Strategic Doing training for 145 campus stakeholders has created a critical mass of facilitators for collaborative strategy development, with many strategy teams implementing components of the methodology in ongoing work. This shift toward more agile, collaborative approaches aligns with collective impact principles by fostering continuous communication and mutually reinforcing activities essential for coordinated change efforts.

Policy Revolution Enabling Collective Action

Policy changes and evolving institutional norms have created the structural framework for sustained collective impact in strategic planning. The most significant shift was to establish an executive sponsorship model with clear accountability for Grand Challenges, creating direct responsibility lines from the Board of Trustees through executive leadership to implementation teams. Strategy Leads reporting on progress to Executive Sponsors ensures strategic initiatives receive necessary support at the highest institutional levels.

Alignment with HLC accreditation requirements has also embedded quality improvement into regular institutional processes rather than treating it as separate compliance.

While strategic planning has not yet been fully integrated with resource allocation processes, this integration would ensure budgetary decisions align with strategic priorities, moving planning from wish-list exercises to resource-realistic implementation.

The Office of Institutional Effectiveness has adopted standard practices to incorporate student facilitators in planning and improvement efforts, alongside formalized feedback mechanisms. These practices embed inclusivity into the university’s listening, planning, and implementation processes, moving beyond ad hoc engagement to systematic stakeholder participation across all institutional initiatives.

Technology Infrastructure Supporting Collective Measurement

Technology enhancements have created the infrastructure necessary for shared measurement and continuous communication. The development of Tableau dashboards, using intuitive color-coding systems — green for on-track, yellow for cautionary, red for off-track, gray for discontinued — make complex strategic information accessible to all stakeholders. The public-facing nature of these dashboards creates a level of transparency and accountability that are new for NMU.

The investment in AI tools for qualitative data analysis has enabled us to process thousands of stakeholder comments efficiently while identifying key themes and patterns. This technological capability proved essential when analyzing over 5,000 comments from 1,200 participants across seven major engagement sessions throughout the academic year, including two large surveys, a community visioning dinner, board of trustees workshop, university assembly, and various strategy sessions with the university's executive council.

Curriculum and Program Evolution Through Coordinated Action

The initiative's impact on curriculum and programs demonstrates how the conditions of collective impact translate into academic transformation. The commitment to High Impact Practices with a goal of 100% student participation requires coordinated effort across all academic departments. This wasn't simply a mandate, but rather a collective commitment developed through inclusive planning processes. We are making measurable progress toward departments designing curricula with HIPs integration from the start rather than adding them as afterthoughts.

The 60-Year Curriculum (60YC) framework reimagines flexible credentialing by bridging traditional degree programs with non-credit learning experiences. Coordinated effort across Academic Affairs, Extended Learning, and external partners establishes Credit for Prior Learning databases, modularizes online courses, and develops wraparound support for adult learners. Integrated components — from continuing education partnerships to digital badging and the "60YC Fellows" faculty program — create seamless pathways recognizing both formal education and professional experience as valuable lifelong learning components.

Student Success Transformation Through Collective Commitment

Important impacts center on student learning and success, with the "100/Best/Zero" framework establishing ambitious goals through ambitious, coordinated action. The commitment to 100% HIPs participation seeks to provide every student the opportunity to engage in at least two high-impact educational practices. The goal of achieving the best four-year graduation rate among regional Carnegie peers drives systematic improvements across factors affecting student progress. Significantly, the commitment to zero opportunity gaps in graduation rates addresses equity directly through coordinated interventions.

The evolution of the student success ecosystem results in comprehensive transformation rather than piecemeal improvements. Enhanced advising systems, early alert mechanisms, peer mentoring, and integrated support services work together through careful coordination. This ecosystem approach exemplifies collective impact — multiple stakeholders are working toward shared goals through coordinated action and shared measurement.

4. Explain any tools, data or other information that resulted from the work of the initiative.

The work of the Quality Initiative produced a comprehensive suite of tools, frameworks, and resources that have improved how Northern Michigan University operationalizes strategic planning. These outputs provide both immediate value and long-term infrastructure for continuous improvement, and generate sustainable systems rather than temporary solutions.

