

Strategic Planning Update

Eric W. Kaler, President

Board of Regents
September 13, 2013



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Why plan? Observations, two years in....

- Citizens eager for the U to be good...but distrust what we do (fat and bloated, high tuition, too many administrators)
- Large number of PhD programs, variable quality
- Improving undergraduate experience and metrics, but demographic change will be dramatic
- Need to improve the Medical School
- Athletic success matters
- Need operational improvements
- Opportunity to build reputation to match outcomes
- Need better connection with Greater Minnesota
- Need to improve educational efficiency (MOOCs?)
- Need the right space in the right place
- Heavy consultation and processes
- Not collaborative



In 20 years...

- Nationally prominent undergraduate program
- Leading research institution
- Destination for graduate and professional education
- Recognized faculty excellence
- Nation-leading health care provider
- Athletic powerhouse
- Deep community engagement
- World-class philanthropy
- Sustained state support

All leading to affordable excellence



In a word...

Ambition



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Strategic planning goals

- Overall goal: increase the U's impact and reputation
- Plan should be bold, inspirational and aspirational
- Create a Twin Cities campus plan that intersects those of other campuses
- Articulate a 10-year vision and specific action steps for the next 3-5 years
- Defined metrics to guide investment decisions and articulate both what we will and will not do
- Selectively build on past initiatives, but with a new vision, goals, priorities
- The campus community must own and advocate for the plan
- The plan must reflect the broad diversity of our institution, our state, and our students
- Process should be consultative and inclusive, but timely
- Place a high priority on using existing structures/groups to provide input
- Align with current collegiate or unit strategic plans (e.g., Medical School or OVPR) long range financial plan, and current initiatives, such as ESUP



Potential benefits

Through this process and with this plan we can:

- Create buy-in and ownership among current leaders, including the Board of Regents
- Give the University community a rallying point
 - Leverage a shared ambition for greater excellence
 - Activate a sense of urgency
 - Create a common purpose
- Deliberately choose our priorities, rather than having our future decided for us by others
- Create a more efficient, effective organization by aligning resources and agendas



Why now?

The current plan is outdated and the environment has changed

Existing plan outdated

- *Transforming the U* was a critical road map for the previous administration, however key initiatives have been completed and it no longer serves as a meaningful guide for choices today
- The external environment for higher ed has dramatically shifted

Internal environment

- No longer broad “ownership” for *Transforming the U*
- Leaders, faculty, and staff are hungry to put their stamp on articulating leadership, priorities, direction
- Students are highly engaged with better outcomes than at any time in history
- A lot of systems and process change underway that can be leveraged and aligned

External environment

- High degree of skepticism about higher education’s cost and effectiveness in both academic and operational outcomes
- Policy makers, business leaders express frustration with pace of change at the U
- High degree of confidence in current leadership—perceived as change agents



Strategic plan components

Plan framework: BOR action

Vision

What we want to achieve, inspirational/ aspirational

Mission

Who we are, why we exist

Values

What we stand for drives culture and decision making

Goals

(w/ measures / targets)

A broad statement of what will be achieved, goals provide long term overarching direction

Strategies

(w/ measures / targets)

Strategic focus to achieve each goal

Action plans

Specific actions to achieve each strategy

Annual priorities
(FY15-FY19)

Long-term work plan aligned to strategic plan



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Getting the work done



Strategic Planning Workgroup

- Karen Hanson, Sr. VP and Provost, Chair*
- Barb Bezat, Archivist, University Libraries
- Renee Cheng, Professor, CDES
- Will Durfee, Professor, CSE*
- Aaron Friedman, Dean and VP, AHC*
- Reuben Harris, Professor, CBS
- Mick Hedberg, Undergraduate, CLA
- Brian Herman, VP, Research*
- Mary Jo Kane, Professor, CEHD
- Tim Kehoe, Professor, CLA
- Joe Konstan, Professor, CSE
- Al Levine, Liaison for Special Initiatives*
- Elizabeth Lightfoot, Associate Professor, CEHD
- Becky Malkerson, Interim President, UMF
- Meghan Mason, Graduate Student, SPH
- Richard Pfutzenreuter, VP, Finance*
- Abel Ponce de Leon, Professor, CFANS
- Carissa Schively Slotterback, Associate Professor, HHH
- Catherine Squires, Associate Professor, CLA
- G. David Tilman, Regents Professor, CBS
- Jakub Tolar, Associate Professor, Medical School
- Chris Uggen, Professor, CLA
- Kamil Ugurbil, Professor, Medical School
- Pamela Wheelock, VP, University Services*
- Amelious Whyte, Assistant Dean, Office of Student Affairs
- Aks Zaheer, Professor, CSOM

