UNC College of Arts & Sciences Strategic Planning Project

Advisory Committee Meeting 3 (& Final)

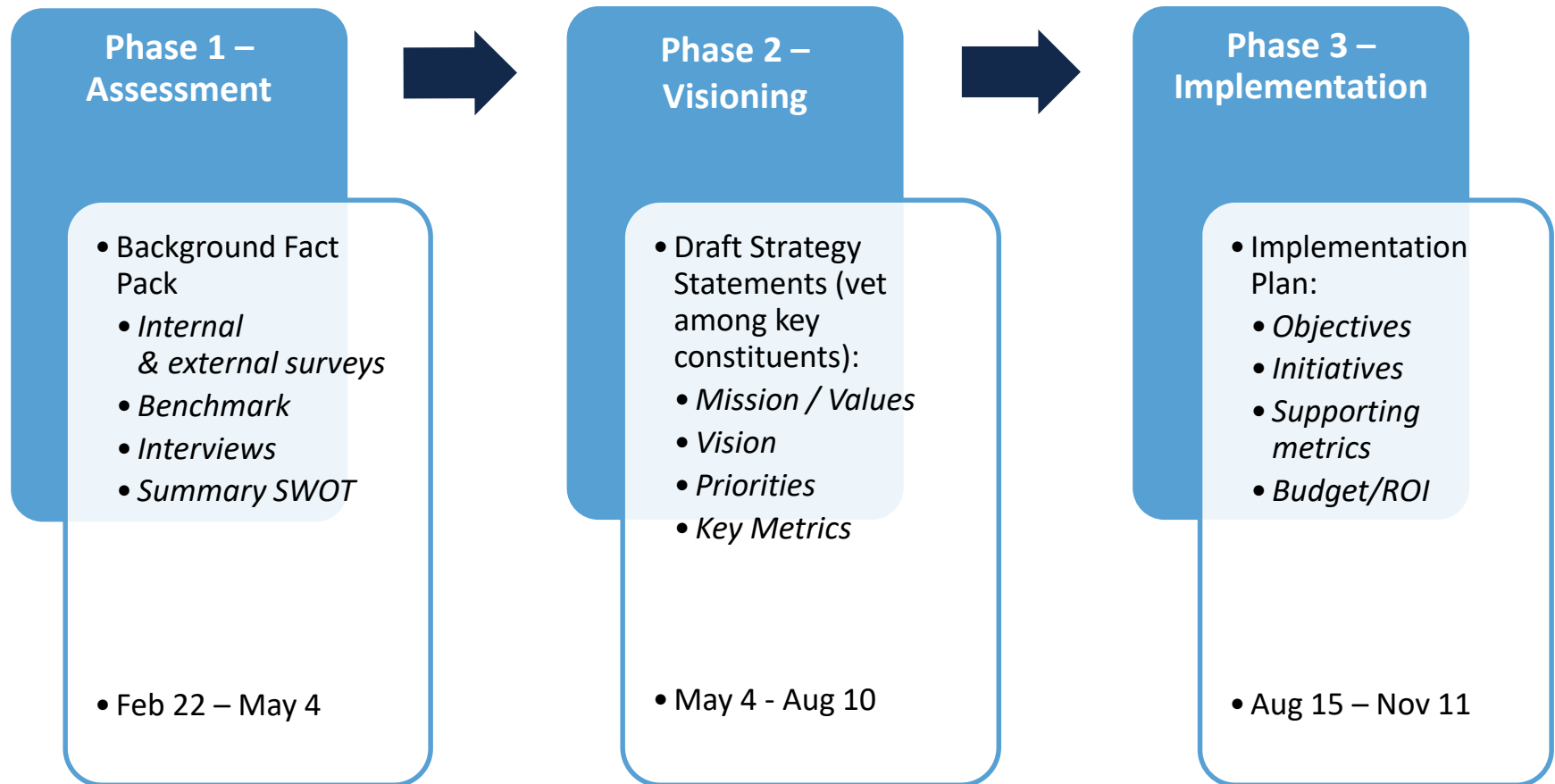**November 11, 2016**

Agenda

1 Project Overview

2 Final SWOT

3 Revised Strategy Statements

4 Implementation Plan: Priorities, Objectives, Initiatives & Metrics
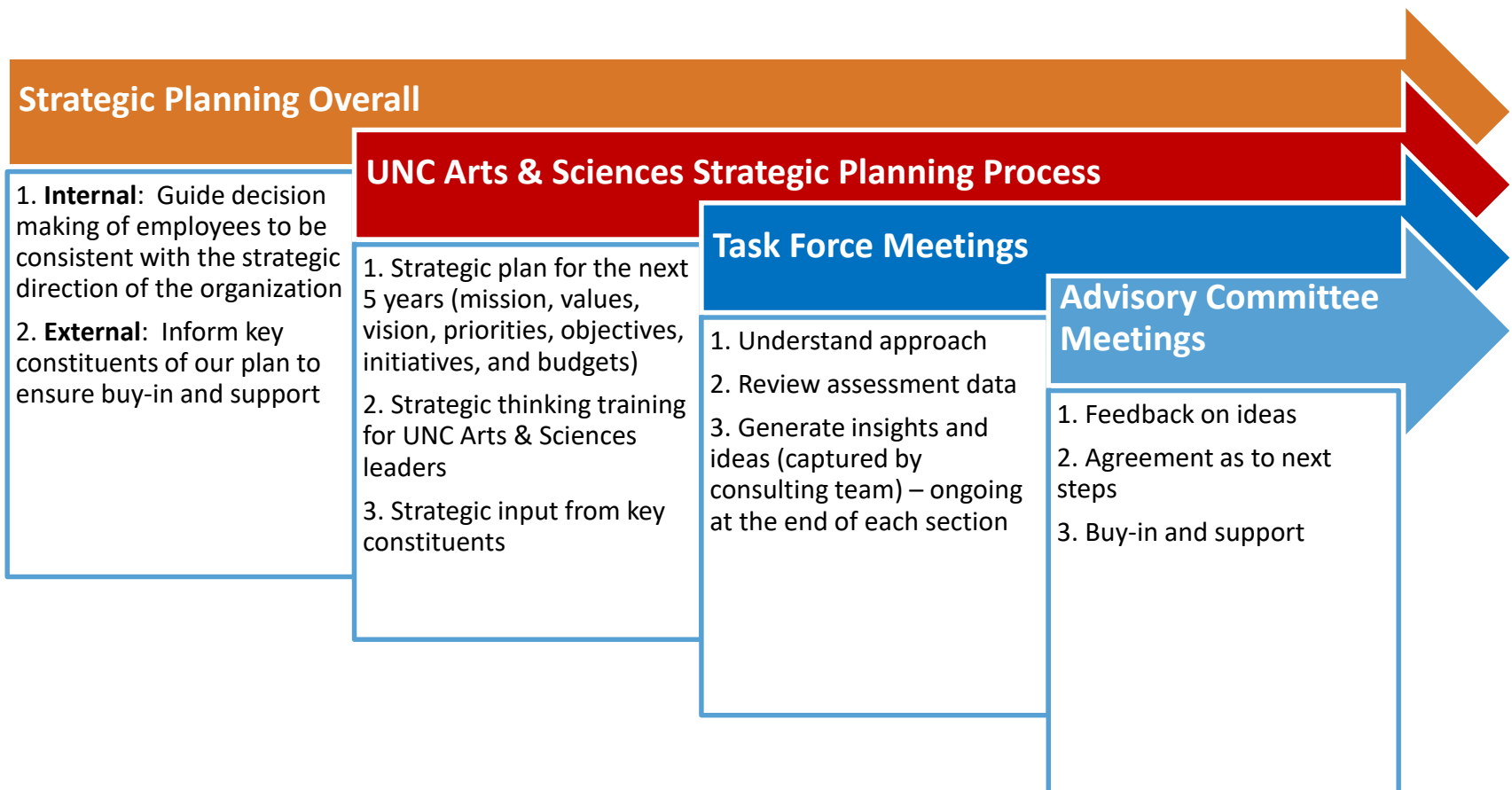
UNC
COLLEGE OF ARTS & SCIENCES

Agenda

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4 Implementation Plan: Priorities, Objectives, Initiatives & Metrics

Part A (College of Arts & Sciences Strategy) will conclude by Nov 11th

Phase 1 – Assessment

- Background Fact Pack
  - *Internal & external surveys*
  - *Benchmark*
  - *Interviews*
  - *Summary SWOT*

- Feb 22 – May 4

Phase 2 – Visioning

- Draft Strategy Statements (vet among key constituents):
  - *Mission / Values*
  - *Vision*
  - *Priorities*
  - *Key Metrics*