Strategic Planning Glossary: Creating Common Language

The establishment of NMU's Strategic Planning Glossary in 2022 supports shared understanding across diverse stakeholder groups. This comprehensive document creates a linguistic framework enabling effective collaboration across institutional boundaries by defining critical terms including Focus Areas,

Strategies, Tactics, Key Performance Indicators, Progress Metrics, Executive Sponsors, Strategy Leads, and Action Plans.

The glossary addressed a fundamental challenge: previous planning efforts failed because different groups used identical terms with different meanings. Faculty might use "strategy" for pedagogical approaches while administrators meant multi-year institutional initiatives, creating miscommunication and frustration that prevented coordinated action. Clear, concise definitions with NMU examples eliminated this confusion.

Beyond definitions, the glossary establishes hierarchical relationships between planning elements, showing how Tactics support Strategies, which advance Focus Areas or Grand Challenges, which fulfill institutional mission and vision. The hierarchical structure enables sophisticated planning discussions and clearer accountability structures, allowing strategy teams to trace how proposed tactics support their strategy and contribute to broader Grand Challenges. The glossary continues evolving as planning sophistication grows; it is available at https://nmu.edu/institutionaleffectiveness/nmu-strategic-planning#spglossary.

Action Plans and Implementation Framework

The Action Plan framework (first introduced during the development of the Interim Strategic Plan in 2022) enables Strategy Leads to systematically articulate tactics with assigned responsibilities, creating clear accountability chains that define how strategies will be accomplished. Rather than isolated projects, the structure helps leaders coordinate tactics that collectively deliver strategic objectives. For example, Strategy 1.3's Opportunity and Empowerment Hub includes developing a database, piloting a program to enhance hiring practices, and establishing the BIPOC Outdoors Summit, each contributing to the overall strategic vision.

Progress Metrics localize measurement at the tactical level, monitoring project progression (what we do) while key performance indicators (what difference it makes), encouraging Strategy Leads to establish clear measures for both tactical and strategic impact through quantitative and qualitative indicators.

Public Dashboards: Transparency Through Technology

NMU's new Tableau dashboards transform strategic planning through intuitive visual displays accessible to all stakeholders. The multi-level architecture enables users to view high-level overviews or drill down to specific tactics and metrics. Strategy-level overviews show aggregate progress across all three Grand Challenges. Action plan-level dashboards provide Strategy Leads with detailed tactical progress, and public views ensure appropriate transparency while protecting sensitive information.

Student Facilitator Development and Deployment

The student facilitator training program creates sustainable, inclusive stakeholder engagement through comprehensive training in active listening, bias recognition, note-taking, and technology management. The adaptable program allows refinements while maintaining quality through standardized assessments, with micro-credentialing incentivizing participation through formal recognition.

Student facilitators effectively demonstrated these skills during Interim Plan engagement sessions in early 2022, at the Community Visioning Dinner in November 2023 where they guided stakeholder discussions using structured yet flexible formats balancing networking with focused conversations. *Our Compass* Campus Engagement Sessions in 2024 further showcased their capabilities using listening phase drafts to refine the strategic plan. Detailed templates supported facilitators, recognizing that logistical preparation significantly affects facilitation success.

Institutional Research and Decision Support Integration Framework

NMU recognized the critical need for sophisticated frameworks that integrate assessment data into strategic planning processes, connecting existing assessment streams with strategic initiatives so planning decisions build on evidence rather than assumptions. Through the work of this initiative, we have been exploring approaches and making connections, developing a comprehensive framework that maps assessment tools to strategic goals while identifying which existing instruments provide relevant data and where new assessment approaches are needed.

