



STRATEGIC PLANNING AT
ILLINOIS

Agenda

- Background, purpose and timeline
- Strategic planning framework
- Strategic goals and initiatives
- Progress indicators/ metrics
- Strategic priorities
- Implementation activities
- Key messages

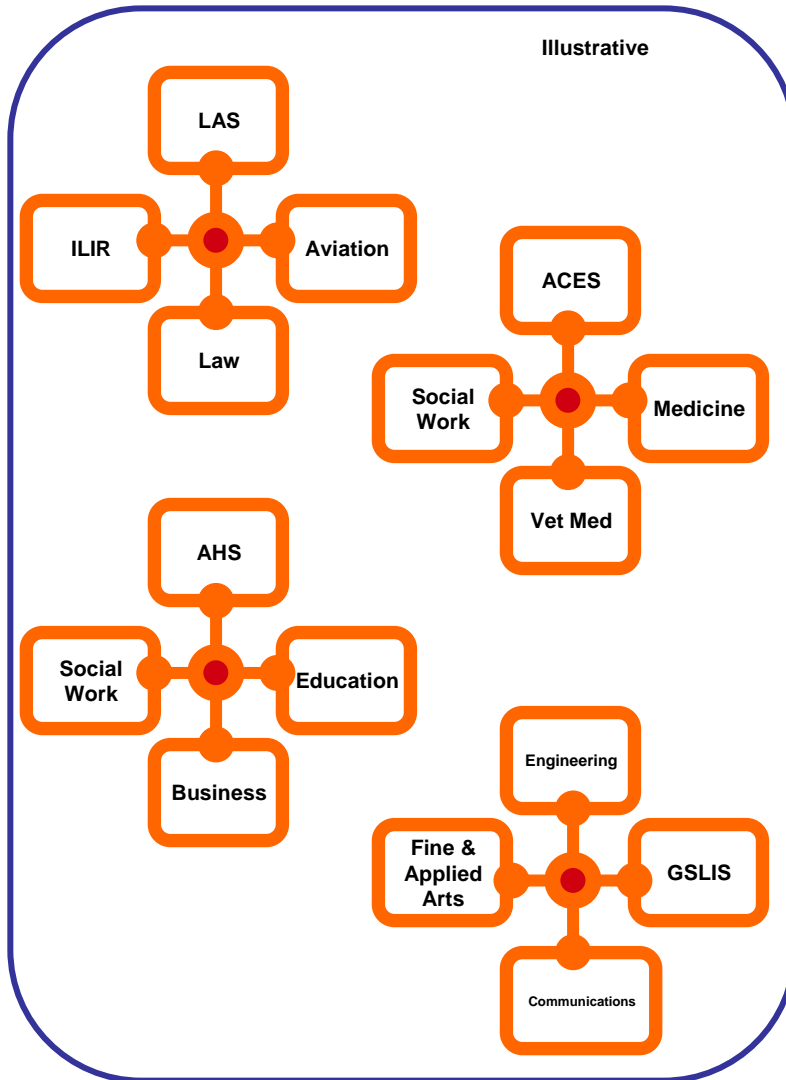
Strategic Planning Background

- Illinois had a history of creating strategic plan documents, with limited implementation focus
- The current process was initiated by the University of Illinois President in March 2005
- A multi-staged plan development process was instituted (concluded June 30, 2006)
 - Stage 1: Creation of an overall strategic planning framework
 - Stage 2: University-level and related organizational plans
 - Stage 3: School, College, and Major Administrative Unit plans

Why Strategic Planning

- Helps people define the institution over the next 20+ years
- Creates a directional document, to guide while not limiting future opportunities
- Enables the university to align strategic objectives with financial and human resources
- Provides a mechanism to continually review and ensure excellence in education, research and outreach

