

**Western Washington University
Board of Trustees
Agenda
June 10, 2010**

**Location: OM 340
Time: 3:00 p.m.**

**I. CALL TO ORDER
3:00 – 3:05**

2. SPECIAL REPORTS

**A. Roundtable Discussion: Strategic Planning and 2011-2016 State, Federal,
Campaign and Reallocation Agendas
3:05 – 4:30 Presentation: Bruce Shepard, President**

**3. EXECUTIVE SESSION MAY BE HELD TO DISCUSS PERSONNEL, REAL ESTATE
AND LEGAL ISSUES AS AUTHORIZED IN RCW 42.30.110
4:30 – 5:00**

**Strategic Planning and the 2011-13 (or, 2011-16?) Budget
Background for Board of Trustees Discussion June 10, 2010**

The Board desires to use Thursday afternoons of its regular, bimonthly meetings to learn about and discuss subjects that will, at future meetings, require action by the Board. Two interrelated subjects loom:

- The revision of the University's strategic plan during AY 2010-11
- The adoption of an operating budget proposal for the 2011-13 biennium

Looking ahead, both require full engagement of the Board. When it comes to strategic planning, the university has previously developed a strategic plan. We have learned much through the process and must now forge an approach that continues to most effectively meet the needs of the Board and the University for which it is responsible. When it comes to the 2011-13 budget, the Board must act at its following (August) meeting. Yet much remains to be known about that budget. Revenue forecasts are awaited, and, as of this writing, we have not yet received any direction from OFM on just what the 2011-13 budget proposals should include (and not include).

We see these two subjects as interrelated. Certainly, clear strategic direction must guide budgeting. But, it is also true that the great uncertainty surrounding the fiscal situation for 2011-13 can help inform our discussion of precisely what kind of strategic plan we would most benefit from developing.

We also see great value in involving the Board in a wholly unscripted discussion of these two topics, gathering around a table with Board members, vice presidents, deans, and other key campus leaders. That we will do on Thursday, literally all around a table so that we may actively and creatively engage, brainstorm, listen, and hear.

Revising the Strategic Plan

To stimulate and challenge thinking about what the university's next strategic plan might look like, President Shepard shared a blog with campus some weeks ago. That text is appended as background for the Thursday afternoon discussion.

The University Planning and Resources Council will, we expect, have a lead internal role in developing whatever strategic plan we decide to shoot for. We think of it as "the keeper of the process." The UPRC is the one group on campus where all those who comprise the university are represented. The UPRC has already had stimulating discussions about the nature of future

strategic planning, stimulated by the Bruce's Blog piece previously mentioned. Those discussions will continue.

These ideas seem to be emerging as necessary components of the next strategic plan if it is to offer meaningful help during a period of major change and great uncertainty:

- **A clear statement of the vision of what the university seeks to become.**
This statement incorporates aspirations. It does not replace our mission but, instead, addresses how the mission is to be best served given current and projected circumstances. It is also strategic in that sense: it follows from interpreting the university's enduring mission in the light of an analysis of external threats and opportunities and internal strengths and challenges.
- **Several overarching goals**
These establish two or three directions we intend to pursue. The goals follow from the vision and the strategic analysis of internal and external factors. They may be areas where we are furthest from where, given the vision, we need to be. They may address opportunities where concentration on our current strengths can most forcefully propel us toward the vision.
- **Fundamental strategies for reaching those goals**
Here, it is not specific "action plans" we are after. Those come later, at the level of tactical planning. At the strategic level, though, what key strategies are most likely to move us in the direction of the overarching goals?

Certainly, there is plenty to discuss concerning just the preceding three bullets. But, we must also work out, among other things:

- The processes by which the university, external stakeholders, and the Trustees are all involved in developing the strategic plan.
- The means by which the university-level vision, overarching goals, and fundamental strategies drive planning at other levels and are driven by planning and priorities at those levels – e.g., how do college- and university-level plans mutually interact?
- The ways in which more tactical planning (say, the specific provisions of the 2011-13 budget) are shaped by the elements of the strategic plan.

Lots to do. Fortunately, we have some time to figure it out. And, much background work has already been done that is directly relevant to the tasks at hand. Those background steps include:

- Building and regularly seeking to improve open, transparent, bottom-up, and accountable decision making processes

- Providing improvements in capacity to make *informed* decisions including: changes and new leadership in Institutional Research, improving the quality and accuracy of various data sets, bringing up a university-wide budgeting module, initiating cost-based accounting, and developing groups such as the UPRC and the Budget Offices Council with responsibilities to make sure we are acting in informed ways.
- Routinely building SWOC (strengths, weaknesses, opportunities, challenges) analyses at the university and planning unit levels as part of our budgeting processes.
- Developing, through engaging many groups, possible priorities to drive an upcoming comprehensive fundraising campaign.
- Researching and then reflecting upon what we are best known and valued for – by external audiences and by us – through the branding initiative.
- Listening to many diverse groups discuss Western’s future and future possibilities through the 100 Conversations.

The 2011-13 Budget Process

The University has been following its established process in developing the 2011-13 biennial budget, including bottom-up submissions, budget presentations, and most recently, meetings of the President, Vice Presidents and Deans to draft recommendations. While we have been told to expect a 2011-13 fiscal environment at least as challenging as the one the university has just been through for 2009-11, our strategy has been to think about what, additionally, we might do to better serve Washington. We are not being Pollyannaish here. Rather, we believe that it makes no sense going into 2011-13 with budget cuts in hand; as higher education is part of the solution and not the problem, we need to help Washington understand the opportunity costs of not sustaining investment in that solution. And, while focusing on 2011-13, we are in this for the long run; when the state’s finances turn around, we will be better prepared to serve Washington if, today, we are thinking as creatively as possible and building the relationships, partnerships, and strategies necessary to support those initiatives.

We understand that the 2011-13 budget proposal that the Board must adopt in August may bear very little resemblance to the actual 2011-13 operating budget that the Board will adopt a year from now after the legislature has acted. So, the 2011-13 proposal is a chance to dream a bit. The realities we will face when more is known from the legislature, and from the further development of our institutional strategic plan.

This leads to the realization that our usual biennial budget development process has certain things mostly wrong. First, it focuses on one biennium when our thinking and motivations, as earlier explained, must be longer term. Consider but one example: our capital budget plan is to be 10 years and is to be driven by academic planning. But, if our academic biennial

budgeting horizon is only one biennium, what is going to actually drive what? In response, we are proposing a “vertical” expansion of our budget thinking: a rolling, three biennium budget. Just as with a 10-year capital budget, we know that today’s ideas about what we should be doing with operating budget in 2016 will bear very little reality to what actually happens in 2016. But, to think in those terms allows us to better integrate and stage initiatives across biennia.

