



# Strategic Plan – First Draft Briefing Note

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For discussion purposes

## CONTEXT

The first draft of Okanagan College's next strategic plan can be found here. The sections below describe how the language in the First Draft is connected to the themes found during the first round of engagement sessions held in May and June.

One thing you may notice missing is a "strategic roadmap." This is the section of the plan that outlines how we will convert the "what are we going to do?" sections of the plan to the "how and when are we doing to do it?" This roadmap is an important tool for everyone to see how their contributions are integral to the success of Okanagan College's strategy and when the College will undertake certain projects and initiatives. The roadmap helps create this understanding. It is missing because the strategic roadmap needs to be guided by the strategy. Therefore, the roadmap will be created once further refinements are made to the strategy itself.

The first draft of the plan has six parts:

1. Our story. This section is intended to set the stage for the strategic plan. It is intended to describe a little about the College and the context in which it finds itself.
2. Mission. This is the statement that defines why the College exists.
3. Vision. This is a statement for what the College aspires to.
4. Core Values. Our core values are those words that describe our culture and guide our decisions, behaviors, and interactions.
5. Cultural Foundations. This section is unique to this strategic plan and signifies those things that we want to be core to our culture but have not yet reached that status and require meaningful attention to get there.
6. Strategic Directions. This section describes those things that will differentiate us as a college.

## EXPLANATORY SECTIONS

### PART 1 - OUR STORY

The creation of "Our Story" is to create a backdrop or context about how the strategic plan fits into our journey. It seeks to honor the past and set the context of how we will build our future together.

### PART 2 - MISSION – WHY WE EXIST AS A COLLEGE

The proposed Mission statement remains pretty much the same from previous plans with one exception. "Okanagan College" has been replaced by "We" at the beginning of the mission statement. The change to "we" at the beginning was introduced to invite every member of the Okanagan College community to see themselves in the mission and make it an active statement in their own work and personal lives.

### PART 3 - VISION – WHAT WE ASPIRE TO AS A COLLEGE

The proposed Vision is a new addition to college planning. Although it is not a required element of a plan, there is opportunity to capture the intended spirit of the strategic plan through a vision statement.

The themes found during the engagement sessions were used to craft the vision. Themes included the role of the College in social matters (e.g., social justice, EDI), the region's economic climate (e.g., meaningful employment and meeting needs of community), our environmental context (e.g., sustainability), and community cultural context (e.g., reconciliation). The idea of inspiring and empowering is based on the college's community leadership role and the idea that it is our learners that transform communities directly. The focus on future generations is a link to sustainability and Indigenous world views.

### PART 4 - CORE VALUES – THESE GUIDE OUR DECISIONS, OUR BEHAVIORS, AND OUR INTERACTIONS

The core values have been adapted from prior plans to align with the themes found during engagement sessions. There are six core values identified through engagement. In some cases, the core values from past plans have been carried forward, adapted or reconfigured, or moved to a different part of the planning document. The goal was to keep the number of core values to a number that everyone would find memorable.

### PART 5 - CULTURAL FOUNDATIONS – THOSE VALUES TO WHICH OKANAGAN COLLEGE IS STEADFASTLY COMMITTED. THESE FOUNDATIONS REQUIRE ONGOING AND PURPOSEFUL ATTENTION AND ACTION FOR THEM TO BECOME CORE TO THE COLLEGE'S CULTURE.

The cultural foundations section has been added to describe things that the Okanagan College community would like to see as part of our core values or culture in the future. Currently we recognize that they are still somewhat aspirational and require purposeful actions and resources before they can become core values or cultural artifacts.

Cultural Foundations are not considered to be strategic directions as they are not differentiating factors. For example, by focusing on JEDI, we are not differentiating ourselves from others.

They do, however, serve as a direction to which time, resources, and effort must be given. Without dedicated efforts, they are unlikely to become core to the College's culture.

The first two Cultural Foundations (i.e., Indigenous Okanagan College as well as Justice, Equity, Diversity, and Inclusion) are key themes from the engagement sessions and are legacy elements from prior plans. The sophistication of each area has been strengthened because of the progress made by the College since they were last described in 2016. Both initiatives are already underway at Okanagan College and will be announced in the fall, thereby proceeding the launch of the strategic plan.

Sustainability is an adaptation of a core value outlined in the Toward 2020 plan. While the College has made efforts toward sustainability being part of our culture, by having it included in the cultural foundations section, we will direct resources toward it specifically. Sustainability includes environmental and economic aspects. The focus of environmental sustainability is on carbon reductions. The economic sustainability is focused on a) revenue diversification (which people spoke about as affordability during engagement sessions) and b) alignment between goals and resource allocations (which people spoke about as under-resourcing during engagement sessions).

As you may note, human resources have been separated from sustainability and included as a cultural foundation of its own. The idea of a strong employee base emerged from engagement sessions related to the need to look after the wholistic wellbeing of the individual employees. By including it in the foundations section, it enables the College to direct specific resources toward achieving it.