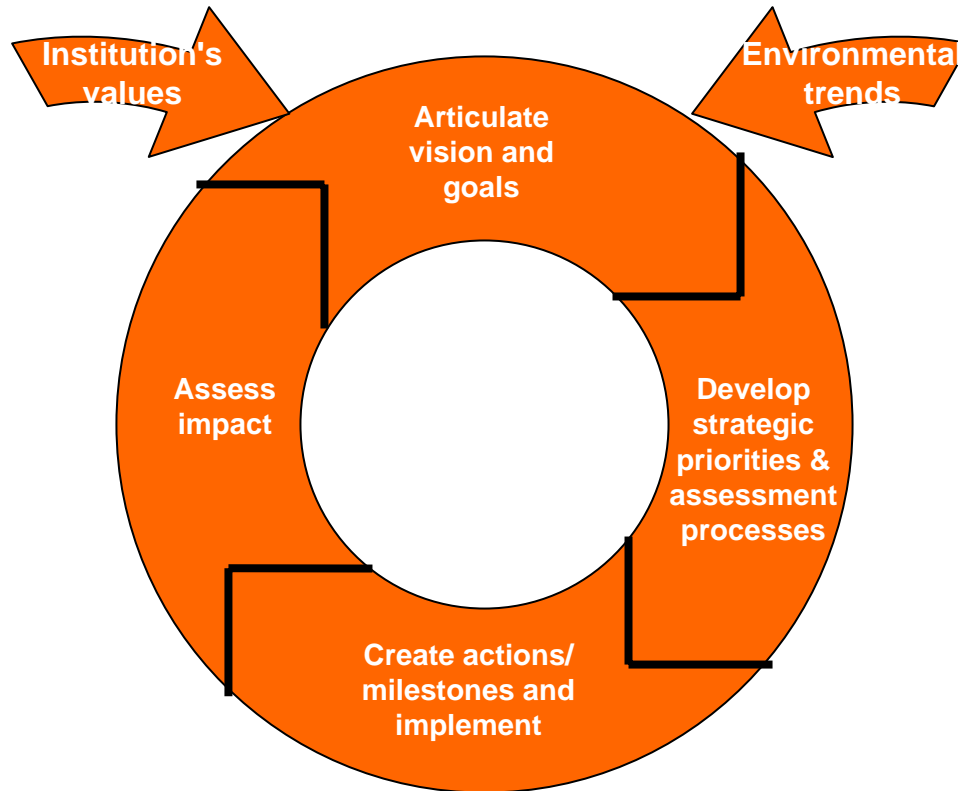
Why Strategic Planning



Our strategic plan is a **“call to action”** for the institution to identify and create **unique interdisciplinary connections** to:

- Develop cross-disciplinary curriculum
- Generate innovations in the arts, humanities and sciences
- Capitalize on future opportunities, unknown today

