



Office of Education Outreach

Strategic Assessment



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Background

UW Tacoma has engaged the services of Potential Unleashed Consulting to conduct a strategic assessment that identifies challenges and opportunities for the office of Education Outreach. Selection and scheduling interviews of University of Washington Tacoma faculty, administrators, and staff was provided by the Office of the Chancellor. Those interviewed included Education Outreach staff members, campus unit stakeholders and faculty. The questions outlined below were emailed ahead of time, and we focused our time on gathering feedback to make recommendations about the purpose and structure of the unit. This assessment will provide insight on the perception of prospects of the unit for a sustainable future, including its strategy, its organizational structure and function, and its leadership.

In April 2021, we began the discovery interview process – a series of individual and group meetings to discuss and examine the Office of Education Outreach. Our intention was to understand how the office has functioned in the past, and how stakeholders envision it functioning in the future. This included discussing the current culture of the department and campus of University of Washington Tacoma. During the meetings, we began by sharing the purpose of the meeting and our role in the process as stated above in the opening sentence.

To gain context, the following research was provided by the Office of the Chancellor:

- Unit documentation including annual reports and client feedback where applicable
- Campus and unit organizational structures
- Information on UW Continuum College
- Scope and structure of Education Outreach units at similar universities

We asked participants to share their reflections on the following questions:

- 1: What do you see as the purpose of the unit?
- 2: What do you believe the Tacoma community sees as the purpose of the unit?
- 3: What do you see as the structure of the unit?
- 4: What do you believe the Tacoma community sees as the structure of the unit?
- 5: Do you have any recommendations for changes to the purpose/structure?
- 6: What does a sustainable future look like for you? Please describe in as much detail through the following lenses.

Strategy: In your opinion what would be an ideal strategy to create a sustainable future?

Organizational Structure: What would the organizational structure need to look like? Any recommendations?

Organizational Function: What would the organizational function need to look like? Any recommendations?

Leadership: What would ideal leadership look like?

7: Where do you see any SWOT (Strengths, Weaknesses, Opportunities, Threats)?

8: Do you have any short-term recommendations on interim leadership and goals for the unit?

A total of 17 individuals participated in individual and/or group interviews. While each person spoke, we took detailed notes and then looked for themes and patterns.

Responses

The following is a list of the top responses that emerged from the meetings. We considered a pattern any sentiment or idea that repeated at least once (had two or more occurrences); much of what follows repeated two, three or more times. We also felt it important to list all responses that seemed significant, even if it was only mentioned by 1 participant.

Question #1: What do you see as the purpose of the unit?

(The following is paraphrased interview feedback)

- Provide life-long learning for people outside of the university degree programs.
- Provide additional opportunities in the South Sound.
- Education Outreach is first point of contact; answering questions about UW Tacoma
- To provide external community the opportunity to host conferences/events with event professionals
- Seems to work as a consultant model – charge for every interaction
- Two orphan units coming together
- “UWT beyond the degree”
- Curricular oversight is the responsibility of the faculty, not Education Outreach
- The work/purpose of Education Outreach is seen as “managerial” not “academic”
- “The experience is like walking into the Ritz Hotel”

- Serves as function of sharing expertise with and for internal units
- An open door to community members looking for a way to connect to UW Tacoma; playing an ambassador role

Question #2: What do you believe the Tacoma community sees as the purpose of the unit?

**Note* A staff member asked how community was defined, which lead to separate discussions about the internal campus community, the external Tacoma and South Puget Sound community, and the University of Washington community.*

(The following is paraphrased interview feedback)

- The community doesn’t understand the purpose of UW Tacoma, let alone the units
- (Tacoma Community and Internal UW Tacoma Campus Partners) Contract with businesses and organizations to train employees
- (Tacoma Community) Providing conference venues
- (Internal Campus Partners) Provide beta testing for programs (internally and externally to campus)
- (External Community) People don’t know about Education Outreach, but are looking for knowledge and then indirectly learn about Education Outreach

- (Internal Community)
 - (Conference Services) – We must pay for space. Not sure they fully understand mission/goals of Education Outreach
 - (Professional Development Center) Understand continuing education is provided
- “We did a walking tour in 2015 and was never touted by the Chancellor”
- External Community
 - Provide interest that serves the community
 - Serve as a base to connect campus and provide a gathering space
 - Aligned to both subsections of the unit
 - Create awareness of the university / visibility of unit / connection to community

Question #3: What do you see as the structure of the unit?

