

2015-2020 MACUHO Strategic Plan



MACUHO

Mid-Atlantic Association of College & University Housing Officers

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## The Task Force

### **Advisors**

Brooke Clayton	President	Lehigh University
Brian Medina	President-Elect/Vice President	Frostburg State University
Crystal Lopez	Past President	Caldwell College

### **Chairs**

Joshua Belice	Director of Strategic Initiatives	University of Maryland, Baltimore County
Michael Schoch	Strategic Planning Coordinator	Lebanon Valley College

### **Members**

Nicole Clemson	Taskforce Member	Wilkes University
Susanne Ferrin	Taskforce Member	University of the Sciences
Nicholas McConnell	Taskforce Member	York College
Carolyn Pitcairn	Taskforce Member	Gannon University
Lynn Riker	Taskforce Member	New Jersey Institute of Technology
Dana Severance	Taskforce Member	Frostburg State University
Michael Taberski	Taskforce Member	Mount. St. Mary's University
John Verdi	Taskforce Member	Gwynedd Mercy University
Kurtis Watkins	Taskforce Member	Steven's Institute of Technology
Stewart Robinette	Taskforce Member	Drew University

## **MACUHO Mission Statement**

The purpose of the Mid-Atlantic Association of College and University Housing Officers (MACUHO) is to serve our members through opportunities for professional development and education, networking and interaction, and access to research and current trend information. Association activities and decisions are based on the principles of inclusion, collaboration, involvement from a diverse population of practitioners, and mentoring of current and future colleagues.

## **Strategic Plan Philosophy**

MACUHO's 2015-2020 Strategic-Plan consists of four critical issues; **Finances, Networking, Outreach, and Research**. These four critical issues will drive the future work that have been outlined in the goals and objectives appropriately provided by the various committees and partners within MACUHO. (See goals and objectives below.)

Additionally, it was determined that technology and assessment, two consistent variables, should be addressed amongst each critical issue. As the Association evolves, technology will serve two important functions:

- A catalyst for transparency
- A method for communication

Technology provides the Association with the opportunity to be more intentional when sharing efforts, maintains accountability to the organizational mission, and allows for effective communication with regard to events, initiatives, and updates. Furthermore, technology will allow us to effectively and efficiently communicate with essential parties, such as vendors & exhibitors, ACUHO-I and its affiliate members, and any professionals interested in MACUHO's membership.

Assessment conducted within each of the four critical issues allows the Association to make data-driven decisions. It is important for MACUHO to use quantitative and qualitative research to identify strengths, areas for improvement, and opportunities for expansion.

MACUHO believes that by addressing these four critical issues while incorporating technology and assessment, the organization will be able to improve the field of housing and residence life.

## **Strategic Planning Timeline**

June 2013 - A SWOT (Strengths, Weaknesses, Opportunities, & Threats) analysis was conducted from survey results gathered over the last four years. The results from the MACUHO Annual Survey and Annual Conference Survey were analyzed to determine overarching themes and trends.

February 2014 - Goal setting session was conducted during the Winter Executive Board Meeting with Executive Board and Leadership Council members to independently confirm similar or differing themes and trends. Results indicated critical issues and implications for the future including recommendations.

June 2014 - Director of Strategic Initiatives and Strategic Planning Coordinator presented five critical issues to the Association at the Summer Summit.

November 2014 - Executive Officers recommended a timeline extension for the 2014-2019 Strategic Plan. Doing so allowed for finalization of the active 2009-2014 Strategic Plan, while continuing to research critical issues and objectives for the new 2015-2020 plan. Issues would be researched through means an appointed Strategic Plan Task Force.

December 2014 - An Strategic Plan Task Force member application accessible on the MACUHO website was made available to any housing and residence life professional in the MACUHO region. All active members were emailed to complete the application if interested.

February 2015 – Forty-seven (47) applications were received and reviewed at the Winter Executive Board Meeting. From these applications, a thirteen person task force was selected and appointed by the Presidency, Director of Strategic Initiatives, and Strategic Planning Coordinator.

March 2015 - Task Force applicants were notified regarding their application status.

April-May 2015 – Appointed Task Force members worked with MACUHO Executive Board and Leadership Council members to explore the critical issues.

