

## Executive Summary:

Strategic Planning Retreat: Prioritization and Alignment of Future Strategic Action Initiatives held 18 January 2005

Prepared for Chancellor Richard H. Wells by Susan Nuernberg, Chancellor's Leadership Fellow, March 14, 2005

### **Introduction**

Over 100 faculty, staff and students participated in the Strategic Planning Retreat: Prioritization and Alignment of Future Strategic Action Initiatives held on 18 January 2005 in Reeve Union between noon-5:00 PM. The delegates were selected by the colleges, other units and governance groups. The function of the retreat was to assess the University's current strategic high priority action initiatives, many of which have been successfully launched in recent years, and to identify a new set of high priority strategic action initiatives for the next 3-5 years from those proposed by the colleges and other units. Further details on the retreat's purpose and agenda are available at:

[http://www.uwosh.edu/chancellor/assets/PDFs/Memo\\_and\\_agenda.pdf](http://www.uwosh.edu/chancellor/assets/PDFs/Memo_and_agenda.pdf)

Chancellor Richard Wells welcomed the delegates, reviewed the objectives of the retreat, and summarized UW Oshkosh's accomplishments to date and the lessons learned from the 17 August 2004 Strategic Planning Retreat. His slide presentation is available for viewing at:

[http://www.uwosh.edu/chancellor/assets/powerpoints/Strategic\\_Planning\\_Retreat\\_Jan\\_18.pps](http://www.uwosh.edu/chancellor/assets/powerpoints/Strategic_Planning_Retreat_Jan_18.pps)

### **Assessment of Current Strategic Action Initiatives**

Retreat delegates were asked to assess the current strategic action initiatives. The Strategic Action Priorities Progress Report appears in the 2004 Strategic Plan Update and Annual Report, which is available at

<http://www.uwosh.edu/chancellor/plan/annualreport04full.pdf>. The delegates expressed agreement that 17 of the current 23 strategic action initiatives pre-identified as "accomplished and launched" are off to a good start and have a promising future. Each delegate was given two blue dots with which to register a "vote" to continue giving University-wide high priority strategic attention to any of the 17 initiatives. Some delegates expressed concern over withdrawing strategic high-priority attention from the Facilities Master Plan. Of a possible total of 200 blue dots, 45 or 22.5% of them were placed on the Facilities Master Plan. None of the other 16 initiatives classified as "accomplished and launched" received more than 18 blue dots or 9% of a possible total of 200 "votes." Complete details are available at:

<http://www.uwosh.edu/chancellor/assets/PDFs/Launched.pdf>

Delegates also evaluated and prioritized the 6 remaining initiatives as candidates for continued University-wide high priority strategic attention (green dot) or as candidates for retirement from the list of high priority Strategic Action Initiatives (red dot). Delegates "voted" by placing either a red or a green dot on each of the 6 initiatives.

A clear consensus emerged for continuing to give the Faculty Compact high priority attention when delegates placed 98 green dots and only one red dot on it. Delegates also recommended a continuation of priority status for the General Education Program, the Environmental Studies Community Resource Center and the Student Compact. Of 73 total dots on the General Education Program, 60 or 82% of them were green. Of 78 total dots on the Environmental Studies Community Resource Center, 62 or 78% of them were green. Of 98 total dots on the Student Compact, 60 or 61% of them were green.

Delegates recommended retirement for only two initiatives: Arts Management and Competitive Manufacturing through Technology Management (Oshkosh-Stout). Of 92 total dots on Arts management, 61 or 66% were red. Of 105 dots on the Oshkosh-Stout Competitive Manufacturing program, 63 or 60% were red. For complete details, see [http://www.uwosh.edu/chancellor/assets/PDFs/Evaluate\\_and\\_Prioritize.pdf](http://www.uwosh.edu/chancellor/assets/PDFs/Evaluate_and_Prioritize.pdf)

**Assessment of the Colleges' Strategic Action Initiatives in Terms of Ability to Help** Provost and Vice Chancellor Lane Earns introduced the four Cross-College Distinctiveness Themes: Engaged Learning, Globalization, Community Engagement and Student Excellence. He explained that the deans organized the initiatives proposed by the colleges around these themes as a way to recognize the commonality of these themes in their individual plans and missions. Further details are available at <http://www.uwosh.edu/chancellor/plan/crosscollegeinitatives.php>

Delegates were asked to help prioritize the initiatives proposed by the colleges. Each dean made a 5-minute presentation following which delegates were given 20 minutes to discuss the initiatives proposed by that college. At the end of the group discussions, delegates responded to two questions:

- Which college initiatives do you think are most important for strategically moving forward one or more of the cross-college distinctiveness themes?
- Which college initiatives, if any, do you have knowledge, resources, interest in working on and willingness to contribute your time to over the next 3-5 years?