We also realized, as we have been working to develop a comprehensive fundraising campaign, create an agenda for federal funding, build capacity to seek foundation support, expand capacity for initiatives funded through entrepreneurial and “cost recovery” bases, and make internal reallocations, that the usual approach is far too limited in scope. All of these avenues need to be strategically driven and integrated. So, consideration of the operating budget must be expanded “horizontally” as well.

Think, then, of our strategic budget process as having the target of filling in the hypothetical Table in **Appendix I** of this document.

Our Roundtable Discussion

If the foregoing thoughts on planning and budgeting make preliminary sense, then the following are all important topics for our exploration:

1. What preliminary thoughts should shape our vision for Western?

To stimulate our thinking, we have available:

- Our current strategic plan (copy included with Board materials)
- A summary of initial findings from the 100 Conversations
- The findings from the branding initiative

2. What overarching goals would move us in the direction of that vision?

To stimulate our thinking, we have available:

- Again, the summary of initial findings from the 100 Conversations
- Our current strategic plan
- A synthesis of the many ideas developed during research on the key components of our capital campaign

3. What fundamental strategies should we rely upon to achieve the overarching goals?

These follow from answers to the preceding two questions and, for purposes of illustration, might include:

- Protecting and enhancing the high quality of the Western undergraduate experience as the defining element of what we are most fundamentally about: today and tomorrow, in and out of the classroom, on or off our campus.
 - Earn a sense of ownership across Washington as a publicly purposed, premier, national destination (rather than regional) university.
 - Earn a sense of ownership internally through open, transparent, accountable decision making.
 - Be exemplary “stewards of place” by helping to lead and care for the communities we call home.
 - Partner, partner, partner.
 - Measure achievement by being the model – whatever part of the university we are talking about – that others around the country seek out to emulate, copy, and follow. Consequently, pursue relentless innovation (and be prepared to sometimes fail).
 - In the “new normal” fiscal environment, and as a consequence of moving from public to “publically purposed,” expand and integrate resource allocation discussions and plans vertically (across a rolling three biennia) and horizontally (across all sources of potential support).
4. What specific proposals should, then, become a part of the budget proposals for additional funding, budget proposals for funding through reallocation, components of the campaign case statement, elements of the federal agenda, possibilities for foundation support, and activities supported through entrepreneurial and cost recovery mechanisms?

Here we have available to stimulate discussion:

- Proposals that were generated through the routine 2011-13 budget building process
- Components of the ideas brought forward as part of preliminary planning for the comprehensive fundraising campaign
- Our recently developed federal agenda

The sections that follow do reorganize some of what has been done to date under the rubric of the preceding four questions. In these materials, do not look for answers. The roundtable discussion is intended to move us in that direction. What you will find, though, are various and assorted proposals, ideas, inferences, and possibilities. While all have come from the bottom-up, none has been fully considered by the entire campus. That’s what the efforts to revise our strategic plan should yield over the year ahead, beginning with our discussion today.

Overarching Goals: Four Potential Campaign Themes

I. Changing Lives in P-12 Education

Western will lead Washington's reform of education in mathematics, science, and the arts, expand our successful model for recruiting and retaining teachers of color, and place priority on early learning, English language learning, and bilingual programs.

Resources to be developed: capacity building, program expansion, faculty support, scholarships

Teach Washington: Western Takes the Lead to Transform K-12 Education

With the oldest – and best – teachers' college in the state, Western's roots are in teaching and serving the communities of Washington. There is also an opportunity to leverage federal dollars in pursuit of this goal: the National Science Foundation has invested over \$12 million in the Olympic Partnership for math and science, which has dramatically improved WASL test scores in its first three years.

Relevant New Initiatives proposed for the 2011-2013 Biennial Budget:

- Teach Washington
- ELL-Bilingual Education (TESOL)

II. Changing Lives in Business and the Not-for-Profit Sectors at Home and Abroad

Western will embrace a campus-wide commitment to develop superior programs in leadership, entrepreneurship, and ethics by providing students with opportunities to participate in applied problem-solving in the community, social entrepreneurship ventures, and internships and projects for businesses and human services.

Resources to be developed: capacity building, program expansion, faculty support, scholarships

Leadership and Entrepreneurship

One of Western's highest priorities is to collaborate with the community to create possibilities for students to activate their potential and to "give back." We believe that all students can develop their leadership potential and use their talents to drive change, solve problems, and transform lives.

Employers consistently say that it is often a Western grad that makes the difference in getting a problem solved at work. Western graduates are known for being immediately

“work ready” and effective because of their classroom and out-of-classroom experiences at the university. Starting and running clubs and organizations, internships and class projects for area companies, and service learning projects are but a handful of the opportunities available for students.

Leading with a Global Perspective

In today’s society, students must develop an inherent global competency and the ability to work with people from other countries and cultures. Western seeks to prepare graduates to be global citizens, ready to solve problems that transcend borders. In addition to the traditional study abroad programs, Western plans to infuse the curriculum across the campus with a global perspective, develop unique partnerships with international businesses and organizations to create internships and service projects, and create opportunities for international performers, practitioners and faculty to “teach in residence” at Western itself, or virtually, through technology.

Relevant New Initiatives proposed for the 2011-2013 Biennial Budget: N/A

III. Changing Lives by Inspiring a Different and Sustainable Future

Science, Innovation and Technology

Western’s record of leadership in developing visionary and sustainable ways of thinking, and ways of doing, is exemplary. First in the nation 40 years ago with the establishment of Huxley College of the Environment, first in the Northwest to sign the President’s Climate commitment, and first in the country to power its campus with 100% green energy, Western is now among the first to integrate the study of renewable energy science and environmental policy with the green economy. And a decades-long signature program for Western, our Vehicle Research Institute, is changing lives in Washington through new energy efficiencies such as bio methane-fueled public transportation. Western’s leadership in the green economy has already resulted in lessening the carbon footprint of businesses in Whatcom and Kitsap counties, and our plans call for leadership in restoring the North Puget Sound, and beginning a demonstration site in biomass technology directly on campus in 2010.

Western’s leadership in a green economy can extend into an emerging focus on new media and the multiple ways students are learning to communicate and use technology.

Relevant New Initiatives proposed for the 2011-2013 Biennial Budget:

- Fisheries project partnership between WWU and Bellingham Technical College

- Water and the environment/Coastal waterways/polar ice cap research/institute for watershed studies
- Interdisciplinary degree in renewable energy
- Next steps for AMSEC and BRAIN programs?

Resources to be developed: capacity building, program expansion, faculty support, scholarships

IV. Access and Outreach to Underserved Populations

Sustainability is also about inspiring people and imagining a different future.