(The following is paraphrased interview feedback)

- 2 different departments thrown together - connected through the outreach component
- Vision of perception: 2 separate units under 1 umbrella not knowing how to help
- “We are siloed”
- Tied together by being revenue generating
- Career Services utilized as a resource for students (network of employers for both Professional Development Center/Conference Services)
- It should be expanded
- Other stakeholders: The following is a list of campus entities mentioned as stakeholders who should also have interview time to assist with the discussion, planning and strategizing about the future of Education Outreach.
 - School of Education
 - Social Work & Criminal Justice
 - Interdisciplinary Arts & Science
 - Healthcare Leadership
 - Urban Studies
 - Community Partnerships
 - Alumni
 - Career Services
- Conference Services – internal conflict on operations with community on and off campus
- “Shell game going on”
 - “Schools get charged for bureaucracy, not value”
 - “Schools are charged for using the brand”
 - “Education Outreach is trying to recoup funds”
 - “Feels like dealing with a cellphone company”
 - “We pay for everything”
 - “No additional value at business level”
 - “Who owns what market?”
 - “Target demographics serve no one, creating competition”

- “Charging for conversations”
- “Business model needs to change”
- “We (schools) own the curriculum expertise”
- Opportunities to work more closely together and lay some foundational work
- Education Outreach doesn’t have a clear path – no road map created (Next Executive Director should help with this)
- “Blow the whole thing up and start over”
- Should consider being an enterprise services unit: minus housing
 - Copy shop / Transportation / Conference Services. / Education Outreach / Convenience Store
 - All under one person
 - Looking at new revenue generation
 - Understand community and support that balances the business and relationships
 - Staffing talent exists on campus – no need for any new hires
- Being the “prospector” – looking for opportunities to partner on campus and in the community
- (As an enterprise) “People who know hospitality, know hospitality”

Question #4: What do you believe the Tacoma community sees as the structure of the unit?

**Note* A staff member asked how community was defined, which lead to separate discussions about the internal campus community, the external Tacoma and South Puget Sound community, and the University of Washington community.*

(The following is paraphrased interview feedback)

- (External)
 - Expanding education to the community / providing support for these endeavors
 - Professional Development Center: Providing content and expertise for community/businesses needs
- (Internal)
 - Partnering with the UW Tacoma schools
- No knowledge of structure

Question #5: Do you have any recommendations for changes to the purpose/structure?

(The following is paraphrased interview feedback)

- Focus on continuing education
- Fee-based programs: Should they all be here in Education Outreach?
- Take core services (conference services) and decentralize the rest
- Identify where we see ourselves aligning and where we have similarities/differences
- Define the purpose of the unit (clear cut & defined)
- Co-location of teams on campus allowing the ability to see faces and build relationships

- Clarify structure: Business model, leadership, purpose
- “Would it be better to have Education Outreach in Milgard? “
- Are Professional Development Center/Conference Services the right fit for one another?
Do “we” make sense?

Question #6: What does a sustainable future look like for you? Please describe in as much detail.

(The following is paraphrased interview feedback)

- Not competing with each other; we just have different markets (credit/non-credit)
- Relevant, easy access, meeting needs/interests of audience
- Offer hybrid-only continuing education
- Embrace the virtual space by providing virtual conferences
- Provide service where units are coming to them to generate diversity in programming for academic units
- How does the university qualify faculty in Education Outreach?
 - Become an academic unit (8th academic unit under academic affairs)
 - Hire own faculty → Only teaching faculty
 - Dean of academic unit → Only if Education Outreach is a school
 - School of Education Outreach → Education program under EVCAA
 - Academic unit only non-matriculated
- What is sustainable? Must be defined (i.e. revenue, impact to community, impact to environment, equity)
- Investment in Education Outreach (support from the beginning) – stop bootstrapping and add University buy-in and support
- Have a strategic partnership where unit can truly brand programs
- People being valued and doing work that they love
- Leader believes in the work and has the tools to help us get there
- Provide a safe space for them (staff) to learn and give viewpoints
- Needs to start with defining what and who Education Outreach is
- Externally people need to know who and what we are
- Build from the bottom w/ clear instructions and guidance
- Regularly can meet our purpose and financial needs
- Fully support all positions on reliable basis
- Contribute money back to university
- Have a concrete 1, 3, 5-year plan
- Services are available at reasonable cost to internal colleagues
 - “They’re (Education Outreach) driving away the people (schools) who can bring business their way.”
- Consistently forging new relationships
- Exploring entrepreneurial opportunities
- Some elements are sustained by institution, and some self-sustaining by the unit