Delegates did not “vote” to prioritize the initiatives proposed by their own college or unit. For the first question, delegates were given 2 “votes” each for COBA, CON and COEHS, and 3 “votes” for COLS. For the second question, delegates were given a sheet for each college and one for Academic Affairs/Student affairs. Over half of the 100 delegates present, 56 of them, filled out sheets offering assistance on initiatives proposed by colleges or units other than their own. Of these 56 delegates, 28 or 50% of them submitted two or more sheets, and 28 or 50% of them submitted one sheet.

Of the 56 delegates who submitted sheets, 15 or 27% of them submitted **2 sheets each**. 5 of the 56 or 9% of them submitted **3 sheets each**. 4 of the 56 or 7% of them submitted **4 sheets each**, and another 4 of the 56 or 7% of them submitted **5 sheets each**. In addition, 6 sheets were turned in with comments but without a name.

**COBA**

The College of Business Administration proposed eight initiatives. The New Venture Center received highest priority with 46 or 25.5% of the 180 votes cast, and the Community Engagement initiative, establishing a Center for Family Business Research and Services, was ranked second with 33 or 18% of the total votes. One of the engaged Learning initiatives, establishing a student owned and operated business, received 25 or 13.8% of the total votes, and the Globalization initiative, developing a global MBA degree, received 23 or 12.7% of the total votes. None of the other four initiatives received more than 8% of the total votes.

In response to the second question, delegates turned in 35 sheets for COBA initiatives. The offers of assistance clustered around the initiatives that received high priority rankings with the exception of the two Student Excellence initiatives, which received proportionally more offers of assistance than other initiatives that also received 5 votes. The New Venture Center received 11 offers to help from delegates, and Establishing a student owned and operated business received 7. The following four initiatives all received 5 offers of support: the Globalization initiative, Developing a global MBA degree, the Community Engagement initiative, Establishing a Center for Family Business Research and Services, and both of the Student Excellence initiatives: Improving the quality of students entering COBA, and Defining and recognizing excellence for undergraduate and graduate students. In addition, two of the responses offered open assistance in any way needed, and three offered expertise not tied to specific initiatives in areas such as diversity and fundraising.

## **COLS**

The College of Letters and Science proposed eleven initiatives. The top two priorities were Community Engagement initiatives: The Center for Aquatic Studies received highest priority with 37 or 17% of the 216 votes cast, and the Center for Collaborative Efforts with PK-12 Schools was ranked second with 31 or 14% of the total votes. An Engaged Learning initiative, the Center for Student/Faculty Research Collaboration, was ranked third with 25 or 11.5% of the total votes. None of the other eight initiatives received more than 9% of the total votes cast.

In response to the second question, delegates submitted 27 sheets for COLS initiatives. Besides 3 open offers, delegates offered their help to work on various issues including health-related issues, incorporating arts/literature into health care practices, and increasing communication and collaboration between COEHS and COLS. The Center for Aquatic Studies, which was ranked as the highest priority, received 2 offers of aid. The Center for Collaborative Efforts with PK-12 Schools received 7 offers of support. Five initiatives received 4 offers each: Center for Integration of Theory with Applications, Center for Student/Faculty Research collaboration, Center for Integration of Residential Life with Academic Programming, Center for cultural and Intellectual Outreach to the Community, and Center for the Promotion of the Liberal Arts. The Center for Ethnic Studies received 2 offers to help and the Center for Honors Programming received 1 offer of assistance.

## **CON**

The College of Nursing proposed five initiatives. The Engaged Learning initiative, Innovative clinical internships and clinical partnerships for undergraduate and graduate student learning, received highest priority with 62 or 34.4% of the 180 votes cast. The second and third priorities were both Community Engagement initiatives. Exploring the feasibility of collaborative efforts with UW Colleges, WI Technical Colleges in local and neighboring communities received 56 or 31% of the total votes, and providing community clinical experiences for all students received 38 or 21% of the total votes. Neither of the other two initiatives received more than 10.5% of the total vote.

In response to the second question, delegates submitted 18 sheets for CON initiatives, including three open offers of assistance. Delegates offered expertise that may apply to more than one initiative, including interpersonal skill training and the development of supervisory skills such as conflict resolution and student leadership, understanding poverty, fundraising and outreach efforts, developing financial models that explore feasibility in collaborative efforts, and collaboration to develop smooth transition from Associate degrees to Bachelor's degrees. The Engaged Learning initiative, Seeking innovative clinical internships and clinical partnerships for undergraduate and graduate student learning, which was ranked first in terms of priority, received only one offer of assistance, while the second ranked initiative, Exploring feasibility of collaborative efforts with UW Colleges, WI Technical Colleges in local and neighboring communities, received four offers of assistance, the most for any single initiative. Delegates submitted three offers each for the Globalization initiative, Encouraging students and graduate level clinical internships in underserved US communities and international sites, and for one of the Community Engagement initiatives, Providing community clinical experiences for all students that build cultural competency and address priorities of Healthy People 2010. The Student Excellence initiative, Expanding assessment strategies to meet benchmarks of excellence as students progress through curriculum, received two offers of aid.