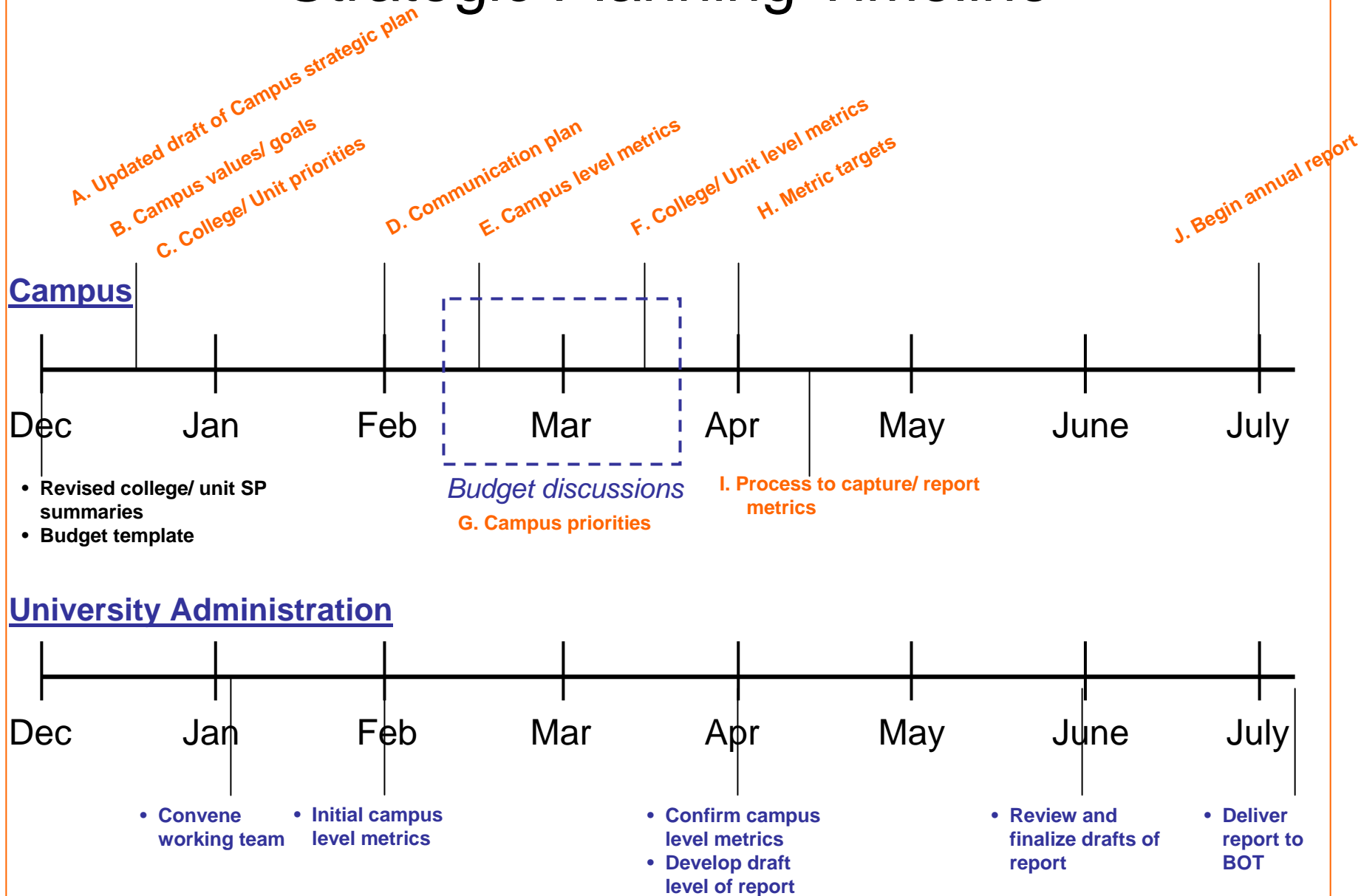
Cycle of Strategic Planning



Our strategic planning process will involve continuous assessment of the institution's progress towards its goals, considering both changes in the institution's values and the environment in which it operates

Today, we are at the first iteration of the campus' plan

Strategic Planning Timeline



Strategic Planning Framework

Vision



Values



Goals



Strategic Initiatives



Progress Indicators

“Preeminent Public Research Institution”

- Our Commitment
- The Values that Drive our Goals

5 campus goals

Aligned to the relevant goal

- Campus-level
- College/ unit specific level

Our Commitment

- We embrace and advance our Land Grant mission by serving the state and the nation through education, research, outreach and economic development.
- We pursue excellence through the diversity of our students, faculty, and staff.
- We foster innovative teaching, research and engagement, demanding and rewarding break-through knowledge creation and learning from our faculty and students.
- Our educational programs promote innovation, cultivate justice, enhance social mobility, and improve the quality of life by responding to local, national and global societal needs.
- We are one campus dedicated to comprehensive excellence in the service of Illinois and the nation.
- We maximize our impact by carefully stewarding and enhancing the resources entrusted to the institution.

Campus Goals

Goal I: Leadership for the 21st Century

Goal II: Academic Excellence

Goal III: Breakthrough Knowledge and Innovation

Goal IV: Transformative Learning Environment

Goal V: Access to the Illinois Experience

Goal I: Leadership for the 21st Century

- **Promote intercultural scholarship and learning**
- **Increase and enhance undergraduate research or other creative opportunities**
- **Strengthen honors programs**
- **Provide internship, practicum and other experiential learning opportunities**

