# **Leadership Academy for Student Success Module 7:** **Leading Finance Strategically to Advance Reforms**

## Facilitation Guide

This guide provides an overview of the seventh module in the Leadership Academy for Student Success, originally led by the Success Center for Ohio Community Colleges. This curriculum is developed in partnership with the National Center for Inquiry and Improvement and the Aspen Institute College Excellence Program and draws from Aspen’s fellowship curriculum and additional modules developed for and by the OACC Leadership Academy.

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### *Thank you to the Ascendium Education Group, the ECMC Foundation, and The Kresge Foundation for their support of scaling the Leadership Academy for Student Success.*

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# Introduction

## Curriculum Overview

The curriculum is based on findings from the [Aspen Institute College Excellence Program](https://highered.aspeninstitute.org/), with aligned small group discussion activities and prompts to deepen and apply learning. This version of the curriculum is designed to provide mid-level community college staff and faculty with an understanding of critical student success and change management concepts. The goal is to prepare them to advance to more senior-level positions at their institutions or to more effectively lead from their current role.

This curriculum is designed with 10 modules in a progressive sequence, though modules may be delivered individually for targeted learning. The full sequence is included at the end of this module as a reference.

This curriculum is designed to help meet the following overarching Module 7 goals:

* Understand how to approach institutional finance from a strategic mindset to advance change
* Understand strategies to more effectively use limited institutional resources to advance reforms

## Facilitation Overview

This guide includes module details with facilitation guidance and suggestions for pre-work. A customizable PowerPoint deck and Participant Toolkit are included. This module is designed for in-person delivery; however, it can be adapted for the virtual environment. General virtual facilitation guidance is at the end of this document.

This module will take 2-3 hours to deliver. We recommend that you take time in advance to adapt the suggested agenda and make any necessary customizations to curricular materials to fit your context. Facilitators with experience or knowledge of the module content will deliver the curriculum with the greatest impact. Talking points are included throughout the PowerPoint deck, though we encourage facilitators to put these notes into their own words and bring an institutional perspective to the curriculum where possible.

# Suggested Pre-work

### Consider having your participants complete this reading prior to your session:

[*Funding Guided Pathways: A Guide for Community College Leaders*](https://ccrc.tc.columbia.edu/publications/funding-guided-pathways-guide.html), Community College Research Center (2020)

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# Suggested Detailed Agenda

# Leadership Academy for Student Success

## Module 7

***Note****: This agenda provides the suggested structure and timing of the module. Adjust timing and add breaks as necessary for your delivery. Be aware that the referenced slide numbers and Participant Toolkit page numbers may change as you adapt materials for your context.*