Early implementation demonstrates the framework's potential. National Survey of Student Engagement data now directly informs HIPs implementation strategies, with disaggregated results revealing which student populations engage less with high impact practices to guide targeted interventions. Data gathered from the Healthy Minds Study shape mental health services and campus efforts for wellbeing. Post-graduation outcomes projects provide data on experiential learning opportunities and post-graduation opportunities. Traditional institutional research data, including enrollment counts and retention and completion rates (including performance gaps for demographic breakdowns) now fulfill a role beyond reporting and provide diagnostic value as we measure strategy progress. Data from other departments, including Human Resources (employee retention and satisfaction) and our Sustainability Hub for Innovation and Environment (SHINE) STARS (Sustainability Tracking, Assessment & Rating System) ratings have a home in the framework as well.

The framework identifies optimal assessment timing to align with planning cycles, ensuring fresh data informs decisions, and establishes protocols for translating assessment findings into actionable insights. Future efforts will include collaborative interpretation sessions where data experts and practitioners jointly make meaning from results.

Strategic Doing: Implementation Infrastructure

NMU has invested in Strategic Doing as a core implementation tool, training 15 Strategic Doing practitioners and 145 campus and community members in this methodology that supports the university's partnership-based approach. The structured process moves groups from asset identification through prioritization commitment and accountability. The Institutional Effectiveness office can facilitate Strategic Doing workshops and provide this resource to campus units seeking to advance collaborative initiatives.

5. Describe the biggest challenges and opportunities encountered in implementing the initiative.

The implementation of Northern Michigan University's Quality Initiative revealed both significant challenges that have tested institutional resilience and remarkable opportunities that have accelerated transformation beyond initial expectations.

Opportunities: Catalyzing Long-Standing Initiatives

Strategic planning improvements have provided structure to address issues that had been percolating on campus for years without gaining traction. Sustainability initiatives exemplify this catalyzing effect. While NMU had passionate advocates, elevating this work in Our Compass has provided institutional structure, visibility, and coordination. The Carbon Neutrality Plan now has institution-level implementation timelines, accountability structures, dedicated resources, and progress tracking through strategic planning dashboards.

Similarly, wellbeing initiatives building across campus found new prominence and coordination through strategic planning. Adopting the Okanagan Charter provided theoretical grounding and international connection, while separate initiatives in counseling, health promotion, employee wellness, and academic

support coalesced into a comprehensive approach. The appointment of an Assistant Vice President for Wellbeing signaled institutional commitment, while strategic planning provided the framework for coordinated implementation.

Focus Area 2 of the Interim Strategic Plan coordinated previously scattered and unfocused activities. This work has now matured further, leading to the establishment of the Opportunity and Empowerment Hub. The hub demonstrates how NMU now centralizes access, opportunity, and empowerment for all students and employees, and strengthens our centralized commitment to evidence-based planning, collaboration, and communication on campus and across our communities.

Opportunities: Enhanced Collaboration

NMU's emphasis on continuous communication and mutually reinforcing activities created new collaboration across institutional boundaries. Faculty and staff who worked at NMU for decades reported never engaging substantively with colleagues from other divisions until serving together on strategy teams. Cross-functional connections generated innovative solutions no single unit could develop independently, such as the student success ecosystem emerging from collaboration between academic affairs, student services, enrollment management, and financial aid — units that traditionally operated in parallel.

Student facilitators created opportunities for multi-generational collaboration and fresh perspectives. Students bring questions and observations that productively challenge long-held assumptions while developing a new generation of leaders who understand strategy, planning, and institutional governance. Some student facilitators have brought their strategic planning skills to campus leadership roles.

Challenges: Sustaining Engagement From Planning to Doing

While initial strategic planning enthusiasm ran high, sustaining engagement through implementation proved challenging. The excitement of visioning and creating plans gave way to harder work addressing core systems, processes, and behaviors. Some strategy teams maintained momentum through strong leadership and early wins, while others struggled transitioning from planning to execution. The challenge is particularly acute in areas requiring behavioral change rather than new programs — embedding assessment thinking requires fundamental shifts in how faculty and staff approach work, not just new policies.

Competition for attention poses another engagement challenge. As planning excitement wanes, other institutional priorities compete for time and energy. Grant opportunities, accreditation requirements, enrollment challenges, and budget constraints demand attention from the same people leading strategic initiatives. NMU has learned to integrate strategic planning with other priorities rather than treating them separately, though this integration requires sophisticated coordination and communication.