June 2015 - The Task Force met at the 2015 Summer Summit and finalized their efforts. Task Force members established four concise critical issues and developed measurable goals and objectives. Post meeting, the Director for-Strategic Initiatives and Strategic Planning Coordinator initiated the first draft of the 2015-2020 Strategic Plan.

July 2015 - The 2015-2020 Strategic Plan draft was sent to the Strategic Plan Task Force and to the Executive Board for initial review.

September 2015 - The 2015-2020 Strategic Plan was made available on the MACUHO website.

October 2015 – The Executive Board presented the 2015-2020 Strategic Plan at the MACUHO Annual Conference Business Meeting for a membership vote.

## **Determining the Initial Critical Issues of the Strategic Plan**

In June of 2013, the Strategic Planning Coordinator interviewed each of the committees and working groups within MACUHO's formal structure asking for the strengths, weaknesses, opportunities, and threats (SWOT), as it related to their responsibilities. With the Director of Strategic Initiatives, the results were compiled and presented to the Executive Board and Leadership Council. As an association, MACUHO's Leadership Council and Executive Board picked the top five critical issues in each category as a basis for which to base the SWOT analysis. From there, the Strategic Planning Coordinator developed seventeen qualitative and quantitative statements to confirm the basis for the new critical issues. These critical issues were then presented at the 2014 Summer Summit confirmed by the Executive Board and Leadership Council. While at the 2014 Summer Summit, leadership members suggested an evaluation of the 2009-2014 Strategic Plan be conducted to see if the goals and objectives of the current strategic plan had been met. In September, 2014, the Strategic Planning Coordinator drafted the extension plan for the 2014-2019-Strategic Plan in order to facilitate a more consummate and transparent process for developing the new 2015-2020 Strategic Plan.

## **Creating the Strategic Plan Task Force**

During the 2014 MACUHO Annual Conference Business Meeting, the Strategic Planning Coordinator recommended the establishment of a task force in order to research and develop the 2015-2020 Strategic Plan. After approval from the Presidency, an application was created and available on the MACUHO website. Additionally, all active members were e-mailed the application. Forty-seven applications were completed by members all over the region and with all levels of experience (i.e. Past Presidents, Chief Housing Officers (CHOs), Mid-level professionals, Entry-level professionals, and Graduate students). From this diverse pool of interested applicants, eleven task force members were selected during the 2015 Winter Executive Board Meeting. In order to best represent the organization, the selection breakdown consisted of two Past Presidents, three Chief Housing Officers (CHOs), two Mid-level professionals, three Entry-level professionals, and one Graduate student. The Task Force was chaired by the Strategic Planning Coordinator and the Director for Strategic Initiatives (whom also served as members on the Task Force). The Executive Board supervised the selection process, as well as, the implementation process.

## Scope of Research

*MACUHO operates with 7 content areas:*

- Annual Programming & Events
- Diversity, Equity, & Inclusion
- Housing Assignments and Facilities Operations
- Personal and Professional Development
- Recognition, Education, and Connections
- Recruitment and Retention
- Membership Development

Task Force members were paired together and worked with individual committees in order to explore the original five critical issues that evolved from the 2014 MACUHO Summer Summit. One Task Force member served as the liaison to the Executive Board to explore these issues. The five original critical issues were identified as: *Active Membership, Governance & Culture, Finances, Technology, and Assessment*.

Throughout an eight week period (April-May 2015) Task Force members contacted their respective committees and inquired about the critical issues. From these conversations, goals and objectives were developed. Research and documentation was gathered and maintained by the Strategic Planning Coordinator.

During the 2015 Summer Summit, the Task Force met to review their work. As a result, the language originally endorsed during the 2014 Summer Summit, was revised to encompass more inclusive terminology. From that, the 2015-2020 Strategic Plan was constructed around four critical issues: **Finances, Networking, Outreach, and Research**. Notwithstanding, it was determined that technology and assessment, two original critical issues, would be woven into these four comprising critical issues. All of the goals and objectives for the final four critical issues were reviewed and revised accordingly.

