

**NISTS 2023**

# BE A CONNECTOR FOR TRANSFER STUDENT SUCCESS

Virtual • February 1-3 | Portland, OR • February 22-24

The following presentation was given at the 21st Annual Conference for the National Institute for the Study of Transfer Students. Please cite responsibly and direct questions to the original presenter(s).

*Educational Session*

## **2824 - Get Unstuck and SOAR into Your Next Transfer Project**

Leadership and Strategic Planning, Partnerships and Collaboration

Got a new transfer project or an issue to tackle but feel a little lost on how to make progress? Use the SOAR technique, as well as some other strategic planning tips and collegial collaboration, to bring your ideas closer to reality. This interactive session will help attendees clarify their ideas and focus on making a strong case for necessary transfer improvements. Bring one of your challenges or great ideas to work on!

**Michael Rosenberg**, *Senior Policy Analyst*  
Penn State Institutional Research

SOAR into Your  
Next Transfer  
Project!  
Get Unstuck  
and Get  
Aspirational.

**Michael J. Rosenberg, Ed.D.**

Senior Policy Analyst, Penn State University

February 22, 2023

NISTS 2023, Portland OR

# The Circle of Transfer Frustration



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# The reality

- We work with smart, passionate people.
- Smart, passionate people have good ideas.
- Limited time and resources.

Situating your work strategically improves your odds of success.



# Today's agenda

- A quick word on strategic planning
- An Introduction to SOAR
- SOARing as colleagues
- Next steps



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# What is strategic planning?

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- “A formal process designed to help an organization identify and maintain an optimal alignment with the most important elements of its environment.” (Dolence, Rowley, & Lujan 1997)


Translated as:

“Where do we want to go as an institution?”

“How are we going to get there?”



Why care  
about  
strategic  
planning?

- 
- **Broaden awareness of transfer needs, issues, and realities!**
  - Performance-driven environment
  - Learning how the institution works.
  - Networking and participating in the priority-setting process.

Consider your challenge or project.

# Your Institution's Strategic Plan

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- Know where to find it.
- Mission & Vision
- Core Principles/Foundations
- KPIs/Metrics
- **Connect your Transfer work (and your students' experience!) with the language of the plan.**



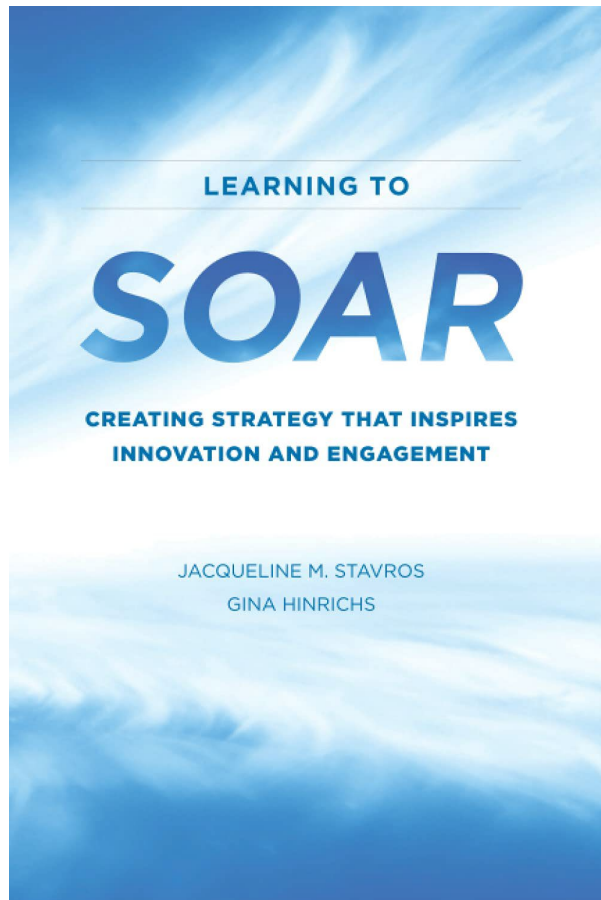


# Introduction to SOAR



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Stavros, J. M., & Hinrichs, G. (2021). *Learning to SOAR: Creating Strategy that Inspires Innovation and Engagement*. The SOAR Institute.



## What is SOAR?

- Positive frame for strategic conversations.
- Based on Appreciative Inquiry.
- Applicable to almost any organization or setting.
- Derails cynicism.

# SWOT Analysis

- **S**trengths – Assess our capabilities.
- **W**eaknesses – Where we lack strength, resources, or momentum.
- **O**pportunities –The unfilled needs or trends.
- **T**hreats – External circumstances that hinder progress and growth.