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| **Estimated Timing** | **Session Details and Facilitator Notes** | **Materials** |
| **10-15 minutes** | **Welcome and Overview**   * Welcome participants to the session * Review:   + Module learning goals   + Agenda for the full module   + Overview of the materials: handouts, maps, contact list, etc.   + Pre-work assignments | *Slides 1-4 Participant Toolkit p. 2* |
| **5 minutes** | **Independent Reflection**  Participants respond to the following prompts:   * What is your experience with your college's budget and budget process?   + What do you know about them?   + Does your college’s budget or budget process reflect student success priorities? If so, how? * What do you think it means for finance to be strategic? | *Slide 5 Participant Toolkit p. 3* |
| **35-45 minutes** | **Strategic Finance: Resource Acquisition and Alignment to Mission (Part 1)**  *Facilitation note: Talking points for the presentation are provided in the notes section of the PowerPoint*  Introduction and Finance as Culture (15 minutes)   * What makes strategic finance strategic? * How does your college think about resourcing student success work? * A framework for strategic resource acquisition and mission alignment * Finance as culture   + Key principles   + Why is this so important now?   + What does this look like: traditional to transformational? * Transparency: More than a buzzword * How can colleges signal student success as a goal in all financial reports and requests?   Turn & Talk (10 minutes)   * How would you describe the culture around finance at your college? * Can you think of a time when a financial decision told a story about the college’s priorities? What was the decision and what story did it tell?   Disciplined Revenue and Expenditures (20 minutes)   * Key Ideas * Stranded Assets   + Reallocate year-end balances   + Explore collaborative services   + Revamp the course schedule   + Spread systemic reallocation over a multi-year period   + Examine the functional areas where you are currently spending   + Consider “dark time” personnel budgets   + Consider how your college manages its fund balances * New Areas for Revenue Growth   + “Dos”   + “Don’ts” * Return on Investment Versus Return on Mission | *Slides 6-27 Participant Toolkit pp. 4-7* |
| **15-20 minutes** | **Strategic Finance—Stranded Assets Activity**  *Facilitation note: If you have participants from the same college, consider having them work together to complete the stranded assets worksheet.*  Independent Worksheet (15 minutes)   * Participants will work through the stranded assets activity in the Participant Toolkit. Encourage them to keep the following ideas in mind:   + Think both about your college as a whole and your individual division.   + Where might stranded assets exist and how could they be reallocated?   Walk & Talk (5 minutes)   * Have participants find a partner and discuss their reflections. | *Slides 28-30 Participant Toolkit pp. 8-12* |
| **25-30 minutes** | **Strategic Finance: Resource Acquisition and Alignment to Mission (Part 2)**  *Facilitation note: Talking points for the presentation are provided in the notes section of the PowerPoint.*  Finance Through Partnership (25 minutes)   * Key Ideas * Identifying a Strong Partner Organization * Ecosystem Partnerships: What does this look like? * Case Study: Northern Virginia Community College and George Mason University’s ADVANCE   + George Mason University and Northern Virginia Community College partnered to create the ADVANCE program, a dual admission, guided transfer program designed to align curriculum and guarantee acceptance of all credits included on students’ cross-institutional Academic Pathway   + Maps are built, advising is shared, and scholarships are jointly raised   + 3,300 students enrolled, 40 percent are low-income and the majority are students of color   + Results show evidence of a return on mission and a return on investment.   Walk & Talk (5 minutes)   * How does the approach to partnerships described in this presentation compare to other approaches you’ve seen * Is there an opportunity to apply this learning in your current role? | *Slides 31-37 Participant Toolkit p. 13* |
| **10-15 minutes** | **Module Closing: Debrief and Reflections**  Independent reflection (5 minutes)  Participants reflect:   * What are your takeaways from the module? * What questions do you have? * As a result of this learning, what might you:   + …keep doing?   + …stop doing?   + …start doing?   Walk & Talk (5 minutes)  Participants find a partner and discuss their reflections.  Group Debrief (5 minutes)  Allow a few participants to share closing reflections.   * What learning might you take back to your current role based on this module? * What might you share with others at your institution? | *Slides 38-41 Participant Toolkit p. 14* |

# Techniques for Virtual Facilitation

While originally built for in-person delivery, all our module materials are designed for easy translation to a virtual environment. If you are facilitating this module virtually, it will be helpful to keep the following tips in mind:

* It may save time to create breakout groups randomly. However, if you would like to create specific breakout groups for activities, we recommend you do so ahead of time, so the rooms are ready to deploy immediately after you give instructions.
* Facilitation options for group discussions include sending participants into random Zoom breakout rooms in partners or trios, or facilitating a whole group discussion using a virtual whiteboard, such as Mural, using the chat feature, or using the raise hand feature.
* For virtual delivery, we recommend you omit Walk & Talks/Turn & Talks or turn them into group discussions.

Leadership Academy Module Sequence

This curriculum is designed with 10 modules in a progressive sequence, though modules may be delivered individually for targeted learning. While these modules may be delivered as stand-alone learning sessions, we recommend referencing the sequenced curriculum below and considering if there is any content from other modules that may support your participants’ learning.

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| **Excellence in Student Success at Scale** | | |
| **Session 1: The Essential Roles of Leadership in Student Success** | **Session 2: Keeping Students’ End Goals in Mind** | **Session 3: The Student Experience** |
| Module 1: Defining Student Success | Module 2: Improving Labor Market Outcomes  Module 3: Improving Transfer at Scale | Module 4: Improving Teaching and Learning  Module 5: Aligning Completion Strategies to Post-Graduation Success |
| **Transformational Leadership to Advance Student Success** | | |
| **Session 4: Transformational Leadership for Student Success** | **Session 5: Institutional Capacities to Advance Reform** | **Session 6: Strategic External Partnerships and the Leadership Journey** |
| Module 6: Leadership Qualities for Student Success | Module 7: Leading Finance Strategically to Advance Reforms  Module 8: Leading Strong Teams for Transformational Change | Module 9: Leading Highly Effective Strategic External Partnerships  Module 10: Scaling and Improving Dual Enrollment |