After the 2015 Summer Summit, the Strategic Planning Coordinator and Director of Strategic Initiatives reviewed all of the changes and additions while creating the framework and initial draft of the 2015-2020 Strategic Plan. The initial draft was sent to the Executive Board and to the Task Force for a final review. Once feedback was reviewed, the 2015-2020 Strategic Plan was released on MACUHO website for membership review. Questions, clarifications, and corrections from the membership were answered and adjustments were made.

The Executive Board presented the final draft of the 2015-2020 Strategic Plan at the MACUHO Annual Conference Business Meeting.

## Critical Issue 1: Finances

Goal 1.1	MACUHO will ensure fiscal responsibility through sustainable stewardship.	Objectives	
Objective 1.1.1	Offer transparency with the budget and financial decisions.	<ol style="list-style-type: none"> <li>1. Post timely information about finances on the website.</li> <li>2. Publicize and highlight how to find information about finances and financial information for and about MACUHO.</li> <li>3. Modify the language/vernacular used to explain the budget.</li> <li>4. Assess whether current fiscal cycle is the best for the Association's current needs.</li> </ol>	Executive Board
Objective 1.1.2	Explore the effects of ACUHO-I's Strategic Plan Affiliate Agreement on MACUHO's finances.	<ol style="list-style-type: none"> <li>1. Evaluate gain/loss of Corporate Partner and Sponsors based on any changes with ACUHO-I's affiliation agreement.</li> <li>2. Assess gain/loss of independent programs or other specialized events.</li> <li>3. Implement a plan to maintain communication during decision making, monetary exchanges, and other agreement changes.</li> <li>4. Speak and maintain open dialog with other affiliate regions about agreement with ACUHO-I.</li> <li>5. Review to balance of MACUHO's financial support of ACUHO-I specialized programs vs. ACUHO-I's support of MACUHO's specialized programs (i.e. STARS, VIPS, NHTI, etc.).</li> </ol>	Executive Board
1.1.3	Allocate unused funds to increase capital reserve.	<ol style="list-style-type: none"> <li>1. Research if a financial planner/advisor should be procured.</li> <li>2. Increase revenue for the short, medium, and long term goals.</li> <li>3. Develop a plan that accounts for inflation from fixed expenditures.</li> <li>4. Benchmark capital appreciation goals against the other regional affiliates and ACUHO-I.</li> </ol>	Executive Board

Objective 1.1.4	Continue to retain and recruit new Corporate Partners/Sponsors for financial stability.	<ol style="list-style-type: none"> <li>1. Assess the number of Corporate Partners/Sponsors recruited and retained each year.</li> <li>2. Track fluctuation of Corporate Sponsorships year to year. Identify consistent donors and items sponsored.</li> <li>3. Evaluate the level of satisfaction of Corporate Partners/Sponsors.</li> <li>4. Identify what adds or detracts from Corporate Partner satisfaction.</li> <li>5. Benchmark regional and ACUHO-I sponsors.</li> <li>6. Identify best practice recruiting cycle/timeline for Corporate Partners/Sponsors.</li> <li>7. Design better way to track and build relationships with Corporate Partners/Sponsorships.</li> <li>8. Engage sponsors to increase cost effectiveness of programmatic initiatives.</li> <li>9. Identify and implement best practices of showing appreciation towards Corporate Partner/Sponsors.</li> </ol>	Sponsorship Coordinator; Treasurer; Director of Business Operations
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## Critical Issue 2: Networking

Goal 2.1	MACUHO will foster opportunities for professional growth and development through diversity.	Objectives	
Objective 2.1.1	Expand attention of MACUHO membership on issues related to gender or gender-based issues.	<ol style="list-style-type: none"> <li>1. Use technology to solicit/produce publications focusing on gender issues and gender-based violence.</li> </ol>	Diversity Committee
Objective 2.1.2	Expand attention of MACUHO membership on issues facing LGBTQIA community.	<ol style="list-style-type: none"> <li>1. Use technology to solicit/produce publications focusing on LGBTQIA students and staff.</li> </ol>	Diversity Committee