Focuses on:                      Diagnosis and analysis, Risk mitigation,  
Gap identification, Obstacles to progress



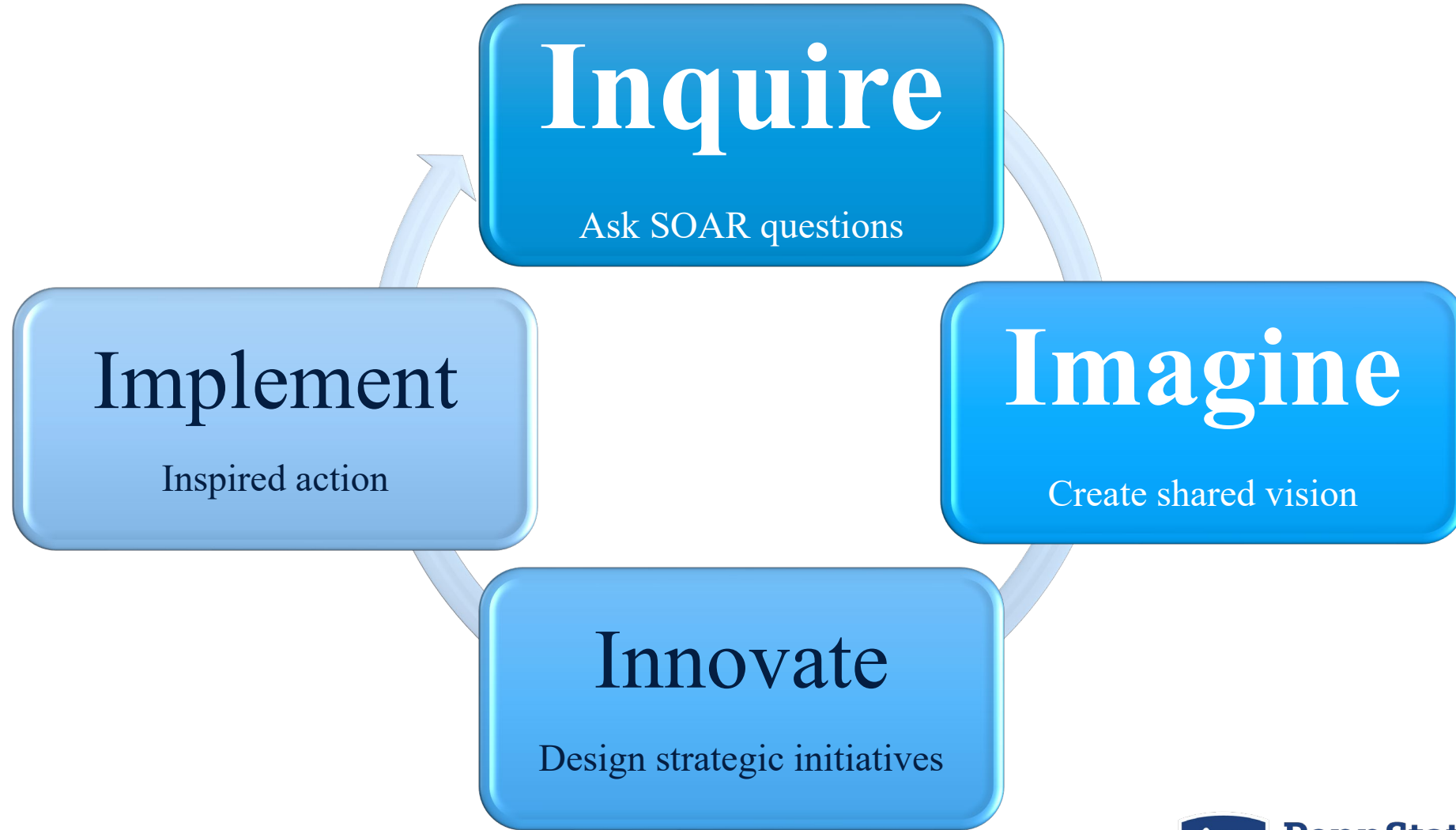
# SOAR Planning

- **S**trengths – What are we great at?
- **O**pportunities – What are the possibilities?
- **A**spirations – What do we want to be?
- **R**esults – What are meaningful outcomes?

Focuses on:                      Leveraging strategic advantages, Discovering possibilities, Finding compelling directions, Positive future state, Attention to results



# SOAR Process



# SOAR discussion format

- Individual thoughts
  - Small group share
  - Groups compare/create
  - Share with all, time permitting
- 
- Questions to answer after each discussion:
    - What did we learn?
    - What does it mean?
    - What can/will we do with it?



# Strengths – What are we great at?



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- What are we doing well?
- What are the accomplishments of which we are most proud?
- What aspects of your work get compliments from outside your office?
- What are we providing at a level we feel is “world class”?

# Opportunities – What are the possibilities?



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- What are students asking for?
- What external forces or trends may positively impact our work?
- How can we highlight our strengths to distinguish ourselves?
- How can we reframe our perceived challenges into advantages?

# Aspirations – What do we want to be?



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- Consider our **S**trengths and **O**pportunities – What do we want our collective work to look like moving forward?
- What differences will we see on and off our campuses as a result of this work?
- In this future state where we are succeeding in our efforts, what sorts of projects, programs, and processes have been developed to support what we have done?



# Results – What are meaningful outcomes?



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- What meaningful measures, moving forward, will indicate that we're on track to achieving this bright future?
- What processes will need to be developed or modified to reach this future?
- How can we deliver information/knowledge to the internal and external people who need it?
- How can we best share our progress and success?
- What positive changes in culture will be needed to maintain our success?

# Next Steps

- Write a SMART goal to address your challenge.
- Who else do you need to bring on board?
- How can you move towards your goal:
  - Before you leave the conference.
  - In the next week.
  - In the next month.



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# SOAR Process



# Questions?



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BE A **CONNECTOR**  
FOR **TRANSFER STUDENT**  
**SUCCESS**

Thank you  
for attending!

**PLEASE COMPLETE  
A SESSION EVALUATION**  
(via the conference app)

This  
session's  
id# is: **2824**



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