Western has a successful history of reaching into the community to encourage students of color to see themselves in college and at Western. From financial literacy workshops in middle and high schools to on-campus enrichment programs, and opportunities aimed at students who “stopped out” before graduating, new resources developed for outreach will fund capacity building, allow faculty development of programs and curriculum, and allow students to participate at every level through scholarship assistance.

Relevant New Initiatives proposed for the 2011-2013 Biennial Budget:

- Compass 2 Campus
- Northwest Consortium – Veteran’s Programs
- Pathways to Success/Destination Graduation
- Western in Two
- ELL – Bilingual Education (TESOL)

Overarching Goals: *Feedback from 100 Conversations*

Six general themes emerged from the notes taken during the 100 Community Conversations. Below is an overview of these categories including a summary of shared perceptions, telling quotations and representative questions asked by participants.

Six Major Themes

Campus-Community Interrelationship:

The most common refrain heard in the 100 Conversations was that community members want to interact much more than they do with members of the campus community. They want to participate in campus activities and they want to gain from the expertise and energy of University members.

“I’ve lived in Bellingham for 15 years and Western has always seemed like it is just on the hill.”

“Institutional resources should be accessible to community members whose taxes contribute to its support.”

- What can WWU do for the public?
- How can WWU lead the community forward?
- How is WWU making a difference in WA? The region? Beyond?

Communication and Marketing:

The second most frequently occurring category of comments called for more detailed and broad-based messaging about what is happening at WWU. Community members expressed a sense of pride in WWU, but often did not know what specifically WWU is doing that grounds that sense of pride. They wanted to see more details of what’s working at WWU; they wanted to feel part of Western’s successes by at least knowing more about them.

“It’s sad the word hasn’t gotten out—WWU is a hidden gem.”

“What are your strengths? I’ve lived here 7 years and I don’t interact with it.”

“You say Western wants success, but I’m not sure what that looks like.”

- What is our best story to tell?
- What is the WWU brand?
- How might Western’s homepage be redesigned to communicate more effectively?

Relationships and Interaction:

This set of comments calls for attention to personalized instruction, relationship-building, and human interaction. Parents often pointed to the faculty/staff-student interaction as high on their list of desirable traits in a Western education and worried that increasing class size would change that possibility; employers said they want to hire graduates who have strong interpersonal skills. In a number of sessions, the greatest emphasis was on building personal relationships; several alumni said they would like to be virtual mentors.

“Western functions like a private school—small classes and connections—don’t want to lose that.”

“The brand of Western is ‘growing the individual’.”

- How to maintain student connections with more students and fewer faculty?
- How well is WWU tracking alums and building relationships?

Inclusion and Access:

These comments point to an interest in several kinds of issues: ensuring that diverse groups including lower socio-economic students get into college, making Western even more supportive of non-traditional and under-represented students, enabling all students to move more smoothly and expeditiously through their degree programs, and even opening up more opportunities for community members to take Western courses.

“Being a publically-purposed university means being accessible financially, physically, and socially.”

“Compass2Campus is a great way to help first generation and lower income kids see that college is possible for them. Why not extend the model to students of color?”

“Recruiting students of color requires different strategies than recruiting the general population.”

- How to protect students from lower socio-economic situations as tuition rises?
- What does a publicly purposed university look like for students of color?
- How to sustain a genuinely welcoming, safe campus both physically and emotionally?
- How to promote more interaction between the diverse individuals/groups we have?
- How can the community access campus resources/activities when parking is so difficult?

Curriculum:

Comments in this category address specific suggestions for ways to enhance coursework and degree programs in ways that will more directly benefit the community/public good. In particular, participants mentioned more attention to teaching cultural competency and global awareness not only by offering opportunities for international travel, but also by studying other cultures and languages. Some voiced a desire for interdisciplinary studies. Business representatives urged sustaining a broad liberal arts foundation while fostering professional skills, perhaps integrating the two. Many parents said they expect their sons and daughters to receive both the credentials and the knowledge and skills to gain employment and be successful. A number quite pointedly called for reducing time to degree/offering more opportunities to count internships toward degree requirements.

“Academic programs should drive and inspire community partnership initiatives.”

“Stop measuring the time to degree in 6 years!”

“Students need to come out of school running – fully ready and prepared for business.”

- Why does it have to take 5 years or more to finish? Why not reduce credits needed?
- How to stay the course of a strong liberal arts education and respond to external pressures and budget cuts?
- What about a model so students can choose various paths of general ed requirements?
- How to integrate coursework with experiential learning?

Innovation:

While this category of comments represents the smallest in terms of number, calls for greater inventiveness are implicit in many comments grouped in other categories as well. Participants urged being entrepreneurial in the long-term, taking greater risks in creating new alliances and expanding signature programs, while retaining existing quality programs. Many saw sustainability as a natural path for being innovative. A number applauded the Compass2Campus program and urged expanded versions of student-to-student mentoring at WWU.

“Offer classes after hours and downtown – to help revitalize downtown.”

“Sell dorms to private companies.”

“Cater to the growing retired population in Bellingham.”

“Organize alumni to lobby and fundraise.”

- Would it be possible for a business to pay for a course or a series of courses?
- Could WWU charge higher tuition for some programs? Could WWU charge lower

tuition for early morning/evening courses and higher tuition for prime time courses?

- Could a CBE partnership with Huxley help to develop grants for sustainability?
- To what extent can Western be an active partner in developing the Waterfront?

100 Conversations vs. Olympia

There were significant disconnects between what we heard in the 100 Conversations and what we've heard from Olympia regarding the expectations of the state's universities. Consider the contrasting responses to the following question: Why is the state in the business of providing baccalaureate education and what does it expect from universities?

| | <u>Heard in 100 Conversations</u> | <u>Heard in Olympia</u> |
|--------------------------------|---------------------------------------|----------------------------|
| Student needs | Develop Full Human Potential | Workforce Development |
| Employer needs | Problem solving, flexibility, empathy | High-tech fields |
| Higher education priority | Part of the solution | Social needs |
| Accountability | For Results | For means |
| Six universities must | Be adaptive, entrepreneurial | Adopt uniform requirements |
| Efficiency | Control costs | Control tuition |
| Access for growing populations | Four-year | Two-year |

New Initiatives Proposed for 2011-2013 Biennial Operating Budget

Following the established budget process for the 2011-13 biennial budget (which the Board acts upon in August), there have been bottom-up submissions, budget presentations and, most recently, meetings including the President, Vice Presidents and Deans to draft recommendations. At the same time, a conversation has been taking place on campus about just how to revise the strategic plan to look beyond the next biennium into the more distant future. As part of this conversation, a request was relayed to planning units throughout the University for new initiatives.

