Strategic Planning: Case Study of the Top-Tier Research University Thematic Team

Presentation to the Education Committee of the Board of Regents
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Background

Academic plans

2 year process

Table of content
• Program array
• Successful students
  • Enrollment
  • Retention
  • Student live
• Research
• Recruitment plans
• Resources
Overview

• Top-Tier Research University Thematic Team
  – 19 members
  – 45 meetings over one year

• Team Dynamic
  – Forming, Storming, Norming, Performing, Transforming
  – Process involved phases of
    • Discussion & Information-Gathering
    • Synthesis

• Results
  – Changed perspective on strengthening research
  – Critical components of strategic plan
  – Interconnected nature of campus goals
Phase 1: Collective Experiences

• Initial meetings
  – Individual experiences and concerns
  – Collective experience with past studies
  – Sort into a few “buckets”

• Synthesis 1: Identify six objectives
  – Generalize into major components of what is needed to support research
Best Place For Research

Research Environment  Budget Alignment

Research Excellence

Build on Strengths

Incentives  Resources

Culture of Creativity  Community Links
Phase 2: A Closer Look

• Examine each objective
  – Campus input via listening sessions
  – Extended team meetings for “deep dives”

• Reform each objective
  – Outcomes
  – Strategies
  – Actions

• Synthesis 2: Objectives -> General Strategies
The Process

- TTRU Outcomes
- Level 2 Outcomes
- Level 1 Outcomes
- Processes & Activities

Align Objectives with Research Outcomes

Link Objectives to Outcomes

Major effects of outcomes

Direct impacts

“Deep dive” ideas

Re-evaluate
<table>
<thead>
<tr>
<th>Processes &amp; Activities</th>
<th>Level 2 Outcomes</th>
<th>Level 1 Outcomes</th>
<th>Objectives</th>
<th>TTRU Outcomes</th>
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</thead>
<tbody>
<tr>
<td>Build on strengths</td>
<td>Interchange of scholars</td>
<td>Research Leaders</td>
<td>A1. Assemble the Best Researchers and Teams</td>
<td>Research Ranking</td>
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<td>Enable/strengthen directed recruitment of key personnel and research teams</td>
<td>Faculty who are sought out</td>
<td>Top Personnel</td>
<td></td>
<td>Student Success</td>
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<td>Direct interchange with external key centers for post-docs and fellows, students</td>
<td>Students who are strongly recruited</td>
<td>Culture of Research</td>
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<td>Faculty &amp; Staff Satisfaction</td>
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<td>UWM is center for conferences, research meetings</td>
<td>Research Brand</td>
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<td>Research Across Programs</td>
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<td>Portfolio of patents</td>
<td>Strong Research Groups</td>
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<td>Impact</td>
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<td>Increased scholarly outputs</td>
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<td>Funding</td>
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Phase 3: Broader Consultation

• Expand perspective
  – Campus retreat: Deans, Chairs, Governance, SP Teams
  – Relationships to other teams’ work
  – Developmental paths of projects and people

• Specific information
  – Filled out the list of action items
  – Metrics for TTRU
  – Costs: dollars, time and effort

• Priorities
  – ~75 ideas -> 15-20 most critical actions

• Synthesis 3: Report
Team Report: Research Outcomes

• TTRU -> Research Outcomes that form the basis for actions
  – Scholarship
  – Successful Students
  – National/International Reputation
  – Regional Impact/Commercialization
  – Faculty and Staff Satisfaction
  – Stable/Expanding Funding
Team Report: Themes

• Recommended actions/investments organized around three themes
  – Focus on Critical Research Themes
  – Assemble the Best Research Teams
  – Develop a Top-Tier Research Infrastructure
Team Report: Perspectives

- More deliberate approach to using funds
  - Use resources as investments
  - Need to target specific outcomes
  - Assess results and adjust

Campus Vision:
... to be a top-tier research university...

Investments

Outcomes
Team Report: Perspectives

- Research Excellence
- Student Success
- Community Engagement
- Innovative Environment
Integration with Strategic Plan

• Research excellence as leading goal
• Clarify the importance of cross-cutting initiatives
• Focus on outcomes and assess progress
Top-Tier Research University Thematic Team Members

- Ewa Barczyk
- David Crass
- Jackie Fredrick
- Marija Gajdardziska-Josifovska
- David Garman (Co-Chair)
- Prasenjit Guptasarma
- Mark Harris (Co-Chair)
- Hemant Jain
- Heidi Janzen
- Katherine Kober
- Michael Liston
- David Petering
- Nigel Rothfels
- Mark Schwartz
- Brian Thompson
- Luc Vanier
- Cindy Walker
- Merry Wiesner-Hanks
- Mary Ann Wright