- May 4 - Aug 10

Phase 3 – Implementation

- Implementation Plan:
  - *Objectives*
  - *Initiatives*
  - *Supporting metrics*
  - *Budget/ROI*

- Aug 15 – Nov 11

Our goals and methodology

Strategic Planning Overall

1. **Internal**: Guide decision making of employees to be consistent with the strategic direction of the organization

2. **External**: Inform key constituents of our plan to ensure buy-in and support

UNC Arts & Sciences Strategic Planning Process

1. Strategic plan for the next 5 years (mission, values, vision, priorities, objectives, initiatives, and budgets)

2. Strategic thinking training for UNC Arts & Sciences leaders

3. Strategic input from key constituents

Task Force Meetings

1. Understand approach

2. Review assessment data

3. Generate insights and ideas (captured by consulting team) – ongoing at the end of each section

Advisory Committee Meetings

1. Feedback on ideas

2. Agreement as to next steps

3. Buy-in and support

UNC College of Arts & Sciences task force

Kevin Guskiewicz – Dean of the College of Arts & Sciences

Rob Parker - Senior Associate Dean for Development

Jonathan Hartlyn – Senior Associate Dean, Social Sciences and Global Programs

Terry Rhodes – Senior Associate Dean, Fine Arts & Humanities

Chris Clemens – Senior Associate Dean, Natural Sciences

Abigail Panter - Senior Associate Dean for Undergraduate Education

Tammy McHale - Senior Associate Dean for Finance and Planning

Geneva Collins - Director of Communications

Key responsibilities include weekly meetings to generate draft strategy statements and support research, interactions with key constituents, and reporting to the Advisory Committee

Consulting team

Lead Consultant

Paul Friga

-Director of Student Teams Achieving Results and Global Business Projects
-Previously worked for PwC and McKinsey & Company
-Received his PhD and MBA from UNC Kenan-Flagler

Project Leader

Kristen Anderson

-MBA '16 (Concentration: Corp Finance)
-Biology and French at Princeton University
-6+ years of pre-MBA Work Experience
-Summered at BofA - Technology
-Going to Bain & Company Full-time

Parks Tompkins

-UNC Kenan-Flagler BSBA (Graduation: May 2017)
-Concentration: Consulting
-Minoring in Environmental Sustainability
-Working with Dr. Friga this summer

Team Members

Rodrigo Aquino

-MBA '16 (Concentration: Consulting)
-Lawyer graduated from FDMC (BRA)
-7+ years of pre-MBA Work Experience
-Summered at Deloitte Consulting S&O
-Going to Bain & Company Full-time

Charlotte McCauley

-Advanced Academy of Georgia at UWG
-UNC Kenan-Flagler BSBA (Graduation: December 2016)
-Concentration: Consulting
-Interning at IBM this summer

Jordan Roseborough

-UNC undergraduate junior
-Double majoring in Business (Concentration: Consulting) and Exercise & Sport Science
-Interning at Prophet Consulting this summer

Key responsibilities include secondary research, primary research, analysis of options, slide deck creation, and updates to key constituents

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Advisory committee

Name	Title
Ritch Allison	President, Domino's International
Bob Blouin	Dean, Eshelman School of Pharmacy
Fitz Brundage	Chair, Department of History
Sunny Burrows	ASF Board of Directors
Julie Byerley	Vice Dean for Education and Chief Education Officer, UNC School of Medicine
Bruce Cairns	Chair, Faculty Council
Kia Caldwell	Director, Faculty Diversity Initiatives
Munroe Cobey	Chair, ASF Board of Directors
Rudi Colloredo-Mansfeld	Chair, Department of Anthropology
Jim Dean	Executive Vice Chancellor and Provost
Joseph DeSimone	Chancellor's Eminent Professor of Chemistry
Chuck Duckett	UNC-Chapel Hill Board of Trustees
Bernie Herman	Chair, Department of American Studies
Kelly Hogan	Director, Instructional Innovation Department of Biology