The cultural foundation of being efficient and effective has been included to capture the themes related to internal frustration with policies, practices, and workflow as well as embracing technology in what we do. By focusing on scalability, we have attempted to move away from an operational checkpoint to a more strategic cultural foundation.

## **PART 6 - STRATEGIC FOCUS – AREAS OF DIFFERENTIATION FROM OTHER INSTITUTIONS**

Three key strategic directions emerged through the engagement sessions. These directions are presented as those things that can differentiate us from other institutions. While at first glance, the first two strategic directions may appear to be consistent with what other institutions do, it is in the depth of the strategy that these two strategies differentiate. Namely, to fully embrace both Inclusive and Equitable Access and Personalized and Wholistic Lifelong Learning Partnerships, fundamental and extensive changes would be required to the College's policies, practices, and approaches.

### **STRATEGIC DIRECTION #1 – Inclusive and Equitable Access**

The focus of this strategy is on creating equitable opportunity for non-traditional and equity-seeking student populations to access and succeed at Okanagan College by addressing systemic bias (whether unconscious or unconsidered). It is grounded in the transformational power of higher education in creating personal agency for individuals who may otherwise not have the opportunity to attend. This theme was present in the engagement sessions through a focus on Indigenous learners in community, rural and remote learners, learners who have technology limitations, learners who have work or family commitments, learners with financial limitations, and learners returning to the college later in life.

When realized, this strategy could bridge barriers such as:

- Geography by bringing the learning experience to the learner as compared to making the learner travel to the institution to learn
- Work and family commitments by creating learning opportunities that work around people's schedules as compared to the student needing to adjust their family/work commitments to meet the College's schedule, and
- Financial limitations by creating mechanisms for those who cannot afford education to participate.

These barriers represent only a handful of the barriers faced by non-traditional and equity-deserving groups.

The College is proud of its current access mandate and has built a reputation for being an accessible institution. This proposed strategic direction would amplify this mandate significantly. It would reinforce the theme found during engagement sessions regarding the need to be even more connected to our communities and their needs. It would reinforce the proposed cultural foundation of justice, equity, diversity, and inclusion by supporting a reputation built on access, quality, and abundance.

For context, an alternative strategy would be to focus on access through scarcity and elitism. In this alternative approach, the College would create barriers (e.g., high entrance requirements and limited capacity in high demand programs) to create the impression of quality.

The access-based strategy is not without challenges or risks. On the surface, it seems somewhat contrary to the third strategic direction of integration and focus. Although there is a tension created between the two strategies related to resource allocations, the focus on inclusive and equitable access is complementary to a strategy of focus. Access is based on the College's capacity to admit students. The focus strategy addresses what those students will learn and do once part of our student body.

The College will also have a natural capacity limit in its physical space. As access increases, so too will the pressures on the College's physical infrastructure. While this risk can be mitigated through the effective use of technology, it cannot be removed entirely.

This leads to a significant strategic question related to the bounds and/or limits of our growth. Today, Okanagan College is a mid-sized regional college. We serve a geographic space that extends beyond any one city or town but does not extend beyond the region. Although we do not have a provincial, national, or international mandate, we do attract students to our regional learning environment from elsewhere. Like other strategic questions, the question of focusing on our region or stretching beyond it is not a simple dichotomy, but rather a spectrum.

At one end of the spectrum, we could reinforce and strengthen our regional boundaries and focus on improving our market saturation in the geographic region we currently serve. Our efforts would be aimed at increasing the percentage of people in our region that attend Okanagan College. In this scenario, our long-term maximum number of students is limited only by the number of people in the region who could be students. This scenario is quite aligned to the inclusive and equitable access strategic focus because it focuses our attention on a specific region. In this scenario, the number of students from other parts of Canada or Internationally would be complementary to the regional student body.

At the other end of the spectrum, we could purposefully expand our geographic boundaries and focus on developing student markets from other regions provincially, nationally, and internationally. Our efforts would be aimed at increasing the percentage of students from other regions. In this scenario, our long-term maximum number of students is limited by the size/capacity of our physical space and digital offerings. From this perspective, the College could grow to be much larger than in the first scenario. In this scenario, the number of students from other parts of Canada and Internationally would be significant. While this approach seems somewhat contrary to the inclusive and equitable access strategy, growth in student numbers from other parts of the world may enable the College to invest further resources in local access initiatives.

## **STRATEGIC DIRECTION #2 – Personalized Lifelong Learning Partnerships.**

The second direction seeks to capture the idea of amplifying success of students by accounting for the wholistic wellbeing of the student and simultaneously recognizing that we are in an age of consumerism in which people are expecting a more personalized and individualized experience regardless of the context in which they are in. This direction also seeks to capture the idea of learning throughout life.