Objective 2.1.3	Create new opportunities and incentives beyond the Annual Conference for networking around diversity topics.	1. Develop and implement at least one new annual event (e.g. Diversity Day).	Diversity Committee
<b>Goal 2.2</b>	<b>MACUHO will foster opportunities for professional growth and development through interactive membership.</b>	<b>Objectives</b>	
Objective 2.2.1	Engage each level of professional within MACUHO.	<ol style="list-style-type: none"> <li>1. Differentiate networking needs between graduate students, new professionals, mid-level, and CHOs.</li> <li>2. Outline and plan ways to engage members based on networking needs.</li> <li>3. Within 5 years, implement one new networking opportunity to each level of professionals.</li> <li>4. Create/maintain an open VIPS Facebook account so past, current, and future VIPS can effectively communicate.</li> </ol>	Personal & Professional Development Committee; Recruitment & Retention; Regional Coordinators; Social Media Coordinator
Objective 2.2.2	Increase collaboration between MACUHO committees.	1. Create initiatives to maximize collaboration across committees.	Executive Board; All Committees
Objective 2.2.3	Provide Corporate Partners/Sponsors more opportunities to connect with the organization and its members.	<ol style="list-style-type: none"> <li>1. Assess the gain, loss, or change of Corporate Partners membership.</li> <li>2. Assess what leads to companies becoming Corporate Partners and the level they choose (i.e. more ads, more events attended, booth selection, etc.).</li> <li>3. Better define the differences between the various levels of the Corporate Partnership Program versus being a Corporate Sponsor.</li> <li>4. Explore whether MACUHO budgetary decisions should be shared with Corporate Partners.</li> <li>5. Provide opportunities conducive to conversations between members and</li> </ol>	Executive Board; Sponsorship Coordinator; Director of Annual Programs; Director of Business Operations and Communication; Exhibits & Displays Chair

		<p>Corporate Partners.</p> <ol style="list-style-type: none"> <li>6. Include Exhibitor/Vendor receptions at additional conferences/events.</li> <li>7. Create specific events that help new professionals learn the art and importance of mingling with Corporate Partners and/or Exhibitors.</li> <li>8. Benchmark against other industries and affiliate regions for best practices when developing/expanding these relationships and partnerships.</li> </ol>	
Objective 2.2.4	Improve investment of committee members.	<ol style="list-style-type: none"> <li>1. At least 75% of Committee members will report being satisfied with their level of committee engagement.</li> </ol>	All Committees

### Critical Issue 3: Outreach

Goal 3.1	MACUHO will maximize efforts to recruit and retain new organization members.	Objectives	
Objective 3.1.1	Focus outreach to students/staff from HBCUs, community/junior colleges, and Latino-serving institutions.	<ol style="list-style-type: none"> <li>1. Engage HBCUs, community/junior colleges, and Latino-serving institutions that are not currently affiliated with MACUHO.</li> <li>2. Solicit/Produce publications focused on HBCUs, Junior/Community Colleges, and/or Latino-serving institutions.</li> </ol>	Diversity Committee; Personal & Professional Development Committee; Recruitment & Retention; Regional Coordinators; MACUHO Magazine
Objective 3.1.2	Utilize currently active mid-level professionals and CHOs to engage new professionals within the region.	<ol style="list-style-type: none"> <li>1. Create timeline of outreach to new professionals within the region (June/July and December/January, new professionals; July/August, new grads) to facilitate outreach to institutions within the region.</li> <li>2. Create means and/or events for mid-level professionals and CHOs to utilize for</li> </ol>	Personal & Professional Development Committee; Regional Coordinators

		reaching out to non-members.	
<b>Goal 3.2</b>	<b>MACUHO will maximize efforts to recruit and retain members by way of technology.</b>	<b>Objectives</b>	
Objective 3.2.1	Create a communication channel (listserv) for housing and operations personnel.	<ol style="list-style-type: none"> <li>1. Create a listserv serving members interested and/or working with facilities, assignments, and business operations.</li> <li>2. Advertise listserv at the Annual Conference, as well as, to those housing professionals who are unable to attend.</li> </ol>	Housing & Facilities Operations Committee
Objective 3.2.2	Create and maintain ongoing webinar series.	<ol style="list-style-type: none"> <li>1. Utilize Top 10 Program recipients from Annual Conference as presentations for webinar series.</li> <li>2. Share relevant webinars from outside sources.</li> <li>3. Engage CHOs through presenting webinars and developing CHO specific webinar topics.</li> </ol>	Personal & Professional Development Committee
Objective 3.2.3	Improve electronic communication.	<ol style="list-style-type: none"> <li>1. Effectively utilize social media and the MACUHO Magazine to communicate with members regarding upcoming initiatives and events.</li> <li>2. Maintain updated information on MACUHO website, including committee meeting minutes, upcoming programs, important dates, etc.</li> <li>3. Utilize the MACUHO website storage location for specific members to access archived collection of documents in facilitation of program planning and achievement of committee and MACUHO goals.</li> <li>4. Post conference presentations online for those who cannot attend programs and/or those who want to review presentation materials.</li> </ol>	All Committees