Goal II: Academic Excellence

- **Recruit and retain exceptional faculty**
- **Increase the diversity of faculty and staff**
- **Strengthen recruitment of high achieving students, particularly of underrepresented populations**
- **Position the academy to meet 21st century opportunities**
- **Develop interdisciplinary academic programs in emerging areas of scholarship**
- **Increase opportunities for cross-disciplinary doctoral education**
- **Develop professional master's programs in areas of pressing needs**
- **Maximize our impact by stewarding and enhancing our resources**

Goal III: Breakthrough Knowledge and Innovation

- **Initiate interdisciplinary programs to address global societal needs**
- **Strengthen and diversify the research portfolio**
- **Increase the Illinois presence**
- **Strengthen our rich ties to Chicago**
- **Partner with the local community**

Goal IV: Transformative Learning Environment

- **Repair, reprogram and maintain campus facilities at a level consistent with a world class academic enterprise**
- **Increase energy conservation**
- **Build and enhance living/ learning communities**
- **Invest in educational technology**
- **Embrace the diversity of students, faculty and staff to strengthen the learning environment**
- **Enhance public good facilities (e.g., Library, Krannert, etc.)**

Goal V: Access to the Illinois Experience

- **Increase merit and needs based aid to recruit and retain the most promising students**
- **Increase the diversity of the student population**
- **Increase and excel in online learning**

Strategic Planning Framework

Preeminent Public Research Institution

Vision

Values

- Embrace and advance our Land Grant mission
- We pursue excellence through the diversity of our students, faculty, and staff
- Create educational programs that cultivate innovation, justice, enhance social mobility and quality of life by responding to local, national and global societal needs
- Demand and reward breakthrough knowledge creation and learning
- As one campus, achieve comprehensive excellence in the service of Illinois and the nation
- Maximize our impact by carefully stewarding and enhancing the resources entrusted to the institution