** Denotes Executive Committee member*



Timeline

July-August
'13

- Complete best practice research
- Consult BOR, FCC, Deans, SLG, consultative groups
- Charge Strategic Planning Workgroup

Fall '13

- Campus wide engagement to inform framework development
- Share feedback / communications
- Strategic Planning Workgroup drafts plan framework

Winter '13

- Board review/act on plan framework elements
- Continue campus engagement
- Share framework broadly

Winter/
Spring '14

- Implementation planning convened, as needed
- Implementation plans developed
- Metrics developed to support plan

Summer-Fall
'14

- Finalize full strategic plan, recognizing it is dynamic
- Board review/action on full plan
- Disseminate full plan broadly

Fall '14 and
beyond

- Leaders align annual budgets, priorities and work plans to the strategic plan
- Implementation
- Ongoing monitoring and support



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Robust engagement

Key questions and decisions:

- *What* input do we need to build each section of the plan?

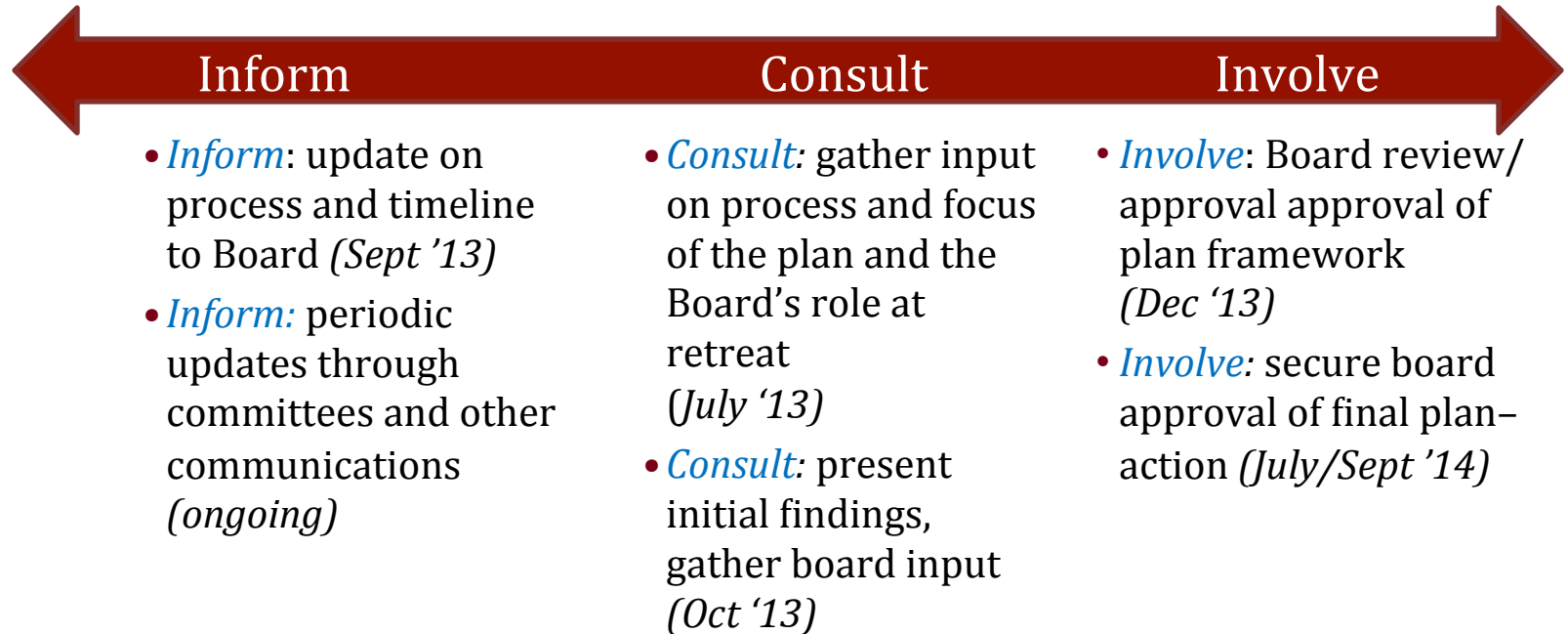


- *Who* do we need the input from?
- *Who* is making the final decision on each section (e.g. deciding the vision, deciding the goals, deciding the action steps)?
- *Who* is doing the work?

Goal: to ensure appropriate input, consultation and/or engagement at each step in the planning process



BOR involvement



Summary

- Our goal is an ambitious, bold plan to chart our course for the future
 - Expect it will require some tough, unpopular decisions
- Strong executive leadership and a faculty-driven process
- The process will be consultative and inclusive, but timely



Discussion/questions



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