

CLARK UNIVERSITY

Strategic Planning Caucus Toolkit



CAUCUS [*kaw'kuhs*]: n. any group or meeting organized to further a specific interest or cause; v. to hold or meet in a caucus; or to bring up or hold for discussion in a caucus

This **Strategic Framework Caucus Toolkit** is designed to allow members of the Clark community to create specific fora for generating more **focused** ideas for advancement through the strategic framework vetting process. As a next-level phase of engagement after the broader, community-wide visioning processes, caucusing will be one way that members of the community may seek to engage the community around specific focused ideas and areas of interest that cut across traditional institutional boundaries. *While this will not be the only way to engage in a process to develop ideas for consideration by the strategic planning steering committee*, it is one strategy that could help to generate ideas around a particular issue, theme, or topic that is community-driven and which seeks to support broader community engagement.

Community members interested in hosting a caucus on a topic of interest to them may use this toolkit to get started. We recommend that the caucuses take place via Zoom, allowing members of the community to register to attend.

While this document is designed to facilitate a collaborative process that engages many people, anyone can propose an idea for strategic planning.

SELECT A TOPIC OF FOCUS

- Identifies an area of potential opportunity and growth for the university as a whole
- Engages one or more areas of the Fithian Five Areas of Focus:
 - ✓ **Academic Programs:** Foster excellence by leveraging traditional strengths, encouraging innovation, and finding synergistic opportunities to develop across departments and programs; build on Clark’s distinctive model of a small research university combined with a liberal arts college. High-level, cross-cutting concepts already emerging from the [Academic Units at Clark 2020](#) document include:
 - a. Research innovation, capacity, and infrastructure
 - b. Interdisciplinary innovation, capacity, and infrastructure
 - c. Diversity, Equity, Access and Inclusion in Academic Programs, Research and Instruction
 - ✓ **Campus Environment:** Enhance Clark’s physical plant to inspire and enable the best work of faculty, students, and staff. Achieve greater sustainability. Explore new building materials and systems.
 - ✓ **Culture and Identity:** Ensure an inclusive and equitable environment to support our diverse community, allowing everyone to thrive; bolster identity with a values-driven approach; promote a “culture of possibility,” encouraging risk-taking to improve our standing in the competitive landscape.
 - ✓ **Outward Engagement:** Amplify the Clark story beyond traditional audiences; exercise convening power; bring renewed focus to our international efforts; deepen ties to the Main South community and Worcester. Be the national research university we are evaluated to be.
 - ✓ **Institutional Capacity:** Recruit, retain, and cultivate talent; attract and drive resources toward impact; build strength through strategic partnerships; catalyze momentum.

ENGAGE THE BROADER CLARK COMMUNITY

You and your colleagues should decide how broadly you want to engage members of the community. You may have already organized a small working group or you may be in the very beginning stages of idea development and are looking for partners to explore ideas. Whichever stage you are at in the ideation phase, you can choose to organize a caucus. Here are some possible questions to consider and points of contact for different modes of engagement:

- Who will be the primary convener(s) for your caucus?
- Who would you like to be involved (Staff? Faculty? Students?)
- Support for advertising your caucus on listservs
 - ✓ All faculty and staff: future@clarku.edu
 - ✓ Faculty (full time and part time): [Amy Lee](#) (Provost)
 - ✓ Students (undergraduate and graduate): [Danielle Acosta](#) (Dean of Students)
- Support for advertising the caucus on the strategic planning website
 - ✓ Point of Contact: [Robert McLaughlin](#) (Planning and Finance)
- Support for advertising a “call for engagement” in the Academic Affairs update, the HR Newsletter, and on ClarkNow
 - ✓ Point of Contact for Academic Affairs Update: [Aviva Luttrell](#) (MarComm)
 - ✓ Point of Contact for HR Newsletter: [Melissa Lynch](#) (MarComm)
 - ✓ Point of Contact for ClarkNow: [Jim Keogh](#) (MarComm)
- Support for social media teasing/promotion of caucuses:
 - ✓ Point of Contact: [Danielle Strandson](#) (MarComm)

PLAN THE EVENT(S)

- Community member-led; we recommend a small group of two to three people to plan the logistics
- Some support with communications/advertising to broader community from the Strategic Planning Steering Committee
- Tips for success:
 - ✓ Cast a broad net for maximum inclusion
 - ✓ Conduct via Zoom, and require registration
 - ✓ Create a registration form that allows people to express interest; it will allow you to keep tabs on people to possibly engage in other ways if they cannot attend the Zoom caucus event(s)
 - ✓ Have a small planning team to help organize and plan the event
 - ✓ Include sufficient time for breakout conversations if the group is sizeable
 - ✓ Have a clear agenda and set clear goals for the outcome of the event

CAPTURE OUTCOMES

While we are flexible about the ways in which ideas may be presented to the Strategic Planning Steering Committee, we encourage you to use [this online form](#). However you choose to present your ideas to the committee, we ask that you answer the following questions.

- What is the name or title of the concept? Provide a brief overview/description.
- Who has been involved with your idea development process?
- What areas of the university will this idea strengthen, and how? Which Strategic Area of Focus might it contribute to?
- How many members of the community do you anticipate will be supported and/or impacted by this idea?
- Which members of the community do you anticipate will be supported and/or impacted by this idea?
- What currently exists (offices, staff, space, etc.) that may support or challenge implementation of this idea?
- What does not currently exist, but would need to be in place, to support implementation of this idea?
- Do you have a sense of short-term goals, mid-term goals, and long-range goals that would build toward implementation of this idea?

ENGAGE THE STRATEGIC FRAMEWORK STEERING COMMITTEE

Once you have developed an idea to whatever degree you feel comfortable sharing, [submit your idea here](#). Your submission will be forwarded to the Strategic Framework Steering Committee, who will evaluate it as described [here](#).