Strategic Goals

Leadership for the 21st century

Academic excellence

Breakthrough knowledge and innovation

Transformative learning environment

Access to the Illinois experience

Strategic Initiatives

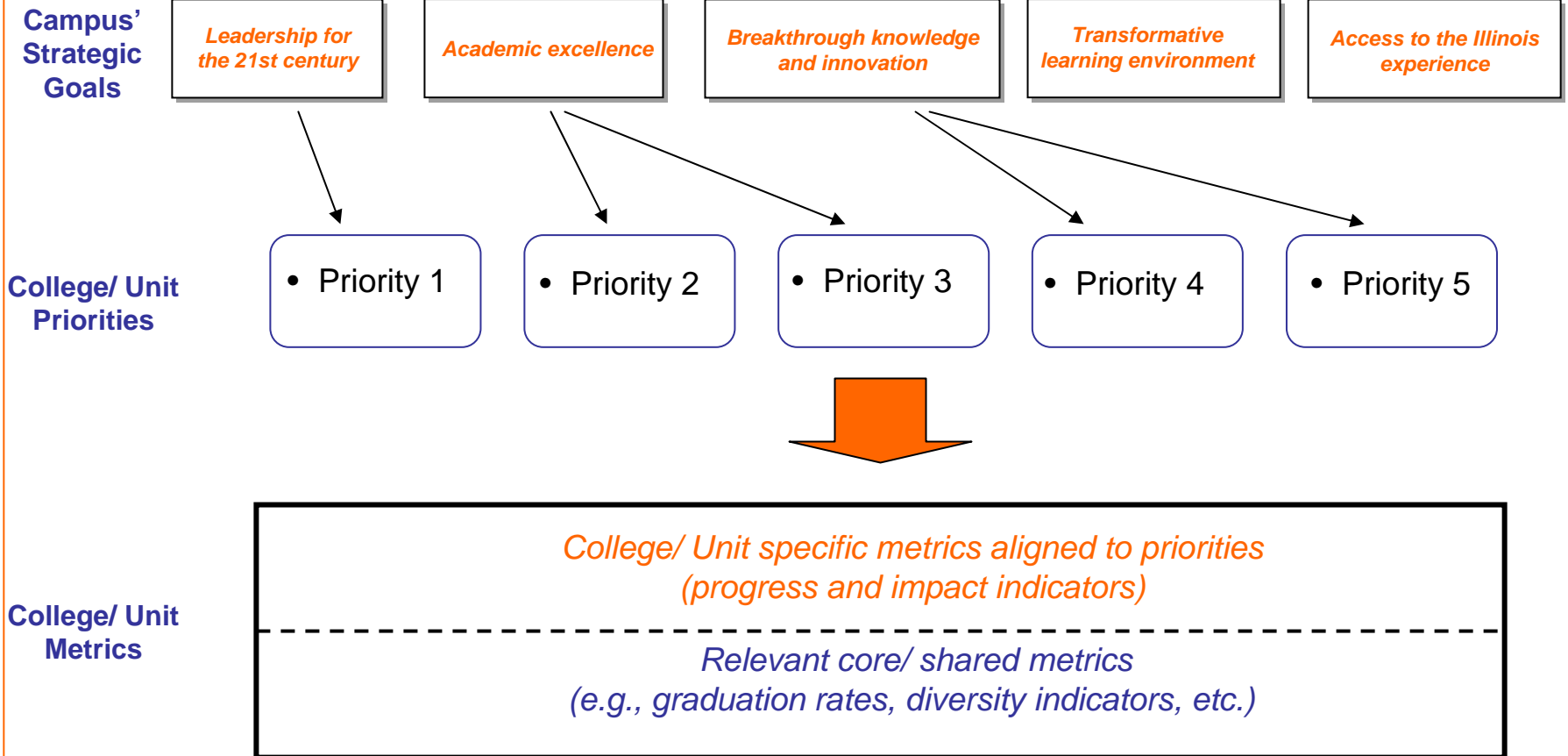
- Promote intercultural scholarship and learning
- Increase and enhance undergraduate research opportunities
- Strengthen honors programs
- Provide internship, practicum and other experiential learning opportunities
- Recruit and retain exceptional faculty
- Increase the diversity of faculty and staff
- Strengthen recruitment of high achieving students, particularly students of underrepresented populations
- Position the academy to meet 21st century opportunities
- Develop interdisciplinary academic programs in emerging areas of scholarship
- Increase opportunities for cross-disciplinary doctoral education
- Develop professional master's programs in areas of pressing needs
- Maximize our impact by stewarding and enhancing our resources
- Initiate interdisciplinary programs to address global societal needs
- Strengthen and diversify the research portfolio
- Increase the Illinois presence
- Strengthen our rich ties to Chicago
- Partner with the local community
- Repair, reprogram and maintain campus facilities at a level consistent with a world class academic enterprise
- Increase energy conservation
- Build and enhance living/ learning communities
- Invest in educational technology
- Embrace the diversity of students, faculty and staff to strengthen the learning environment
- Enhance public good facilities
- Increase merit and needs based aid to recruit and retain the most promising students
- Increase the diversity of the student population
- Increase and excel in distance learning

Progress Indicators

- Graduation rate
- Retention rate
- % of students with a global experience
- % of undergraduates with a research experience
- % of students with an internship or practicum experience
- Student placement percentage
- # of national academy members or other nationally recognized honorary memberships
- # of faculty in leadership positions or with fellowship status in societies
- % of underrepresented faculty and staff
- Student quality¹
- Student to faculty ratio
- Total expenditures compared to total budget
- State expenditures per IU
- Total sponsored research expenditures by source
- Sponsored research expenditures by per faculty FTE
- Number of publications/ citations per faculty FTE
- Total revenue from licenses/ patents
- Total number of start-ups
- Impact on societal needs²
- Level of deferred maintenance (FCI)
- Energy consumption
- % of sections with under 20 students
- State expenditures per student
- Total financial aid
- % of student receiving financial aid
- % of under-represented students
- # of distance learning IUs
- % of faculty involved in civic engagement