A total of 36 proposals were received, and subsequent discussion in meetings of the University Planning and Resource Committee (UPRC), Deans and Vice Presidents reduced that number to 14. There were several criteria used in making those determinations:

- Should the proposal be part of the budget for this biennium?
- Is the proposal developed enough to be pursued now?
- Is state funding the best model to pursue?
- Is the proposal better pursued through enabling legislation rather than operating budget requests?

These are the 14 finalists for new initiatives, with brief descriptions of each on the following pages.

- 1. Marine Science Public Education Initiative**
- 2. Focus in Marine Science Undergraduate Program Initiative**
- 3. Clinical Doctorate in Audiology**
- 4. Clinical Doctorate in Physical Therapy**
- 5. TeachWashington**
- 6. Management Information Systems (MIS) High Demand**
- 7. Entrepreneurship and Technological Innovation**
- 8. Compass 2 Campus**
- 9. ELL-Bilingual Education (TESOL)**
- 10. Pipeline Program for Under-Represented Students Interested in Careers in Law & Justice**
- 11. Preparing Future Science Faculty for the Community Colleges**
- 12. Northwest Consortium of Higher Education (NWCHE) – A Shared Model to Veterans' Needs**
- 13. Western in Two (Transfer Access and Transition)**
- 14. Pathways to Success**

1. Marine Science Public Education Initiative

On January 1, 2010 the Shannon Point Marine Center (SPMC) implemented a *Marine Science Public Education Initiative* whose objective is to increase the level of ocean literacy among the general population and to inform local citizens about the research programs being conducted by WWU faculty. Target audiences include K-12 students and teachers, community college students and faculty, staff at informal science education institutions and general public audiences. The approach is two-fold: (1) to produce and present talks and audio-visual presentations on significant marine-related issues that have penetrated the public consciousness (effects of global climate change on fisheries production and ocean acidification, harmful algal blooms) and to translate the scientific research being conducted at SPMC in a manner that can be understood and appreciated by the general public.

The initiative was implemented in January 2010 on a temporary basis, funded by a two-year donation (created by a legal settlement for clean-up of Anacortes Harbor) and a three-year NSF grant to support participation in the Centers for Ocean Science Education Excellence (COSEE) with the University of Oregon (COSEE Pacific Partnerships). These funds will support two one-half time Exempt Professional staff who will carry out the objectives of the initiative. The proposed initiative will provide permanent funding to assure that this program will continue uninterrupted after the present grant/donation funding ends.

2. Focus in Marine Science Undergraduate Program Initiative

The proposed initiative addresses a specific opportunity provided by the very sound approach that the Biology Department takes by having students major in Biology, with an area of *specialization* in marine biology. Presently, however, most of the focus on marine science does not occur until the junior year. To promote the recruitment opportunities for top student prospects inherent in a focused program in marine science, the proposed initiative will implement an innovative learning and training opportunity for students in a manner that will attract them to WWU to pursue the marine science specialization in the first place. The program will then continue to whet their appetites for marine biology during their first two years, while permitting unfettered progress toward their degrees as they eventually enter the existing marine specialization structure within the Biology Department. Any such program should be sufficiently bold and innovative so as to be an effective recruitment tool.

3. Clinical Doctorate in Audiology

There is a growing awareness of, and interest in, audiology as a profession. *U.S. News and World Report* recently listed Audiology as one of the “Best Careers in 2009”. Every year at least 10 of our undergraduate students in CSD indicate an interest in pursuing graduate level education in audiology by completing an undergraduate minor and/or by applying to clinical doctoral programs elsewhere. Currently the Speech and Hearing Sciences Department at

University of Washington offers the only clinical doctoral program in audiology in Washington State, typically receiving 85 applications for the 12 positions each year.

Proposed is a clinical doctorate program in audiology that meets the 2007 certification standards of both the American Speech-Language and Hearing Association (ASHA) and the Council on Academic Accreditation. In the past WWU offered an audiology graduate degree at the master's level. Given that the entry-level degree is now a clinical doctorate, WWU had to place our graduate level curriculum in moratorium in 2005. Legislation will be required to seek authorization to offer a clinical doctorate in audiology.

4. Clinical Doctorate in Physical Therapy

Proposed is a new program, with a recommended enrollment of 30, offered at the clinical doctorate level. The degree would be a doctorate in physical therapy (D.P.T).

There is high student demand for physical therapy programs. In 2008 there were 382 applicants for 32 spots in the DPT at the University of Washington and 255 applicants for 38 spots at Eastern Washington University. Another indication of student demand is the interest by current Western students in pursuing physical therapy as a career. Over 100 freshman students annually identify pre-physical therapy as an interest area and there are approximately 120-150 students who in the pre-physical therapy specialization of the Kinesiology major in PEHR. Legislation will be required to seek authorization to offer a clinical doctorate in physical therapy.

5. TeachWashington

Building upon the existing close collaboration between the College of Sciences and Technology and the Woodring College of Education, the TeachWashington initiative proposes to increase the quantity and quality of science and mathematics teachers at all levels (K-16) graduating each year from Western Washington University. The TeachWashington program will build on Western's already nationally recognized programs to:

1. Double the number of high quality secondary mathematics and science teachers graduating each year from approximately 50 to 100,
2. Enhance Western's programs to produce a new cadre of exceptional teachers prepared to meet the needs of middle school students,
3. Increase the focus of our elementary programs on preparing teachers ready to effectively teach mathematics and science to all students.

A secondary goal of the TeachWashington program will be to serve as a model and proactive partner with other institutions and organizations in the state to help meet the critical need for excellent mathematics and science teachers identified in *Washington Learns*.

6. Management Information Systems (MIS) High Demand

As is the case with MIS programs across the United States, enrollments for WWU's Management Information Systems (MIS) program have not responded to recent increased industry demand for MIS-related jobs, many of which are going unfilled. The current and future demand for MIS-related jobs is also reflected in the most recently published "The 30 fastest-growing occupations (2008-2018)" report from the Bureau of Labor Statistics, which indicates that three of the nine occupational titles for those with Bachelor's degrees are in the MIS-related area. Although some technical jobs are being outsourced, the types of jobs that WWU's MIS graduates typically perform (e.g., systems analysis, consulting, project management, etc.) require close collaboration with the end-user community and are not being outsourced. It is thus expected that demands for MIS-related jobs in our region will continue to be strong.

One method of ensuring that employers will want to recruit WWU students is to differentiate the MIS degree at WWU from others in the state and region. This will allow employers to have confidence that WWU students will be of high quality and meet their needs. To differentiate the WWU MIS program, the development of a **BS in Information Systems** is proposed to replace the current BA in Business Administration with a concentration in MIS. This would still include a significant business component, but would add more IS classes to conform to the national model for IS degrees.