Name	Title
Kelly Hopkins	UNC-Chapel Hill Board of Trustees
Bill Keyes	UNC-Chapel Hill Board of Trustees
Andy Lang	Director, OASIS
Steve Lerner	Former UNC-Chapel Hill Board of Trustees
Don Lysle	Chair, Department of Psychology & Neuroscience
Rich McLaughlin	Chair, Department of Mathematics
Charles Merritt	Executive Director of Entrepreneurship Minor
Barbara Rimer	Dean, Gillings School of Global Public Health
Dylan Russell	Graduate and Professional Student Federation President
Doug Shackleford	Dean, UNC Kenan-Flagler Business School
John Wilson Sink	Student Body Director, State and External Affairs
Michael Stutts	Boston Consulting Group Partner
Randall Styers	Chair, Department of Religious Studies
Richard Superfine	Taylor-Williams Distinguished Professor of Physics and Astronomy
Tom Uhlman	ASF Board of Directors
Lachonya Williams	Assistant Dean for Human Resources

Key responsibilities include offering ideas and input related to strategy to task force, responding to draft strategy statements and support in scheduled meetings, and communicating progress to key constituents

Why do strategic planning?

Direction

- Clarity around why our department/unit is here (mission), what we appreciate (values), and where we are headed (vision) serves as an important lens for daily decisions
- Specifically, strategy can provide guidance for internal prioritization, which faculty to hire, and how to spend our limited resources in the most effective way
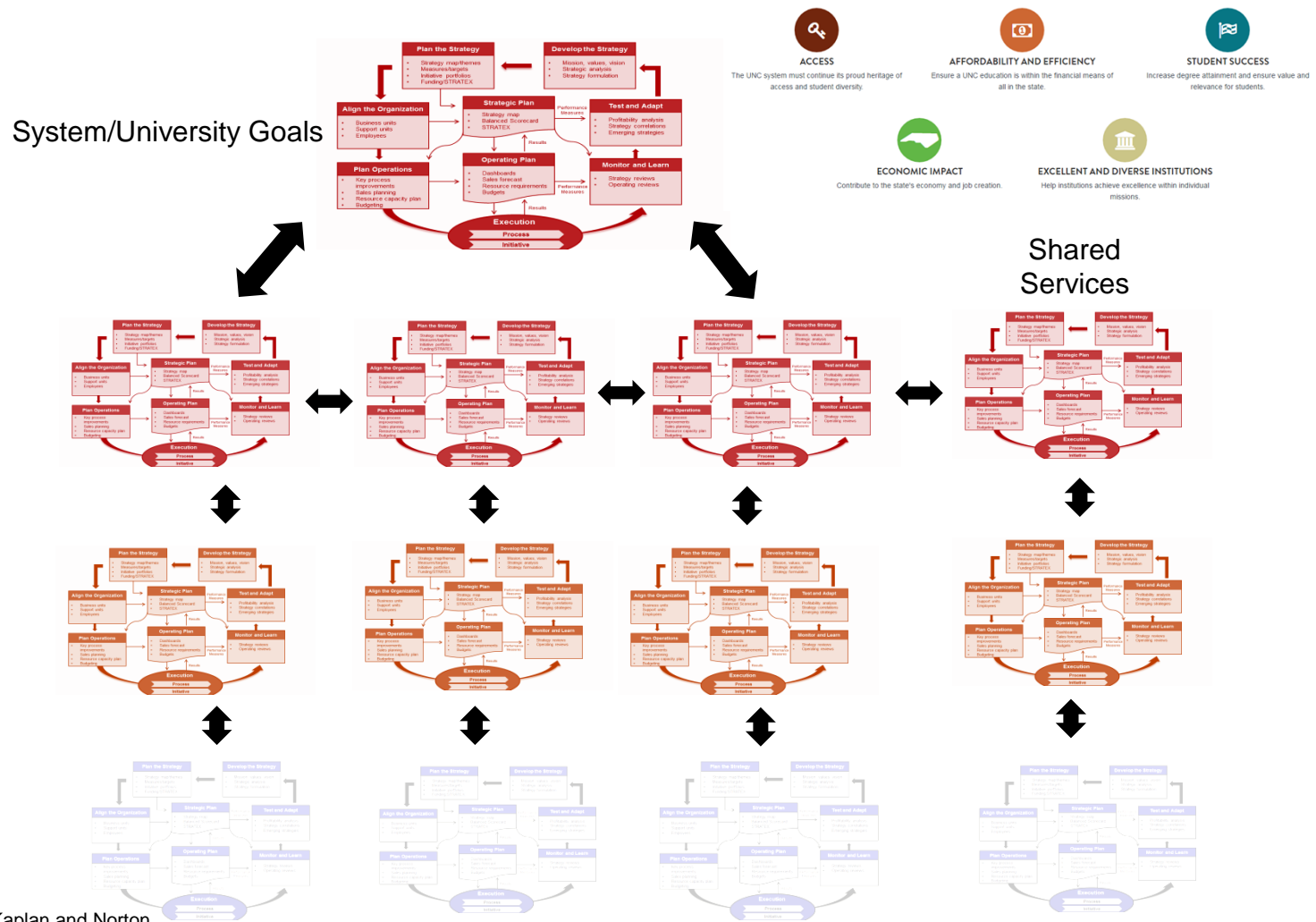
Morale