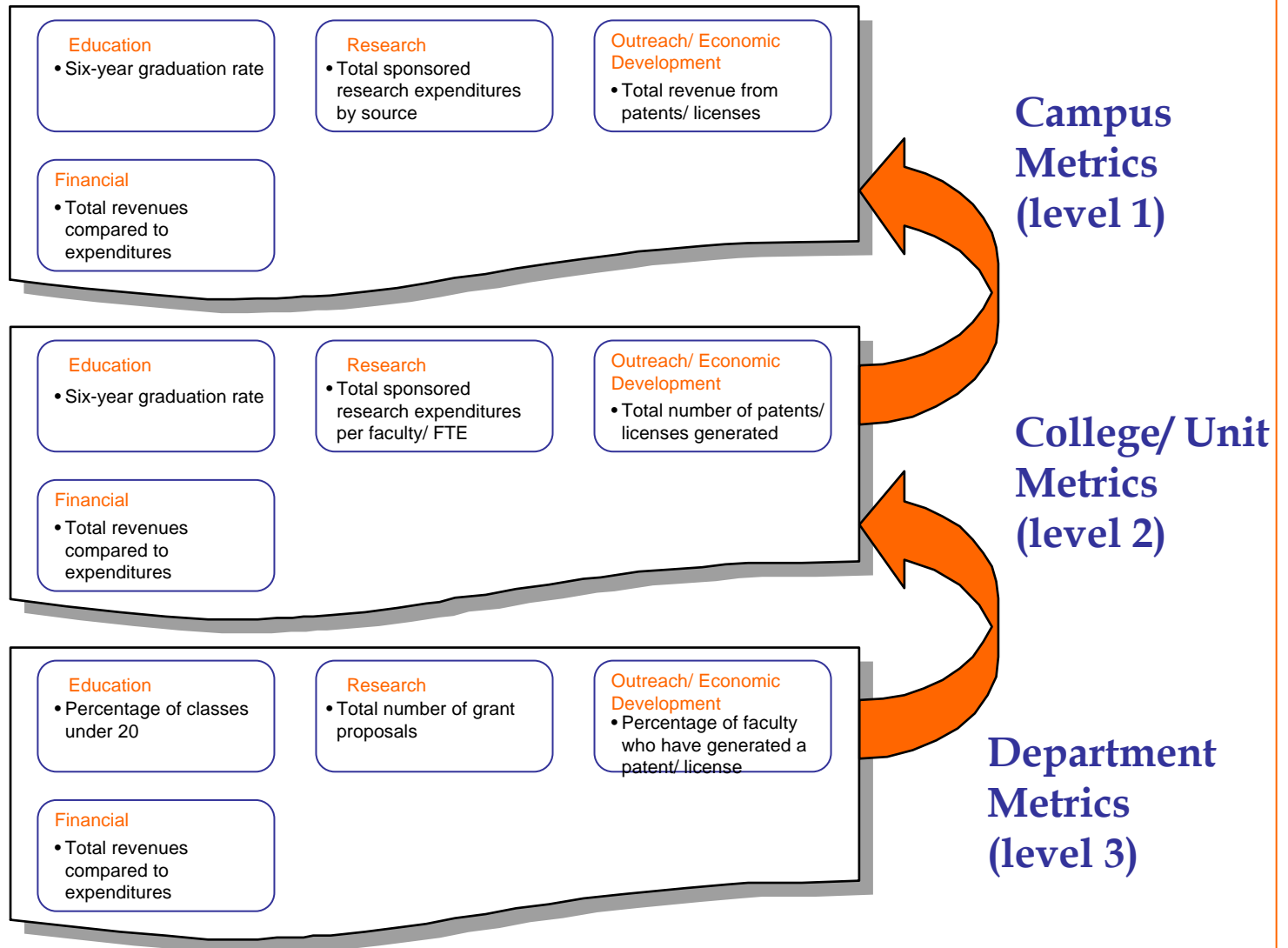
¹- may include HS rank and ACT & graduate student indicators
²- may be a qualitative measure, illustrated by examples