7. Entrepreneurship and Technological Innovation

Technology drives much of the entrepreneurial activity across the Northwest, especially high value-added activity. Many prospective entrepreneurs and existing businesses want to use advanced technology in their efforts, but do not have and cannot afford such technology and expertise.

With the growing number of philanthropically-oriented millionaires generated by growth in the technology sector, *social* entrepreneurship is also an increasingly important aspect of the Northwest economy and quality of life. Those with ideas that fit the social entrepreneurship model need similar access to expertise as those looking to use technology in a more traditional entrepreneurial environment. In both cases, the opportunity exists to help students, faculty, and the public become educated about the entrepreneurial process, as well as to connect entrepreneurs with resources, both physical and human.

Leveraging current institutional strengths in the College of Business and Economics, and the College of Science and Technology, as well as partnerships established with government and private sector partners in the Northwest Consortium for Technological Innovation (NCTID), it is proposed that Western's College of Business and Economics develop and implement a minor in entrepreneurship open to all WWU students. The minor would include an initial course in entrepreneurship, courses in entrepreneurial marketing and capital acquisition, and a capstone business plan course. Electives in social, environmental, and corporate entrepreneurship, and management of innovation, would also be offered. The Social Entrepreneurship dimension of

this program will teach the skills of composing business plans and leadership skills to those who will lead and advise non-profit and community organizations.

8. Compass 2 Campus

Compass 2 Campus is an early outreach/pipeline program designed to increase access to higher education through mentoring and academic tutoring for 5th-12th grade students from traditionally underrepresented and disadvantaged backgrounds. As participants in the program, the youngsters visit WWU as fifth graders and then continue to receive mentoring and academic tutoring from WWU students until they complete high school. Compass 2 Campus benefits public school students by encouraging school attendance, setting aspirations for graduation from high school, increasing awareness of life options, and inspiring dreams of a higher education. As a university-wide program, Compass 2 Campus benefits WWU students by connecting their learning to life through community service, developing leadership and communication skills, and encouraging professional and career interests. Because Compass 2 Campus includes an academic component in which WWU students enroll in courses for credit, the program yields approximately 40 FTES per academic year. This proposal requests support for 40 FTE in 2011-2012.

Participation in Compass 2 Campus will grow significantly as school districts advocate for access for more of their students in need of academic support and mentoring and as we prepare for a new cohort of fifth-grade students who will begin the program in fall of 2010. The continuing success of Compass 2 Campus demands the development of an infrastructure to support the current and emerging scope of the work. Furthermore, Washington policymakers and legislators look to WWU for leadership in developing a research-based early outreach, P-12 pipeline program that can be replicated across the state.

9. ELL-Bilingual Education (TESOL)

Many districts in the state of Washington report significant difficulties in recruiting teachers qualified to teach students with limited English proficiency. According to the most recent *Washington Educator Supply and Demand Report* issued by the Professional Educator Standards Board, bilingual education and teachers of English Language Learners (ELL) top the list of teaching areas with a shortage of qualified teachers. Of the total number of school districts in the state, 83 percent report they are unable to recruit and hire qualified ELL and bilingual teachers.

While Western Washington University is among the top two producers of P-12 teachers in the state of Washington, our program to prepare bilingual and ELL teachers has reached capacity. To address critical state shortages of teachers of English Language Learners (ELL) and teachers in bilingual education, Western Washington University proposes to increase enrollments in our TESOL program (Teaching English to Speakers of Other Languages) by 40.00 FTE for 2011-2012 and an additional 5.00 FTE in 2012-2013 (45.00 total in 2011-2013).

10. Pipeline Program for Under-Represented Students Interested in Careers in Law & Justice

There is a shortage of minorities and other under-represented groups in the legal profession in Washington State, the members of which play an important role in its prosperity and politics. Western's Center for Law, Diversity and Justice at Fairhaven College proposes to reverse this trend by further developing a vigorous high school recruiting program that offers a rich and relevant program of learning. This goal can be promoted by adding to a summer outreach program to the Center for Law, Diversity, and Justice to serve and attract high school students interested in obtaining a four-year degree. Another primary goal will be to interest students who currently are not considering pursuing a college degree in careers that employ legal skills and knowledge.

Proposed is a summer College Qwest-type program with short courses that will appeal to high school students, such as "Street Law", or the "Criminal Justice System", or "Drug Use Law," or "Free Speech in High School", and so on. Secondly, we would sponsor and coach mock trial-teams, as well as organize moot court contests for high school pre-law programs. We also would host a state-wide high school pre-law student leadership conference each year.

11. Preparing Future Science Faculty for the Community Colleges

The goal of this proposal is to develop a new, potentially transformative model for the preparation of future science faculty for Washington State Community Colleges. This is accomplished by integrating (a) the strong disciplinary preparation required for earning a Master's degree in the sciences, including the requirement of a thesis or project; (b) the pedagogy of science education and assessment of science learning and the pedagogy of adult learning; (c) the design, development and effective use of E-learning; and (d) the use of cyber-enabled laboratory instrumentation. Students participating in the program will also complete internships, teaching science courses in a community college under the mentorship of community college science faculty members.

12. Northwest Consortium of Higher Education (NWCHE) – A Shared Model to Veterans' Needs

The Northwest Consortium on Higher Education (NWCHE) was formed in the Fall of 2009 to address a growing set of issues in higher education that are best served through a collaborative approach. NWCHE is comprised of 7 institutions, which include Western Washington University, Whatcom Community College, Bellingham Technical Institute, the Northwest Indian College, Skagit Community College, Everett Community College, and Olympic College. The consortium has met throughout the fall and winter to identify areas of possible collaboration and has identified three topics where NWCHE will direct attention: services to Veterans, international initiatives, and marine/water conservation.

NWCHE members recognize that Veterans bring their strength in leadership training and service values along with their military work experience back to civilian life. Their enrollment in higher education is growing rapidly with schools seeing increases of 30% or more from one year to the next. In addition, these students may also be first generation, low income and from diverse backgrounds. Attending to their transitional needs is essential to ensure retention and academic success of this population.

NWCHE is developing a shared model in which the needs of Veterans can be met, both individually and collectively, by drawing on shared programming, consultation and training. The details of this package are being developed jointly and will emerge in concert with meetings among consortium members this spring.

13. Western in Two (Transfer Access and Transition)

A majority of transfer students at Western experience significant transitional needs. Roughly two-thirds of entering transfers are undeclared or unable to immediately enter their major of choice. Institutional data at Western shows that the later a student declares a major, the longer it takes for them to receive their degree. This has significant implications not only for students' academic success, but also for their loan indebtedness levels. In addition, because of the wide range of ages, educational experiences and cultural backgrounds, transfer services and programs need to reflect a number of different approaches, learning styles and a variety of formats and delivery methods in order to insure that these students graduate on time.