- A clear strategy decreases ambiguity about the future of a department and increase morale of faculty and staff
- It is also a powerful tool for bringing in top new faculty and attracting students to our respective program

Resources

- The best way to secure additional resources is align with the strategies/priorities of the University and College
- We have an amazing opportunity to secure new resources through the capital campaign and a strategy enables your unit to convincingly secure support

One goal is to align efforts and activities

System/University Goals

Key Academic Schools/Units

Departments

Teams and Individuals

Shared Services

Source: The Execution Premium by Kaplan and Norton

Agenda

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2 **Final SWOT**

3 Revised Strategy Statements

4 Implementation Plan: Priorities, Objectives, Initiatives & Metrics

We conducted and revised our SWOT analysis

Internal Analysis

Strengths	Weaknesses

Traits within our organization that we could leverage in the future or mitigate through strategic actions

External Analysis

Opportunities	Threats

Elements outside of our organization of which we have no control but that could (and should) affect our strategy

SWOT analysis – The UNC College of Arts & Sciences (revised)

(Based on 1,048 faculty/staff survey responses, BCG alumni survey, College Strategic Planning Advisory Committee feedback; Think Tank)

Strengths

- World renowned teaching and research **faculty** who attract excellent students
- Many aspects of a small liberal arts college **experience**, with the resources of a world class research university
- Low tuition and successful employment leading to high **return** on investment

Weaknesses

- Faculty, staff, and graduate students receive below peer average **compensation** and inconsistent raises
- Communication, information exchange, and organizational **inefficiencies**
- Lack of integrated academic **advising** and career mentoring

Opportunities

- Develop a more contemporary, innovative, and interdisciplinary global **curriculum** and new models of delivery
- Differentiate among other universities on our commitment to **service** as the most "public" university
- Expand high impact **research** that engages with rapidly developing and changing world issues

Threats

- Inadequate and decreasing **funding**
- The increasing demand for **value** from a liberal arts degree
- Students **expect** more experiential, customized, and global learning opportunities

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1 Project Overview

2 Final SWOT

3 **Revised Strategy Statements**

4 Implementation Plan: Priorities, Objectives, Initiatives & Metrics

Background for this section

Key Assumptions for Strategy Statements

1. This strategy is for the College of Arts and Sciences and not the university as a whole

2. The strategy is, however, intended to align with the university's strategic framework and guidance

3. It is also intended to serve as a tool for internal decision making in the College and external constituent communication

4. After the draft strategy is finalized and approved, it will be utilized as guidance for departments and units within the College

5. Each department will be asked to create their own strategies, aligned with this strategy, and will be supported in the process by the leadership of the College

6. The strategy statements were created based upon a data-driven SWOT analysis

7. The supporting slides summarizing the analysis are contained within a separate appendix

8. The primary focus for positioning is intended to improve the overall university and, while not targeting one assessment, should lead to improvement of several key university rankings

9. The strategy statements are meant to be as concise, accurate, and memorable as possible and supporting specification will also be provided as needed in subsequent communications

10. The strategy statements will lead to the creation of an implementation plan that includes priorities, objectives, and initiatives along with measurable goals and resource requirements

Strategy statements

Mission Statement

Statement which specifies a firm's purpose or "reason for being" and the primary objective toward which the firm's programs & plans should be aimed. Statement specifying the firm's key constituents and how the organization will serve them. It must be clear and understood.

Vision Statement

Statement describing what the organization strives to be at some future time. It should be specific and motivating.

Values

It is what we believe in, our guiding principles, and how we interact.