### **COEHS**

The College of Education and Human Services proposed five initiatives. Two Engaged Learning initiatives received top priority with Alternative Licensure Programs for Teachers receiving 67 or 38.5% of the 174 votes cast, and Structure to foster collaboration with COLS receiving 45 or 25.8% of the total votes. The Globalization initiative, Expand diversity initiatives with ELL and Native American Students, was ranked third with 29 or 16.6% of the total votes and not far behind was an Engaged Learning initiative, PI 34 new teacher licensure initiatives, which ranked fourth with 27 or 15.5% of the total votes cast.

In response to the second question, delegates submitted 20 sheets for COEHS initiatives. Besides 2 open offers, delegates offered expertise in areas such as developing an American Indian Studies minor, preparing teachers with additional "realities" such as poverty and learning styles, introducing teaching methodology training for new faculty, workshops to support professional development, conflict resolution and mediation training, developing contracts, course fees and budgets, assisting with fundraising and other outreach efforts, planning and refinement of programs for diverse students, serving as a contact person in a COLS department and as a mentor in the new teacher licensure

initiative, health related issues. The Globalization initiative, Expanding diversity initiatives with ELL and Native American Students, received 6 offers of assistance even though it was ranked third in terms of priority. The initiatives for PI 34 new teacher licensure initiatives, and Structure to foster collaboration with COLS both received 5 offers of assistance. The highest ranked priority, Develop alternative licensure programs for teachers, received 4 offers of help, and the Refinement of student portfolio assessment process received 2 offers of support.

For complete details, see

[http://www.uwosh.edu/chancellor/assets/PDFs/Initiatives\\_proposed\\_by\\_colleges.pdf](http://www.uwosh.edu/chancellor/assets/PDFs/Initiatives_proposed_by_colleges.pdf)

### **Assessment of Other Units' Strategic Action Initiatives in Terms of Ability to Help**

Delegates were also asked to help prioritize the initiatives proposed by units other than colleges and to respond to two questions:

- Which unit initiatives do you think are most important for strategically moving forward one or more of the University's Governing ideas?
- Which unit initiatives, if any, do you have knowledge, resources, interest in working on and willingness to contribute your time to over the next 3-5 years?

Each delegate was given two "votes" to prioritize the seven initiatives proposed by units other than colleges.

### **STUDENT AFFAIRS**

The two initiatives proposed by Student Affairs and presented by Vice Chancellor Elliott Garb received top priority from the delegates. The highest ranked initiative was Differential Tuition and Student Compact with 56 or 33.3% of the total 168 votes. Delegates gave second priority to Strategic Planning for the Residence halls with 34 or 20.2% of the total votes.

The initiatives ranking first and second in priority also received the most offers of assistance from delegates. The Differential Tuition and Student Compact, received 8 offers of support, and Strategic Planning for the Residence Halls received 4 offers. There was, in addition, one open offer of assistance.

### **ACADEMIC AFFAIRS**

Two initiatives proposed by Academic Affairs and presented by Provost and Vice Chancellor Lane Earns tied for the third highest priority. The Polk Library initiative, Engage Students in Learning Information Literacy Skills, and the Continuous Learning initiative, Extend Excellence in Higher Education for Working Adults, each received 20 or 11.9% of the total votes. None of the other initiatives proposed by units other than colleges received more than 8.3% of the total votes cast.

The Continuous Learning initiative to Develop International and Intercultural Learning Opportunities for Adult Students received 7 offers of support, while the other Continuous Learning initiative to Extend Excellence in Higher Education for Working Adults received 3 offers of assistance. The three initiatives proposed by the Polk Library each received one offer of support.

Further details are available at

[http://www.uwosh.edu/chancellor/assets/PDFs/INITIATIVES\\_PROPOSED\\_BY\\_OTHER\\_UNITS.pdf](http://www.uwosh.edu/chancellor/assets/PDFs/INITIATIVES_PROPOSED_BY_OTHER_UNITS.pdf)

### **Next Steps**

Chancellor Wells introduced delegates to a working definition of the University's seven key operational plans and announced that he was charging the provost and vice chancellors to develop a draft of these key operational plans using inclusive, interactive and transparent processes as a next step in the ongoing strategic planning process. The key operational plans are:

1. Academic Program and Student Outcomes Assessment Plan
2. Human Resource Support and Development Plan
3. Enrollment Management and Student Support Plan
4. Finance and Budgeting Plan
5. Facilities Master Plan
6. Advancement and Relationship Development Plan
7. Information Technology Plan

For complete details, see

<http://www.uwosh.edu/chancellor/assets/PDFs/DevelopmentofSevenKeyOperationalPlans.pdf>

Chancellor Wells wrapped up the retreat by thanking the delegates for their commitment to and participation in the strategic planning process and by announcing dates for the submission of reports, drafts and recommendations so that the outcomes of the planning retreat can be analyzed and discussed during the summer of 2005 and at governance group meetings as well as in open campus-wide forums in the fall of 2005. Deadlines announced are:

15 April 2005:

- Colleges and other Units submit final recommendations for strategic action initiatives.
- Draft of refined Key Operational Plans submitted.

Fall 2005:

- New strategic action initiatives and key operational plans announced in cumulative Annual Report.