The proposed package seeks to facilitate intervention with transfer students prior to enrollment at WWU to ease their transition to Western, reduce student loan indebtedness, and facilitate their timely path to graduation. This would be accomplished through: (1) increased collaboration and coordination with Western's top seven "feeder" community colleges and NWCHE member schools; (2) coordination of a multi-faceted communication plan (e.g. interactive transfer credit articulation module, web, e-mail); (3) financial aid intervention and advising to reduce student loan indebtedness; and (4) cohesive, targeted academic and career advising to ensure timely declaration of major, academic success, and graduation.

14. Pathways to Success

There are currently a variety of obstacles to students completing their degrees. Students may be working too many hours; they may have personal, family, health, or financial problems; they may be delayed because they cannot enroll in the courses that they need to graduate; or they may be delayed because they are unsure of what major to declare and how to effectively plan to complete requirements for the major. All of these may contribute to delayed progress or departure from Western before graduation.

This proposal seeks to promote the efficient graduation of Western students by providing outreach and intervention to students who have left Western in good academic standing prior to degree completion, encouraging and enabling them to return to the university and

successfully graduate; increased support services to ensure the graduation of students with disabilities; and increased support services to address students' mental health issues that may interfere with their academic performance.

Appendix II: President Shepard's May 5, 2010 Blog on Strategic Planning

What is the current role of Western's strategic plan, and where are we going with strategic planning?

Background

Last week's blog explored the "100 Conversations": background, some of the findings, and the role of the effort in our widely shared responsibility to lead Western. Friday of that week, we made the first public report out on preliminary findings. The event was held in Seattle and preceded our always-sold out and 13th annual Seattle Business Forum and fundraiser for scholarships. And, in what was really "Conversation 101," this warm up to the Forum sought additional insights from the almost 200 Western Advocates there assembled.

Now, you likely know that I am a big fan of listening. And, hearing. I think we should treat with skepticism anybody who arrives with all the answers. We must ask tough questions as well. For example, Why should the state be providing baccalaureate education and, if it does so, what should the expectations be for Washington's universities?

That was done last Friday. We must also explore issues that others seem too often too timid to forcefully raise. We did that last Friday, as well. With legislators joining us, we provided background on and then sought advice concerning discrepancies between what we hear in the 100 Conversations and what we hear in Olympia. Three examples that we took head on:

- With the state's need most clearly for additional baccalaureate capacity, why in Olympia is the emphasis solely on a much more narrowly construed "workforce training?"
- Unlike any other state in the nation, Washington spends more on two-year education than on baccalaureate education and, with the state's greater unmet need in the area of baccalaureate education, isn't it time to reverse that trend?
- With all the evidence we find listening to our alums that the need is to prepare people for careers not yet known and societal challenges not yet evident, why is the state only funding additional baccalaureate capacity in high-tech areas?

Listening and hearing and questioning. All critical. All must continue. But, we also reach a stage where it is time to make choices and to set clear directions. We are at that stage now. And, that is what strategic planning is usually thought to be about. This is opportune for Western has a strategic plan and it soon will be time to update it.

What follows is written for those who will take the lead in developing our strategic planning process: the UPRC, certainly. And, since they are fully responsible for and accountable for our goals and objectives, our Trustees. Others may wish to sign off now.

Challenging the Usual Approach

What follows may seem critical of some of the ways in which Western has proceeded in strategic planning. Probably some truth in that. After all, questioning, challenging, critiquing is central to how universities must progress. That is part of all of our jobs: critical, but constructively so.

I have no panacea I am trying to sell. I do believe, though, that by questioning the status quo approach, we may come up with something better than any of us could have initially imagined.

I have to be careful here for I have studied planning by government bodies, particularly as it relates to natural resource management most; have lead a number of strategic planning efforts at several universities; and even spent a year in D.C. working full-time with the USDA Forest Service as they sought to implement some then brand new planning legislation.

Much of the time I have spent studying, thinking about, and doing strategic planning has been spent trying to understand why most strategic planning fails: sometimes spectacularly, more often with a whimper as a president, CEO, or legislative champion comes or goes. In pondering that question, I have, I hope, learned something along the way. So, I will touch upon that personal, intellectual journey as I explore the topic of strategic planning.

Planning and Politics

Not true in other cultures but an aspect of American politics is our desire to turn political issues into matters that can be amenable to technical, “scientific,” “objective,” formulaic or mechanical resolution. We hate conflict and abhor politics. Think city manager movement; think endless (and largely ineffective) presidential task forces and commissions. We often throw around terms like “safe,” “sustainable,” “pollution,” and even as fundamental a term as “life” as though they were technically definable terms amenable to scientific answer when, in fact, they are, unavoidably, value judgments.

And, how do we take individual value judgments and, from them, hammer out societal policy choices? Science is not up to that task for those are not scientific questions. Up to the task or not, that is what politics is about.

Think the benefit/cost analysis tools our economist colleagues have so carefully and thoughtfully developed for us. Some years ago, an economist colleague did a benefit/cost analysis of three options for a pending Army Corps of Engineers harbor development project. I recall his angrily telling me, one day, that the Corps had not picked the option that his very thorough and entirely competent analysis projected as having demonstrably the best societal benefit to societal cost ratio. He did not like my reply: “Societies do not get benefits and pay costs; people do. Your analysis says nothing (and can say nothing determinative) about the fundamental political question: who will get the benefits, who will pay the costs. Politics answers those questions. You cannot.”

And there is the rub. As I studied the many federally mandated planning efforts that emerged in the 70's, the dynamics were obvious. With several natural resource agencies facing enormous political controversies, Congress ducked the political hot potatoes (as it always does) and responded with direction to plan. The resulting efforts did open up decision making and resulted in enormous mountains of data and decades of court challenges. But, the underlying political controversies still were there. Politics is rarely entirely zero-sum but there almost always are, nevertheless, winners and losers. Or, stalemate. The planning processes were not up to the task at hand. They cannot, as merely technical determinations, specify winners and losers. They tried mightily to do so, pretending that matters like "carrying capacity" are scientifically definable rather than being value choices and that matters like preferred harvest practices can be determined by the best forest science (rather than by listening to people). Stalemate became the word of the day. And the year. And the decade.

Why did Congress direct planning? Because, they understand the most fundamental of all political principles (besides "duck hot potatoes"): if people can first accept a decision making process as legitimate, they are more likely to accept the resulting decision as legitimate. That, by the way, is why we have worked so hard at Western to have open, transparent, and bottom up budgeting and planning processes. And, why we must work to continually improve those processes.

The result for the areas I was studying? When introducing the topic in my Environmental Politics course, I would confront my students – some preparing to be planners -- with the assertion that, in government, the political role of strategic natural resource planning is not to make better decisions; rather, it is to make decisions look better.