Challenges: Resource Constraints and Strategic Ambitions

Balancing aspirational strategic goals with fiscal realities has created ongoing tension throughout the initiative. While leveraging existing resources through collaboration has been emphasized, many strategic initiatives require new investments that stretch institutional capacity. The expansion of the Institutional Effectiveness office, while essential for backbone support, requires reallocation from other areas. Training programs, technology infrastructure, and external facilitation all carry costs that must be balanced against other institutional needs.

However, creative resource strategies have emerged from these constraints. Strategic Doing's emphasis on identifying and leveraging existing assets helps teams discover previously unknown resources. Cross-

functional collaboration reveals duplicative efforts that can be combined for greater efficiency, while external partnerships bring new resources through shared initiatives. Though resource constraints remain real, they have sparked innovation in resource utilization that might not have emerged in a resource-rich environment.

Commitment to and Engagement in the Quality Initiative

6. Describe the individuals and groups involved at stages throughout the initiative and their perceptions of its worth and impact.

The success of Northern Michigan University's Quality Initiative has stemmed from broad cross-campus participation that has transformed strategic planning from an administrative exercise into a genuinely collaborative institutional effort engaging diverse stakeholders throughout the university community.

President Brock Tessman served as the ultimate champion, with his visible commitment and regular participation signaling this is a fundamental institutional priority rather than merely another administrative initiative. The distributed leadership model embodies Collective Impact principles through Executive Sponsors providing senior leadership for each Grand Challenge: Rhea Dever (Vice President for People, Culture, and Wellbeing) championing "Supporting our People," Gavin Leach (Vice President for Finance and Administration) leading "Partnering with our Place," and Dr. Anne Dahlman (Provost and Vice President for Academic Affairs) guiding "Realizing the Potential of All our Students."

The Institutional Effectiveness office, led by Assistant Provost and Director Jason Nicholas with Assistant Director Ellen Koski, provides essential backbone support, coordinating complex planning activities and maintaining communication flow and momentum across multiple concurrent initiatives.

The initiative has engaged over 1,500 individuals across all phases, including substantial student and community involvement. The Community Mission and Vision Survey garnered over 600 responses, while the Community Visioning Dinner brought together 65 key community leaders using trained student facilitators. Campus Engagement Sessions involved more than 130 participants across 11 sessions, deliberately structured to ensure representation from all employee groups and student populations.

Implementation maintains broad engagement through 11 Strategy Teams ranging from 7 to 20 members each, including faculty experts, staff practitioners, student representatives, and community partners. The 145 participants in Strategic Doing workshops learned collaborative techniques they now apply throughout the institution, creating ripple effects as these methods spread beyond strategic planning.

Evolving Perceptions of Worth and Impact

Early 2025 survey results revealed nuanced perceptions of the initiative's worth and impact. Positive themes emerged strongly, with respondents particularly valuing increased stakeholder engagement and an environment where input feels genuinely welcomed by leadership. Many noted this shift toward inclusivity as transformative for institutional culture, contrasting sharply with previous top-down planning approaches.

Participants consistently highlighted how collaboration on shared goals has strengthened planning culture, fostering greater community alignment and shared purpose. Several specifically mentioned that cross-functional strategy teams have built relationships that benefit their regular work. Breaking down silos emerged as an unexpected but highly valued outcome, with new collaborations spawning innovations beyond strategic planning itself.

However, perceptions were not uniformly positive, reflecting honest assessment of ongoing transformation. Some respondents reported seeing few tangible changes from the strategic plan, particularly in areas requiring cultural rather than programmatic change. This disconnect between planning and visible implementation remains a concern for maintaining long-term engagement, emphasizing the need to both connect strategic planning to substantive improvements and communicate connections between strategies and outcomes. Communication has emerged as both a success and a continuing challenge — while many praised improved transparency through dashboards and regular updates, others found information pathways unclear, particularly for those not directly involved in strategy teams.