Objective 3.2.4	Supply presentation feedback to all presenters (SSLI, Annual Conference, Webinars, etc.) to encourage their personal and professional development.	<ol style="list-style-type: none"> <li>1. Create standard assessment materials to be utilized across all committees.</li> <li>2. Research and review online or digital options for presenter feedback/evaluation forms.</li> </ol>	Director of Annual Programs; Program Committee; Personal & Professional Development Committee; Regional Coordinator; Recognition, Education, & Connections
Objective 3.2.5	Enhance the technological interface that Corporate Partners/Sponsors partake with the membership.	<ol style="list-style-type: none"> <li>1. Assess the technological needs and wants of the Corporate Partners/Sponsors.</li> <li>2. Benchmark other regional associations and ACUHO-I's use of technology with Corporate Sponsors.</li> </ol>	Sponsorship Coordinator
<b>Goal 3.3</b>	<b>MACUHO will maximize efforts to recruit and retain members.</b>	<b>Objectives</b>	
Objective 3.3.1	Increase VIPS membership.	<ol style="list-style-type: none"> <li>1. Increase and sustain VIPS membership to 20 members by the year 2020.</li> <li>2. Track and maintain database of past VIPS attendees.</li> </ol>	Recruitment & Retention
Objective 3.3.2	Assess the survey methods/questions for each annual MACUHO event (Annual Conference & Exposition, Student Staff/Live-In Conference (SSLI), Mid-Atlantic Placement Conference (MAPC), and Regional Entry Leadership Institute (RELI)).	<u>Year- Item:</u> <ul style="list-style-type: none"> <li>• 2015- SSLI</li> <li>• 2016- MAPC Candidates</li> <li>• 2017- MAPC Employer</li> <li>• 2018- Annual Conference &amp; Exposition</li> <li>• 2019- RELI</li> </ul>	Director of Annual Programs; Director of Strategic Initiatives; Strategic Planning Coordinator
Objective	Update assessment	<u>Year- Item:</u>	Director of

3.3.3	methods and questions for each item.	<ul style="list-style-type: none"> <li>• 2016- SSLI</li> <li>• 2017- MAPC Candidates</li> <li>• 2018- MAPC Employer</li> <li>• 2019-Annual Conference &amp; Exposition</li> <li>• 2020- RELI</li> </ul>	Annual Programs; Director of Strategic Initiatives; Strategic Planning Coordinator
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## Critical Issue 4: Research

Goal 4.1	MACUHO will use research to initiate data-driven change for the Annual Conference & Exposition.	Objectives	
Objective 4.1.1	Research ways to improve the quantity and quality of program proposals for the Annual Conference as it relates to Housing & Facilities Operations.	1. By 2020, one-quarter of all accepted program proposals will be Housing & Facilities Operations related.	Director of Annual Programs; Program Committee
Objective 4.1.2	Analyze the cost related to keynote speakers and special guests.	1. Benchmark keynote and special guest expenses with other regional associations.	Director of Annual Programs; Program Committee; Treasurer
Objective 4.1.3	Analyze the cost to host related to price of attendance of MACUHO events/conferences.	1. Benchmark price point with other regional associations.	Director of Annual Programs; Host Committees; Treasurer
Goal 4.2	MACUHO will initiate research to create operational change through data driven decisions.	Objectives	