Strategic Planning and Universities

Let's turn to universities and strategic planning, keeping those various thoughts in mind.

My first hands-on experience with university strategic planning came many years ago at another university when I was asked to lead the first of what were to be biennial revisions of the recently adopted strategic plan. That plan had been developed with more task forces than I can remember, two years of study, endless open meetings, hearings, and the like. As I recall it, there were, organized under a dozen goals, almost 500 objectives, and actions included in the final plan. The resulting publication was very impressive.

That is normal in any first plan. Remember our cultural abhorrence of politics. Anything anybody pushes gets included. And, as academics, we are masters at finding words to paper over (and leave unresolved) substantive differences. Such plans do create many benefits. But, the result is not a plan. I call it "agenda setting." Basically, it defines the range of topics it will be legitimate to consider in future decision making.

Still, choice is necessary. I remember, when taking on the assignment to lead the revision of that first plan, sitting in the president's office and explaining the foregoing. We had an agenda

for discussion but no direction for next steps. The president disagreed. He pulled his copy of the plan from a shelf near the desk, clearly dog-eared and, so, well used. He showed me the items; among those nearly 500 that he had circled in red and that were the “next steps” for the university. Choice must be made; it had been made by the president. They were likely the right choices. But had anybody else glimpsed his marked up copy of the plan?

Western’s Strategic Plan

Think Western’s strategic plan. I was not here when it was developed. I would rate it as significantly better than most initial efforts, certainly superior to that one I was asked to help rescue decades ago. Western’s plan has, by my count, 11 goals with 52 objectives organized under them. And we use it. In all our budget processes we ask that proposals be explained in terms of the strategic plan. However, I think we would be hard-pressed to find anything any of us here might like to propose that could NOT be hung on some goal-language somewhere in the plan. That’s, again, what I mean by being “agenda setting.”

I have a more serious concern – as an academic studying strategic planning, as a president seeking to serve you. How many of those 11 goals in your university’s strategic plan can you name? When it comes to those 52 objectives, can you identify (without looking) those that account for and guide your professional contributions to the university? Are any, because they are a part of our agreed to strategic plan, shaping the day-to-day decisions you make about how to invest your talent, time, energy?

I have sometimes imagined the shared leadership challenge in university environments as that of our, together, producing a coherent symphony while we each are talented soloists. In theory, traditional strategic planning could do that, I suppose. And many universities try, adding in timelines, persons accountable, report dates, resource requirements, and the most favored term of all: “metrics.” Yet none of the traditional approaches I have seen (and one or two I helped put in place) survived a change in administration.

Why? Many reasons but here is one to be worried about if we want to adhere to the traditional strategic planning approach. Since none of us really know the ins and outs of our existing plan (UPRC members excepted) for it is both too broad and too detailed, to make that approach work would require fairly heavy top-down accountability and control. Such administrative practices are not only anathema to our culture, they can vitiate one of our great organizational strengths: 2,200 colleagues, 14,500 students, countless alumni, donors, and community friends – all bright, creative, talented, motivated. Further, we above all others can model being a learning organization: tomorrow’s efforts following not simply a plan but what we are finding out, through experience, today.

Alternatives?

I would like to tread lightly here (although I have probably failed). I know our current plan took great work, has been officially adopted by our Trustees, and has a genuine and earned sense of

ownership: by our Trustees who were fully engaged, by those also fully engaged in the predecessor to the UPRC, and by others who worked hard on the plan across campus. But, blogs are for stimulating discussion. And presidents are supposed to take us outside the realm of the known and comfortable. So, let me turn to different approaches. And, here is one space where I don't worry so much about how lightly to tread.

How might we get that symphony? Can we do it in a manner that does not run counter to our culture and that takes advantage of our organizational strengths?

In concept, I do not think it is all that difficult. And, I have seen it work. The basics are:

- The strategic plan should be no longer than a simple, short paragraph. Anything more will not be remembered by all those talented people playing in the symphony. Anything more is likely departing from strategy and is getting into tactics, perhaps coming top down. Anything more gets into "mentioning" (don't forget about me and my program) and hence becomes no more than what I have called "agenda setting."
- The plan is driven by mission interpreted within the context of our current and perceived future environments and internal strengths and challenges. That is what makes it strategic. That is what makes it span presidencies for it is set by mission and by strategic realities rather than by personalities. The strategic vision is nothing more than the mission interpreted within the context of a strategic analysis of the external environment in which we operate and a critical assessment of our internal strengths and vulnerabilities.
- Where does the vision critically depart from the current internal circumstances? That leads to identifying several key goals.
- Ask, for each of the key goals and given our external assessment, what key strategies are most likely to pay off in reaching the goals? Those become the basic strategies.
- And, notice the difference. Several goals and strategies. Not 500 goals and objectives. Not even 52.

On this last point, people can become quite uncomfortable. I look at it this way. Most of what a university does we will continue to do. Missions do not change, not even over decades. How missions are served does change. Almost always at the margin. So, that's what the strategic plan should first focus upon: opportunities to better serve the mission, advance the vision. So much of what is central to a university need not be mentioned among strategic goals precisely because it is central. But, folks find that hard to accept, wanting all in there. That leads to the plan with many, many goals and objectives and "agenda setting" instead of setting vision and strategy.

Some other basic features of strategic plans in my own thinking:

- The plan is the university's plan, not a president's plan.
- A major role for a president is to enable the university in developing its one-paragraph strategic plan. Then, the president must keep repeating the plan until folks are sick and

tired of hearing it. Think conductor. That's what helps talented soloists produce a symphony.

- Another role, perhaps largely for the administration but can involve us all, is to attend to the deficiencies in infrastructure (technical, fiscal, cultural) that stand in the way of talented soloists being able to do their best.
- Among the more important infrastructure needs – and we have progress to make here at Western – is to have the information systems in place that will allow each of us to make informed decisions, the outcomes of which can be also be systematically observed as we learn from experience.

Let me continue in my iconoclastic ways for one more point. Strategic planning, we often assert, must be integrally connected with budgeting. I have written sentences like that and attempted such integration. Looking back, I now think that such an emphasis is one reason why strategic planning efforts usually fail.

It is taken for granted: strategic planning should drive budgetary decision making. But, almost invariably, the first big budget shock to come along, and the detailed plans, action steps, and such go right out the window. So, too, does our confidence in strategic planning if we have seen its merits only in terms of, almost formulaically (again, our abhorrence of messy politics) drives budget choices.

Now, I should not overstate this. Certainly, some idea of where we want to go and how we might best get there must shape budget choices when adding, cutting, and reallocating. But, in a university where most costs are fixed – in overhead, yes, but I am thinking more in our people – there is very little flexibility at the margin in budgetary choices.