Strategy: In your opinion what would be an ideal strategy to create a sustainable future?

- Educate people on the potential of Education Outreach to build trust in the unit so people don't try to work around it.
- Do away with the mixed messaging: "We're all one" & "You need to pay for the resources"
- "Don't go after 20 different things with a small thing" – Focus on 2-3 core goals and do them well
- Follow a strategy to maximize income. Be precise in the certificates and degree programs offered in first 5 years (i.e. stackable programs/degrees)

Organizational Structure: What would the organizational structure need look like? Any recommendations?

- Manager/Staff for service units, and let us (schools) do our own thing
- Education Outreach should be a trimmed-down group
- Reduce staff/overhead to \$100K – reallocate staff to units
- Co-location on campus, work happens organically/naturally
 - Relationships fostered on non-work events (i.e. birthdays)
 - Team-building
 - To be thought of other than "furniture people"
- Structure which allows our roles to do the jobs we're supposed to be doing

Organizational Function: What would the organizational function need to look like? Any recommendations?

- Stop providing unwanted service (to schools)
- Education Outreach should provide programs beyond the interest of the school
- Education Outreach should do their own programming/training and generate their own revenue
- Have a CRM / Higher tech = Higher ROI
- Stop charging for every conversation before ever having a program

Leadership: What would ideal leadership look like?

- Leader talking to the community about their needs
- Leader facilitates conversation between academics and community
- Navigate the current climate and listen to students
- Go out and find industry leaders teaching the courses (non-credit bearing)
- Needs to be in community actively working with mayor and community partners with support of other leaders
- Have a hospitality background
- Creating a 2-year vision/strategy with check-ins/benchmarks to track growth
- The clear goal must come from the new leader. It must come from the top.
- We need focus

- Someone who has a background in what we do
- Have our back – know what we’re fighting for

Question #7: Where do you see any SWOT?

(The following is paraphrased interview feedback)

Strengths

- Strong faculty/brand of Schools
- Knows executive education
- Talented faculty who are well-known in their fields of research
- Conference Services: Exceptional customer service
- Conference Services. wants Professional Development Center to be successful, and vice versa
- Good, hard-working teams that believe in what they’re doing
- Corporate Partners

Weaknesses

- There is no strategy/vision for Education Outreach
- One-size-fits-all model doesn’t work
- Forcing units to use services erodes collegiality
- Limited space on campus
- Low-standing on campus (disrespected, off to the side, “not an academic unit”)
- Scarcity mindset on campus w/ partners
- Territorialism which gets in the way of UW Tacoma
- Strategy undermines relationships: Education Outreach not seen as strategic partners on campus
- Dealing with change of leadership (lots of stress/anxiety)
- Not a good relationship between Education Outreach and schools (Milgard)
- Leadership transition is extensive

Opportunities

- Virtual ability to serve markets far away. Lots of employees want to increase their training.
- Education Outreach leader can connect with UW Continuum leader to know how they plan and strategize
- Providing executive education in South Sound
- Professional Development Center helps with content / Conference Services. helps with venues → One-stop shop
- Building relationships with community - Lots of opportunity to work with internal and external parties
- Offering opportunity to companies to diversify their leadership utilizing the UW Tacoma diverse population

- Opportunity to be a catalyst to bring centers/units together as strategic partners
- New chancellor / EVC

Threats

- Internal competition among professional and academic stakeholders
- External competition is very tight for South Sound. Market is very small
- Other event spaces in area
- Community college offering baccalaureates
- New chancellor / EVC

Question #8: Do you have any short-term recommendations on interim leadership and goals for the unit?