Objective 4.2.1	Create a task force to develop a Financial Advisory Board.	<ol style="list-style-type: none"> <li>1. Identify the association’s financial experts.</li> <li>2. Develop a Financial Advisory Board based from these identities.</li> <li>3. Decide whether all or some of these Board members should sit on the Executive Board with a rotation and how long they should serve in this capacity.</li> <li>4. Create a digital manual of requirements, expectations, responsibilities, and scope of executive decisions for Advisory Board Members.</li> </ol>	Executive Board
Objective 4.2.2	Increase the amount of small drive-in, local conferences and summits.	<ol style="list-style-type: none"> <li>1. Hold two smaller events each a year in addition to the Annual Conference &amp; Exposition specifically for housing &amp; facility operations professionals.</li> <li>5. Create a “how-to” guide to assist delegates interested in hosting small events. This guide would include a budget request form and assistance in marketing the events.</li> </ol>	Housing & Facilities Operations Committee; Programming Committee; Director of Annual Programs; Director of Membership Development
Objective 4.2.3	Expand programming (outside of the Annual Conference) and publications related to housing, facilities, and operations.	<ol style="list-style-type: none"> <li>1. Create an opportunity or environment to share knowledge about repurposing buildings, financing, and maximizing revenue.</li> <li>2. Develop a series of roundtables or webinars on hall occupancy fluctuation.</li> <li>3. Survey institutions to find which have reduced pricing or initiated discount programs.</li> <li>4. Provide opportunities that will help to teach institutions ways to market living on campus and the value-added to the college experience.</li> </ol>	Housing & Facilities Operations Committee
Objective 4.2.4	Encourage presentations on evolving diversity topics that also provide insight in terms of housing facilities and operations and not just residential education.	<ol style="list-style-type: none"> <li>1. Program Committee, Housing &amp; Facilities Operations Committee, and the Diversity Committee partner to provide opportunities for sessions on housing operations topics of interest that fit the following categories or other “hot” topics: <ul style="list-style-type: none"> <li>• Gender neutral housing/LGBTQ community</li> <li>• Disability access</li> </ul> </li> </ol>	Housing & Facilities Operations Committee; Program Committee; Diversity Committee

		<ul style="list-style-type: none"> <li>• Emotional support animals</li> <li>• Fair Housing Act</li> </ul>	
<b>Goal 4.3</b>	<b>MACUHO will initiate research to create increased membership and/or participation through data driven decisions.</b>	<b>Objectives</b>	
Objective 4.3.1	Explore Chief Housing Officer (CHO) involvement.	<ol style="list-style-type: none"> <li>1. Identify the current CHO involvement in MACUHO.</li> <li>2. Assess how long and why CHOs maintain an active membership.</li> <li>3. Assess what leads CHOs to get involved in other professional organizations/associations.</li> <li>4. Assess where and why CHOs feel that MACUHO is or is not a priority for their own professional development.</li> </ol>	Executive Board
Objective 4.3.2	Explore the impact the MACUHO Magazine has on recruiting and retaining membership.	<ol style="list-style-type: none"> <li>1. Assess percentage and variance of active readers.</li> <li>2. Identify what parts current members value in the magazine.</li> <li>3. Benchmark how other regions use their magazine/newsletter.</li> <li>4. Develop a digital repository to help the visual design of the magazine.</li> <li>5. Assess impact that the magazine has on members attending conferences, drive-ins, and other events.</li> <li>6. Assess the effect that printed ads in the magazine as an enticement for the various levels for Corporate Partners.</li> <li>7. Assess cost of the magazine against the revenue generated from Corporate Partner advertisements.</li> <li>8. Survey Corporate Partners on how best to be served via printed/digital mediums.</li> </ol>	Magazine Editor; Regional Coordinators; Sponsorship Coordinator; Director of Business Operations and Communications

Objective 4.3.3	Increase active committee participation by reaching out to new organization members.	<ol style="list-style-type: none"> <li>1. Create sub-committee structure to increase engagement of new members seeking active participation.</li> <li>2. Create guide for members in navigating professional development plan to advance engagement in MACUHO.</li> </ol>	Executive Board; All Committees
Objective 4.3.4	Explore ways to recruit and involve graduate students.	<ol style="list-style-type: none"> <li>1. Create a subcommittee dedicated to working with graduate students and on how to get involved with MACUHO.</li> <li>2. Develop a graduate internship program to assist with MACUHO events similar to the VIPS program.</li> <li>3. Create an ongoing database of current and recent graduates to help increase long term membership.</li> </ol>	Recruitment & Retention Committee