However, that very same “fixed costs” limitation opens up huge opportunities for strategic planning to be effective if we think about its purposes a bit differently. That resource where we do have more flexibility is us: our time, talent, creativity, energy, and, at the margin, some proportion of our professional effort. There, clear understanding of a vision, several overarching goals, and key strategies can help us each decide the importance of our current efforts compared to other possible ways we might choose to strategically advance our university and its mission.

So, you heard me right. A strategic plan is a paragraph and that's it: clear vision or direction, perhaps two or three overarching goals, and then the fundamental strategies by which the goals are to be attained and the vision approached. And, here I get really radical: no 11 goals and 52 actions. No, not in there at all. And, its primary value is not as a means to drive budgetary decision making.

How does it work, then?

The vision is essential for it coordinates and integrates that symphony of talented soloists. Got to know what our overarching goals are for the same reason. And, for folks to decide if this is

where they want to come. Or, stay. And the strategy? Has to be calculated based upon a cold sober calculation of external threats and opportunities as well as internal strengths and vulnerabilities.

Why not the usual detail: each goal has 5 more specific objectives, each objective has one to five “action steps”; each action step has a measurable outcome, a person assigned responsibilities, a timeline, and dates by which progress is to be reviewed.

A thing of beauty for the ultimate linear thinker. And, I have never seen it work. At least, not for long. The process always gets blamed. If only those in charge had kept a tighter grip and forced those responsible to deliver on the “measureables.”

But, I have come to believe that the problem is in thinking that “a tighter grip” is the solution to anything – at least anything involving the engagement of talented, creative, critical, and innovative people. These are the basic problems:

- A detailed plan is static while the need, usually, is for us all to know how to respond quickly to unanticipated opportunities and threats. If an opportunity opens up, is it one we want to take and, if so and at the margin, in what direction should we push?
- A detailed strategic planning process, while it can be developed bottom-up through the engagement of many, many hours of many, many people, it must be implemented top down. That does not fit academic culture.
- Strategic planning is a controlling CEO’s dream-come-true. (And, I suppose, a dream come true for a governance committee wanting to keep tabs on – and strings on – a president who might otherwise run amok.) But, if it’s a controlling CEO that we want at Western, you don’t want me. Indeed, strategic planning came to prominence as a strategy for control. Secretary of Defense McNamara was struggling to gain control of the Department of Defense and the generals and strategic planning techniques were his tool. (And, from that, it was not too long a path to objective measures of military tactics, body counts relative to North Vietnamese birth rates, and the Vietnam fiasco.)

Dwight Eisenhower, the consummate planner of D-Day, had far better insight. He put it this way: “Plans are nothing. Planning is everything.”

Know the overarching goals; coldly calculate the most favorable strategies available; meticulously put in place the infrastructure necessary to flexibly support the endeavor. And, success is possible even though the actual plans go out the window (or over the side of the LCI) as soon as the landing craft hit the beaches.

How about an illustration

I said I was going to challenge the conventional use of strategic planning at Western by taking you along on a personal intellectual journey.

Let me take you to a time, some years ago, when I was preparing to be the Chancellor at the University of Wisconsin – Green Bay. There are BIG differences between UWGB and Western. UWGB was a regional university and Western, most certainly, is not. UWGB was a “turn around” situation and, again, Western most certainly is not.

So, I am using UWGB as an example of what a “one paragraph” strategic plan can look like and not as example of what elements should be a part of Western’s strategic plan.

As I prepared to become chancellor at UWGB, there was a strategic plan in place. It was suicidal. Fortunately, it was also done largely top down. So change was not only essential but also relatively easy.

After much listening, discussion, and debate, a strategic plan was developed that could be summarized in two sentences:

Vision: To make the University of Wisconsin – Green Bay Green Bay’s University of Wisconsin

Strategy: Communities support universities that support communities.

Within this framework, there were three overarching goals, the most prominent being “the growth agenda.” Those were repeated over and over and over. Everybody on campus and most in the community understood not only the plan but, consequently, why we were doing what we were doing.

And, the many initiatives were not linearly developed in some “goals, objectives, action steps” plan annually evaluated and revised. Rather, many, many people within their areas of particular responsibility continually spotted opportunities to move forward on the overarching goals with the vision and basic strategy in mind.

Perhaps most important, those initiatives all continue forcefully. They were driven not by a particular person, a chancellor; they were driven by people passionately owning them and fully understanding the underlying strategic forces propelling the initiatives.

I repeat, the particulars of the plan do not fit us: we are not a regional university in a turn around situation. But, in case you wanted an example of a very different approach to strategic planning.

In this approach, the value of the strategic plan is found not in the annual report of accomplishments on the goals, objectives, and action steps carefully plotted and decided upon the year before. No, it is found in the thousand decisions made by faculty and staff, at the margin, when something unanticipated a year ago, arose. There are many examples of innovative and creative steps on the ground that, top down, could never have been thought of. And, they happened because those nearest the action helped create, could name, and “owned” the overarching goals and understood and could name the basic strategies. And, bottom line:

the “growth agenda” was one of three overarching goals; the University of Wisconsin system adopted it as the agenda for the entire system; and, in a year with a \$1 billion state shortfall, the Governor put \$250,000,000 of new funding into higher education. Growth remains the mantra, today, for the University of Wisconsin system as they cope with continuing challenges.

Where does such a plan come from?

What is the process for coming up with such a strategic plan? Linear thinkers again take cover, for it does not come out of the prescriptions from the latest guru selling strategic planning consultation services to the private sector: for x-gazillion bucks, you can purchase one complete, certified strategic plan with glossy publication and interactive web page. It does not come from a broadly representative steering committee with 10 task forces working for a year underneath the steering committee.

Rather, it is something we in academia are very good at. How did the heliocentric concept of the solar system come to replace the geocentric? Why, in academia, does “creationism” have no place in biological science? How did the once-ridiculed notion of plate tectonics emerge as the foundation for huge theoretical advances in Geology? Discussion, discussion, discussion. Debate, debate, debate. Question, question, question. Inquire, inquire, inquire. Argue, argue, argue. Reason, reason, reason. With time, the accepted “truths” do emerge. Always conditionally, of course (something to remember when it comes to any kind of strategic plan).

Again, I warned linear thinkers to take cover for it is a very messy process. But, by staying fully and intellectually engaged with each other, we have all the tools in place – have had them in place for centuries – to move Western strategically forward.

So, what will Western’s approach to strategic planning be as we have the responsibility to revise the current strategic plan? You will decide. My job is to provoke our best thinking on the subject. And, this blog entry is offered as a way to initiate (and, most certainly not conclude) discussion and decision about how Western should fulfill its commitment to ongoing strategic planning.

Bunce