College/ unit Level Plans



Metrics Alignment

Illustrative



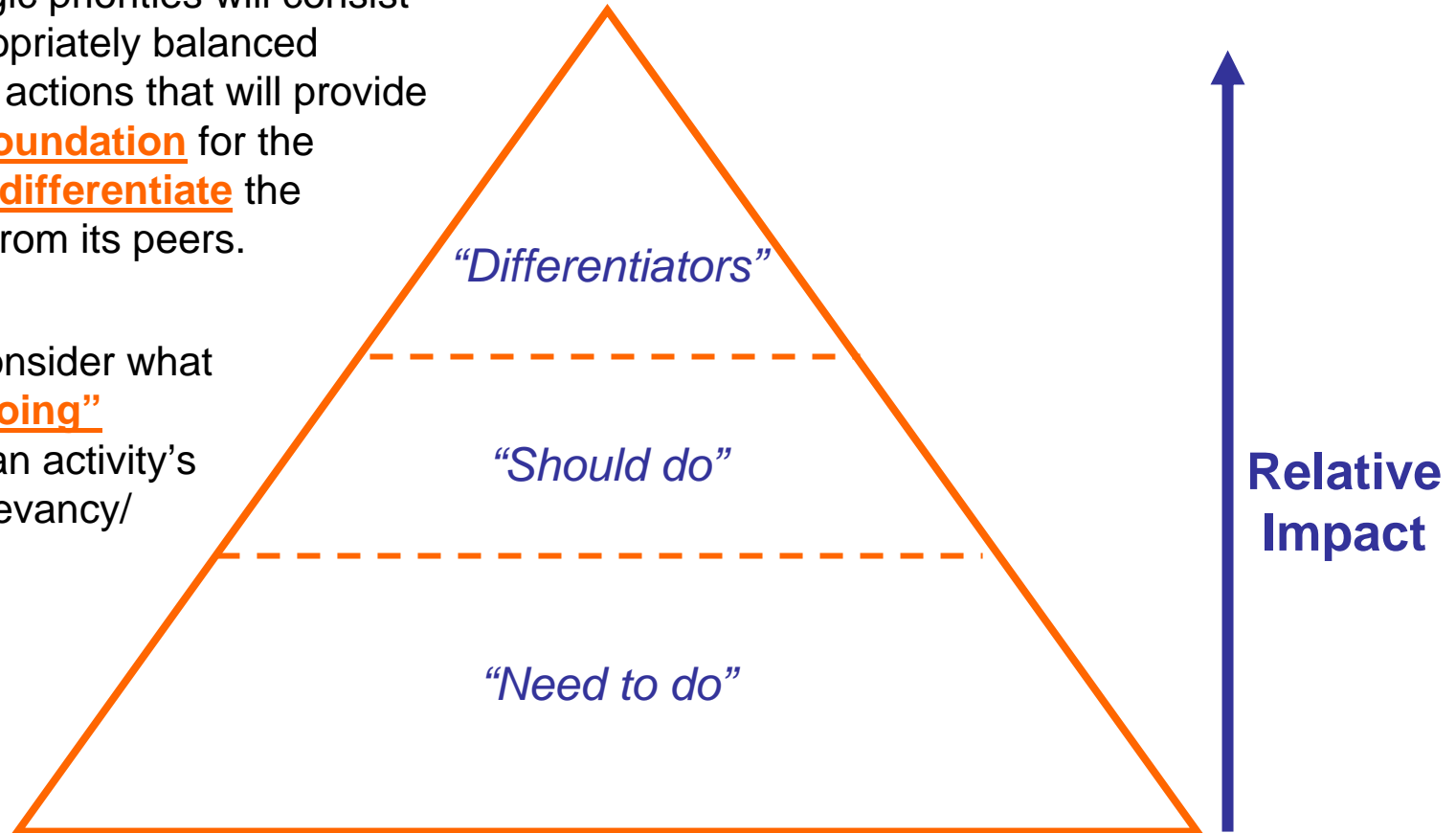
Metrics Criteria

Understandable	Can the performance measure be easily and clearly communicated?
Controllable	Can the results be controlled or significantly influenced under a designated span of control?
Actionable	Can action be taken to improve performance?
Credible	Is the measure resistant to manipulation?
Measurable	Can the measure be quantified?
Cost effective to access	Can the data to support the measure be accessed cost effectively?
Aligned with objectives	Is the measure aligned with an objective?
Integrated	Can the measure be linked both down and across the organization?
Key value drivers	Can the measure be associated with the major drivers of performance?