(the following is paraphrased interview feedback)

- Leadership must understand marketplace, finances and how the unit works
- Leadership should communicate and connect with Seattle Career Office
- Current leadership is Senior level. It should be at a “Junior” level (Associate Dean/Manager or Senior Academic). Director level leadership is “reasonable”
- Should integrate “collaboration” and “collegiality” because staff is young and new
- Should straddle the academic & business communities
- Communicator/Facilitator of groups of people
- Ability to positively explain vision and strategy
- Be visionary and innovative
- Solidify what we’re doing now, and identify how to be an urban-serving entity
- Remove bureaucracy and unnecessary steps
- One person from each team (i.e. Chelsea & Chris) to oversee unit on interim basis

Consultant Recommendations

After careful consideration we propose the following recommendations:

- Short-term recommendations:
 - Interim leadership:
 - There is an immediate need to designate the leader(s) of the unit in preparation of Lisa Reeves' departure this summer. In its current form, each team (Conference Services & Professional Development Center) of the unit would benefit from having representation as co-interim directors. This would serve as an opportunity to continue fostering the campus and community relationships already established, while also allowing time to continue engaging other Education Outreach campus stakeholders outlined in this assessment who were not interviewed.
 - If the decision was to promote internally from one of the two Education Outreach teams, we do not believe it would create more internal/external friction or fractures amongst the staff members. Our recommendation would be to work with the interim leader to clearly articulate what the next 6-9 months would consist of for both teams, and what is expected regarding internal/external collaborations.
 - We would recommend opening a full search for the next Executive Director of Educational Outreach (if it is decided to keep the same or similar organizational structure).
 - Goals for the unit
 - Considering the upcoming transition of leadership at the Education Outreach Director, EVCAA and Chancellor levels, a recommended goal would be to utilize this time to engage the other campus stakeholders who were not interviewed during this assessment to solicit their thoughts/feedback on working with Education Outreach. This would serve as foundational information for the incoming leadership.
 - Identify and provide intentional team-building time for the internal Education Outreach staff to strengthen and build upon the current positive collegiality within the team. We believe it would be highly beneficial to stack some emotional "bonds and wins" which could prove useful to collectively assist each other through the leadership transition process.
 - With the Spring 2021 term coming to an end, it may prove useful to also hold a few "Summer Drips" serving as a series of days/times over the summer months where both internal and external communities can come

together to have coffee and discuss Education Outreach in a semi-social environment. These could be facilitated or non-facilitated events.

- Utilize the feedback gathered from the internal/external community engagements to assist in conducting a strategic planning process.
- Establish Web Presence: There is currently no presence of Education Outreach on the University of Washington Tacoma webpage other than the current staff directory page (<https://directory.tacoma.uw.edu/department/educational-outreach>), even though both Conference Services and Professional Development Center websites exist. Below are a few examples of how Education Outreach's work is represented on other campuses.

- UW Professional & Continuing Education:
<https://www.pce.uw.edu/>
- UCSB Professional and Community Education Program:
<https://professional.ucsb.edu>
- IUP Adult and Community Education:
<https://www.iup.edu/ace/about/>

- Longer-term recommendations and considerations

- Strategic Positioning:

- It would be in the best interest of executive leadership, and all stakeholders involved with Education Outreach, to determine exactly what role best fits for not only the unit, but for UW Tacoma and the overall mission of the university.

- Structure:

- Having a clearly articulated mission and goal of the Education Outreach unit would help guide how the unit should be structured. There are a variety of internal and external community stakeholders, all with different goals/agendas, along with the lack of a clearly articulated structure and function of the unit for internal staff, which only leads to continual confusion, stress, and tension.

- Leadership of the Unit:

- Campus and community-wide support, acknowledgement, and marketing of Education Outreach should be seen, felt and heard from the Office of the Chancellor and the UW Tacoma campus leadership, to outline and assist with clear articulation of the mission, purpose and structure Education Outreach will serve for all campus stakeholders.