At first blush this strategy may appear to be consistent with the "student centric" narrative used by institutions almost universally. Institutions across North America have doubled down on their narrative over many years. What was once "student-focused" progressed to "student centric" and other variations of the terminology. What is unfortunate in this shifting narrative, is that with few exceptions, institutions have only changed the words they use, but have not changed their practices. To be effective, this strategy cannot be a simple paper exercise, but rather needs to result in true meaningful change for the student. This takes courage, as many college systems and procedures are in place to make the College's job easier, not the students'. Beyond making sure that the various wrap around supports are in place to enable wholistic student care, this strategy implies that the College will need to renew its practices and procedures to be student enabling first and college enabling second.

This strategy is consistent with the engagement theme regarding our need to focus on the wholistic student experience including mental wellbeing, supporting Indigenous learners, and supporting International learners more robustly. This strategy is also consistent with the growing expectations of learners across North America. The College will need to ensure we are creating value for the learner in all that we do and as a result needs to be heavily reliant on data.

With a focus on learning throughout life, the strategy is consistent with the idea of taking pride in our program offerings into and of themselves. That is, beyond creating pathways for learners into University pathways, it creates a public reputation of having programs that enable a student to start at Okanagan College, finish at Okanagan College, and return to Okanagan College for future learning experiences.

Among the risks associated with this strategy is that the financial implication of supporting a wholistic student experience is significant. Increased costs are typically not covered through government grants or regulated tuition increases, thereby placing greater strain on the financial health of the institution.

### **STRATEGIC DIRECTION #3 – Integration & Focus**

The final strategic direction is the idea of creating integration and focus. During the engagement sessions, there was an emergent theme of need to create and/or refine our identity. In essence, “who are we, and who do we exist for?” Stated differently, “what are we known for?” In some cases, this theme was described in questioning our name (i.e., college vs. university vs. polytech). In other cases, this theme was described through the desire for focus on further micro credentials through degree offerings (i.e., linear pathway through discipline). A third lens to this theme was heard in the shared impression of under resourcing of initiatives, programs, and activities at the College. Stated differently, we are spread too thin. By focusing on those areas in which we can have the greatest impact, the College is provided with a mechanism to prioritize goals and resources in a different way. Moreover, by focusing on those areas of challenge or opportunity in the community, the College can leverage the interdisciplinary possibilities across the College.

Underpinning this strategy are two operational continuums.

The first is one of “comprehensiveness” versus “focused.” In a comprehensive environment, an institution seeks to create learning opportunities across a broad (or comprehensive) spectrum of disciplines. In a focused environment, the institution directs greater resources at specific or flagship domains. This is like comparing UBC (comprehensive) to Emily Carr University (focused).

The comprehensive versus focused question is not a dichotomy, but rather a spectrum. At one end, we tend to see numerous topics that are organized by discipline (i.e., faculties), each with a relatively limited depth of credential offerings (e.g., diploma, degree, masters). At the other end, we see as low as a single discipline with greater depth in credential offerings (e.g., short courses, micro credentials, certificates, diplomas, degrees, post-degree offerings, continuing studies, etc.).

During our engagement sessions, people spoke to the desire for greater comprehensiveness (e.g., a desire for a fine arts area) and an even stronger push for greater focus and more depth (e.g., micro-credentials and more degrees in disciplines we already have and in new areas that are directly related to local challenges and opportunities).

For many institutions, their position on the comprehensive versus focus spectrum is defined by their mandate. For institutions in the middle – like Okanagan College, the balance is much harder to achieve without a higher-level decision parameter. The strategic direction of integration and focus provides that secondary lens. For example, prioritization of new program development in either a completely new area

(adding to our comprehensiveness) or in an area we already provide (adding to our focus) would be guided by the most immediate need of the communities we serve, the College's capability to deliver the program, and where we can create the greatest good for the communities.

The second operational continuum relates to whether the College serves as an entry pathway to University studies (e.g., a feeder institution) versus a learning experience into and of itself (e.g., an institution in which a student starts, finishes, and returns). Today, Okanagan College is a mixture of both. Like the question of comprehensiveness and focus, the question of pathways versus finishing is also a spectrum.

During our engagement sessions, we heard voices related to our role as a pathway institution (e.g., the role of our diploma programs in Arts as well as Science). At the same time, there appeared to be a stronger theme emerging toward being an institution that offered programs that were an end into and of themselves (e.g., creating distinct diploma programs that are aligned to market needs in Arts and Sciences).

Consistent with the comprehensive/focused continuum, the pathway/completion continuum is difficult for institutions like Okanagan College who are in the middle without a higher-level decision parameter. Again, the strategic direction of integration and focus provides that secondary lens. Using new program development as the example again, the College would prioritize new 1- or 2-year programs to be an entry pathway to universities versus a complete program based on the immediate need of the communities we serve, the College's capability to deliver the program, and where we can create the greatest good for the communities.

Without a secondary lens like the proposed strategic direction of integration and focus, these two operational continuums tend to be unwieldy and personal as program prioritization decisions can become rooted in individual's interests, current instructional capacity of the College, assumed program demand, and persistence of different stakeholder groups.