Most significantly, strong consensus has emerged that the initiative's ultimate value depends on producing concrete, measurable outcomes and student-centered improvements. Stakeholders expressed patience with implementation timelines but clear expectations for results. This conditional support suggests that while participants appreciate the collaborative process and improved planning systems, they reserve full judgment pending evidence of institutional transformation.

7. Describe the most important points learned by those involved in the initiative.

The Quality Initiative has generated profound learning at individual and institutional levels, with insights extending beyond strategic planning to organizational change and collaboration fundamentals.

The most consistent learning involves recognizing communication as strategic planning's essential foundation, not an add-on. Communication must be genuinely multi-directional — creating authentic dialogue opportunities where all voices are heard and responded to, not just leadership broadcasting messages. The importance of audience-specific communication has become clear through trial and error, as one-size-fits-all messaging failed to meet diverse stakeholder needs.

Many participants have discovered the concrete value of involving diverse stakeholders throughout planning. This wasn't philosophical inclusion, but rather is practical recognition that better solutions emerge from diverse perspectives. Faculty have brought pedagogical expertise, staff have understood operational realities, students have highlighted user experiences, and community members have provided external context. Student facilitators taught powerful lessons about neutralizing power dynamics, creating spaces for more honest and creative dialogue.

Participants have learned to see connections between previously isolated efforts, developing appreciation for institutional complexity beyond individual departments. Strategy team members recognize that solving complex challenges requires coordinated effort across traditional boundaries. Systems thinking influences regular work, with some beginning to ask broader impact questions and seeking cross-functional collaboration outside strategic planning contexts.

Participants learned nuanced lessons about pacing institutional change, recognizing complex organizational transformation takes years, not months. They developed patience for long-term change while maintaining momentum. Strategic Doing's 30/30 cycles taught teams to make rapid progress on pathfinder projects while building toward larger goals, combining quick wins with long-term vision to sustain engagement through challenges.

Most profoundly, participants have learned that shared ownership transforms both strategic plan quality and implementation likelihood. When diverse stakeholders genuinely shape strategic direction, they bring better ideas and personal commitment to success. This ownership must be earned through authentic engagement and responsive leadership, transforming not just strategic planning but also institutional culture around collaboration and change.

Resource Provision

8. Explain the human, financial, physical and technological resources that supported the initiative.

Human Resources: Building Collective Capacity

Leadership commitment has included 17 Executive Council and 35 President's Leadership Council members who shifted significant meeting time to strategic planning oversight, while Strategy Team leaders have invested considerable coordination hours beyond regular duties. NMU created a new strategic planning assistant director for organizational and project management expertise. Student facilitators receive professional compensation ($3,600) and micro-credential training in facilitation, note-taking, bias awareness, and group dynamics. Ten campus representatives attended University of North Alabama's Lean Practitioner training to form a campus-wide Lean Community of Action for continuous improvement.

Financial Resources: Strategic Investment

Direct implementation costs totaled approximately $53,000: $10,000 for community engagement events, student facilitator compensation, and initial technology setup, plus $43,000 for Strategic Doing workshops and Rapid Improvement sessions facilitated by the University of North Alabama's Agile Strategy Lab.

Annual technology costs include Canvs AI insights platform ($10,000), Miro ($500), Mentimeter ($100), and Claude AI ($100), with Zoom and Qualtrics institutionally subsidized.

Recognizing that effective planning requires sustained support, university leadership established a $15,000 annual strategic planning budget, signaling institutional commitment to the new planning system and understanding that ongoing resources are essential for continued coordination and implementation.

Infrastructure: Technology and Physical Space

Virtual platforms have expanded participation while maintaining engagement quality through institutionally subsidized Zoom for campus-wide sessions. Interactive tools enhanced planning through Miro for collaborative brainstorming, Mentimeter for real-time polling, and Qualtrics for survey analytics revealing stakeholder perspective differences. Canvs has transformed unstructured feedback into actionable decisions through qualitative analysis at scale, while Claude AI supports analysis and coordination tasks. Physical space requires careful academic schedule coordination, with the Community Visioning Dinner designed to encourage authentic dialogue among diverse stakeholders.