Mission

Vision

Values

Priorities

Objectives

Initiatives
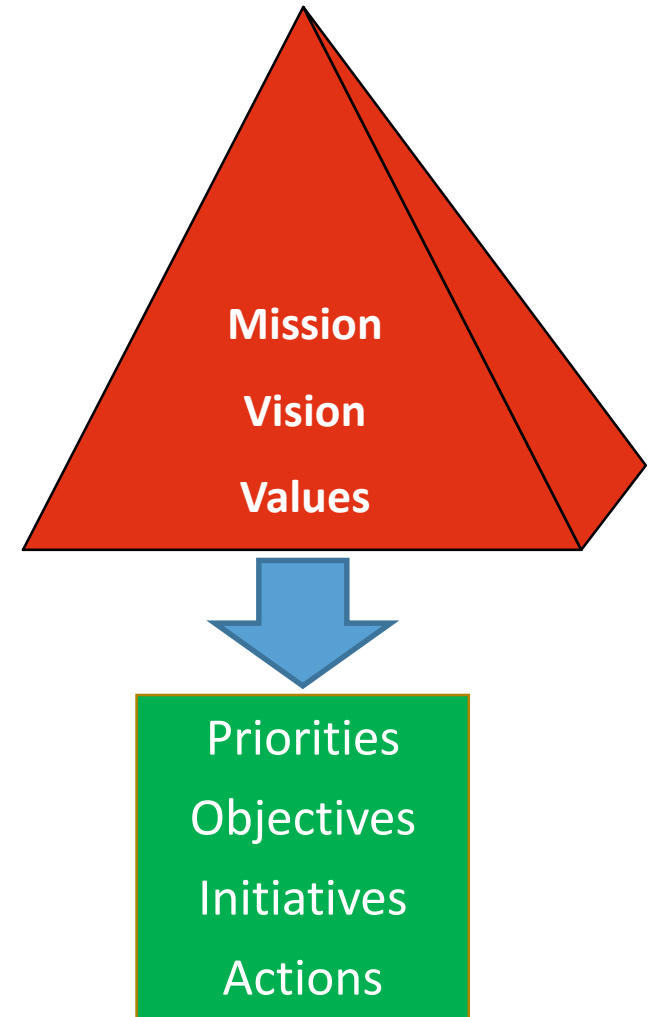
Actions

UNC College of Arts & Sciences – Mission Statement

Think. Communicate. Collaborate. Create.
…for meaningful lives.

Think	Cognition, connection, analysis, and reflection
Communicate	Written, oral, visual, and digital
Collaborate	Understanding of self, interacting with diverse groups and active listening
Create	Producing knowledge or its equivalent in performance and creative activity

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UNC College of Arts & Sciences – Vision Statement

Reimagining the Arts & Sciences for the public good

Reimagining	Striving for changes that will positively disrupt how things are done
Arts & Sciences	Strategically advancing the College and the value of a liberal arts education
Public	Fulfilling our destiny as the first public institution for NC and beyond
Good	Benefiting everyone

UNC College of Arts & Sciences – Values

Student Focus
Scholarly Excellence
Strategically Bold

Student Focus	Act for the good of students
Scholarly Excellence	Aspire to lead the world in research, scholarship, and creative endeavors
Strategically Bold	Adopt a mindset that reflects our strategy in daily decisions and works for courageous change

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3 Revised Strategy Statements

4 **Implementation Plan: Priorities, Objectives, Initiatives & Metrics**

Strategy Statements

Mission
Think. Communicate. Collaborate. Create. …For meaningful lives.

Vision
Reimagining the arts & sciences for the public good

Values
Student Focus Scholarly Excellence Strategically Bold

Proposed Priorities
1. Develop a modern, innovative, inclusive, and global **curriculum** 2. Expand high-impact and interdisciplinary **research** 3. Tell the **story** of the College of Arts & Sciences

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Implementation plan nomenclature

Priority – thing we do to live our mission and achieve our vision; first of mind; more important than other things; could be noun or verb statement

- **Objective** – A thing aimed for; goal/target that if accomplished would indicate significant progress on the priority

    - **Initiative** – summary statement of actions; usually lead with a verb

Priority 1: Develop a modern, innovative, inclusive, and global **curriculum**

Objectives and *Examples of Initiatives*

A **Reinvent General Education**

1. Develop a planning process and timeline for curriculum development and campus-wide review/approval
2. Identify key guiding principles based on current literature, national models of excellence, and key stakeholder input
3. Evaluate and prioritize knowledge areas and student outcomes for potential inclusion in the curriculum
4. Consult with a wide range of user groups on inclusiveness, implementation, and feasibility (e.g., students, faculty, advisors, registrar)
5. Develop an annual general education assessment plan for each included component
6. Provide the curriculum blueprint for review and critique by major campus review groups and implement new curriculum by fall 2019
7. Assess the functioning of the curriculum after one complete academic cycle

B **Reimagine the Humanities Ph.D.**

1. Create new, innovative graduate courses that integrate an introduction to the discipline and its methods with professional development activities and an exploration of public engagement;
2. Explore alternative formats to the monograph-based humanities dissertation (e.g. digital, interdisciplinary collaboration/team-based, etc.)

C **Expand and develop instructional methods based on evidence-based inquiry**

1. Maintain student focus
2. Increase instructor professional development about student learning
3. Leverage and integrate new technologies
4. Secure appropriate spaces
5. Introduce new ways of measuring student learning
6. Utilize predictive analytics

D **Generate interdisciplinary, experiential, and global learning opportunities**

1. Increase public and private partnerships for student learning
2. Expand credit and non-credit bearing global learning opportunities for all students
3. Provide interdisciplinary courses in hybrid (in-person-online) and other formats

Priority 2: Expand high-impact and interdisciplinary **research**

Objectives and *Examples of Initiatives*

A **Strengthen basic and applied research portfolio**

1. Identify top priority research expansion areas based upon department and center input
2. Leverage new strategic resource pools for key high-impact research

B **Harness interdisciplinary talent for addressing global issues**

1. Encourage opportunities/new structures that go beyond single departments for research
2. Measure and reward interdisciplinary grants, projects and major partnerships

C **Build adaptive research facilities**

1. Build new APS/Tech development building for translational research
2. Renovate Wilson Hall to improve animal model research and support flexible laboratories for biology.
3. Renovate Phillips Hall as a home for CoSMS Institute
4. Encourage and expand makerspaces, including app development space for students

D **Increase commercialization of research**

1. Notice and celebrate our successes
2. Build incubator space
3. Create college-level incentive for translating research
4. Build better database of "expertise", "facilities", and "capabilities" to connect with entrepreneurial networks

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Priority 3: Tell the **story** of the College of Arts & Sciences

Objectives and *Examples of Initiatives*

A | **Raise the national profile of the College of Arts & Sciences**

1. Promote innovative College research and teaching
2. Identify key graduate programs to raise the profile of to improve U.S. News ranking

B | **Create awareness at the local and State level of the role of the College as research entity, economic driver, and source of innovation**

1. Promote awareness of companies, start-ups, patents, products, nonprofits created by College faculty, alumni, students
2. Raise profiles of College institutes and centers working on "big problems"—environment, energy, water, racial/religious intolerance, social justice, and others

C | **Instill a culture of strategic planning and thinking that creates and shares the story of the College**

1. Complete College and Department level strategic planning
2. Raise awareness among faculty—and the greater UNC-Chapel Hill campus community as a whole —of strategies and research and teaching innovations and outcomes
3. Create more effective external communications channels to collect and promote College successes

D | **Raise $600M + for the college as part of the University's capital campaign**

1. Refine College campaign priorities
2. Engage volunteers and advisory boards
3. Prepare and launch mini-campaigns to highlight and secure support for key priorities

We will track and report key strategic metrics

Element	Description	Metrics
Mission	Think. Communicate. Collaborate. Create. For meaningful lives	Student satisfaction (net promotor) Faculty satisfaction (net promotor) Alumni satisfaction (net promotor)
Vision	Reimagining the arts & sciences for the public good	External review assessment of performance/alignment Annual faculty and staff survey
Priority 1	Develop a modern, innovative, inclusive, and global **curriculum**	Learning outcomes % adoption of modern teaching % initiatives completed % students with global credit bearing experience % students with internship/work experience % students with directed research % securing full time jobs/graduate school # cross listed/interdisciplinary courses % of students in cross listed/interdisciplinary courses
Priority 2	Expand high-impact and interdisciplinary **research**	$ total research grants awarded % faculty applying for grants # of new buildings % faculty in joint grants # publications # patents # licenses # start-ups # IPOs # STTRs/SBIRs

Priority 3	Tell the **story** of the College of Arts & Sciences	Rankings – national and international (e.g. US News, Kiplinger, etc.)
		$ raised from donors
		$ raised from corporate partners (for research and operations)
		% of strategic objectives and initiatives completed

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