Resource Coordination and Efficiency

The initiative has revealed that effective resource provision requires alignment over adequacy — synergistic combinations achieved outcomes no single resource could accomplish alone. The strategic planning process has identified previously hidden institutional assets, creating sharing mechanisms that have stretched available resources while building collaborative culture and demonstrating institutional values through action.

Plans for the Future (or Future Milestones of a Continuing Initiative)

9. Describe plans for ongoing work related to or as a result of the initiative.

The Quality Initiative's transformation of strategic planning established foundations for continuous improvement that extend far beyond the formal initiative period. Rather than concluding with the development of *Our Compass*, the systems, processes, and cultural changes detailed throughout this report now guide NMU's ongoing institutional advancement. Key areas of continued work, most of which have been discussed in previous sections as integral components of our evolved approach to strategic planning and collective impact, include:

Continuous Improvement Systems

- Regular Action Plan Updates: Structured reviews and check-ins throughout the academic year ensure strategies remain responsive to changing conditions, building on the strategy Action Plan framework already established.
- Consistent Campus Engagement: Regular opportunities to share accomplishments and listen to campus in order to maintain broad involvement beyond initial plan development, varying formats from traditional presentations to interactive fairs with student facilitator support.
- Expanding Community Partnerships: Extend engagement beyond campus boundaries and generate authentic dialogue between university and community members.
- Advanced Dashboard Analytics: Update dashboards to evolve from simple status tracking to sophisticated analytics showing trends, correlations, and predictive indicators.
- Strategic Funding Integration: SISU Innovation Funding creates financial mechanisms supporting strategic alignment through internal grants prioritizing *Our Compass* progression.

Cultural and Systematic Enhancements

- Expand Use of Student Facilitators: Employ student facilitators within university initiatives beyond strategic planning, including academic program reviews, campus climate assessments, and faculty search processes.
- Predictive Planning Analytics: Integrate internal data with external trends to anticipate rather than react to change.
- Peer Institution Networks: Extend NMU's application of collective impact through peer institution collaboration and strategy sharing.
- Measuring Community Engagement: Develop systems to assess relationship quality and mutual benefit with partners.

Lasting Cultural Transformation

- Inclusive Decision-Making Expectation: Stakeholders now expect meaningful engagement approaches for all institutional decisions, not just strategic planning.
- Evidence-Based Improvement Culture: Established appetite for data-informed institutional advancement that extends beyond formal planning cycles

10. Describe any practices or artifacts from the initiative that other institutions might find meaningful or useful and please indicate if you would be willing to share this information.

Publications and Presentations

Northern Michigan University has actively shared its strategic planning experiences with the higher education community through multiple channels:

Published Article: "Quickly Building a Bridge: Use an Institutional Effectiveness Planning Model to Drive Strategic Planning" was published in SCUP's *Planning for Higher Education* journal (V51N3 April–June

2023), detailing NMU's rapid development of an interim strategic plan through innovative engagement processes.

NMU was selected to present at two Society for College and University Planning (SCUP) Annual Conferences:

- "Cross-Pollination Planning for Institutional Effectiveness" (July 2023) - demonstrated how Institutional Effectiveness competencies enhance strategic planning engagement and implementation
- "Strategic Doing at Northern Michigan University" (July 2024) - presented on Strategic Doing, and shared the methodology's application at the university and early outcomes

Professional Development Training

NMU delivered a member-exclusive SCUP webinar titled "Innovative Approaches to Implementing your Strategic Plan: The Power of Strategic Doing" which covered applying Strategic Doing methodology to organize cross-functional teams, enhancing collaboration and accountability, and driving strategic plan implementation. The webinar included case studies of NMU's approach and practical applications for other institutions facing similar implementation challenges.

Our team remains committed to supporting peer institutions in their own transformation efforts. For additional information, specific materials, or consultation opportunities, contact the Office of Institutional Effectiveness at Northern Michigan University at ie@nmu.edu or visit www.nmu.edu/ie.