Hierarchy of Priorities

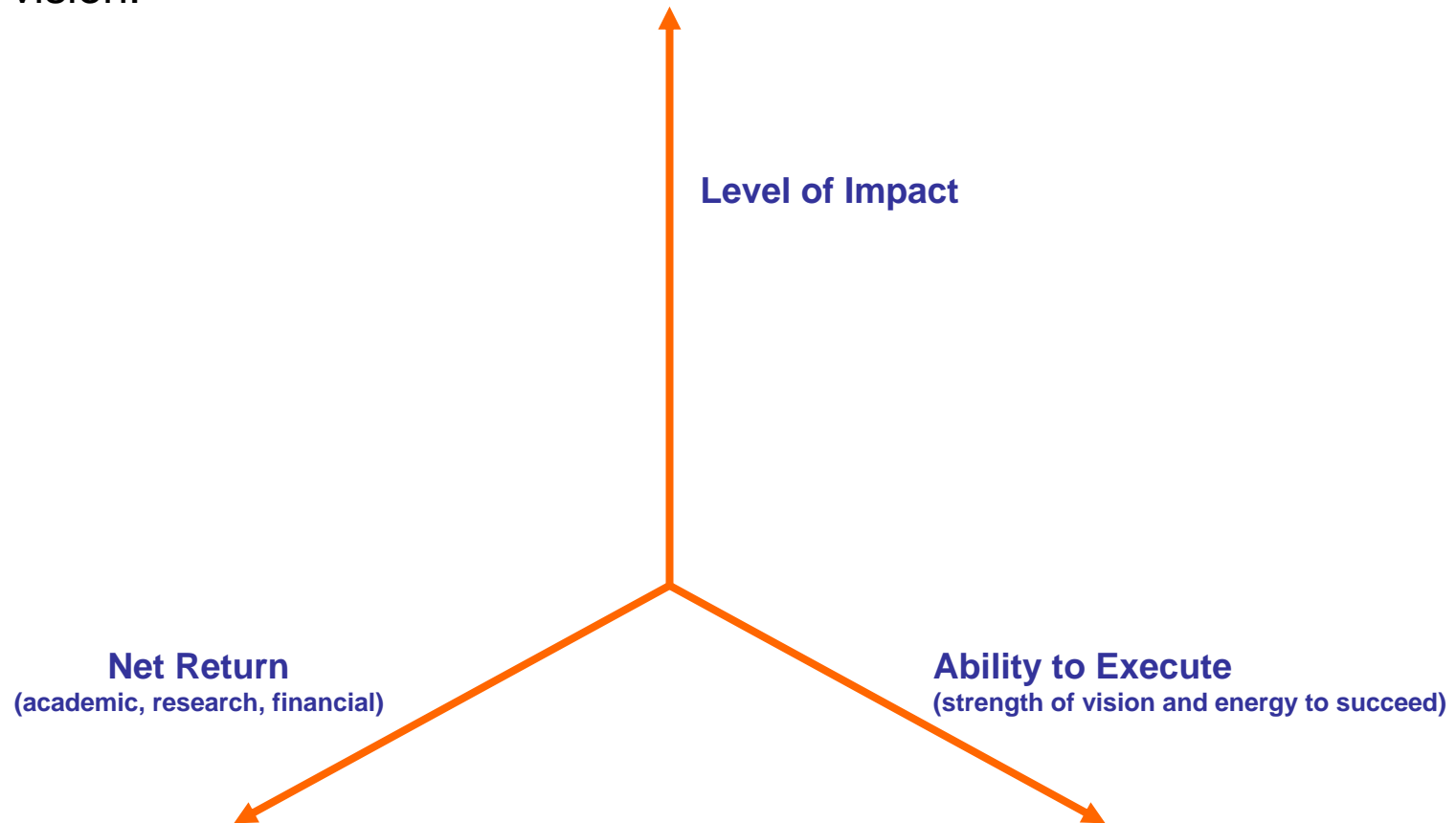
Our strategic priorities will consist of an appropriately balanced portfolio of actions that will provide a **strong foundation** for the future and **differentiate** the institution from its peers.

Need to consider what to **“stop doing”** based on an activity’s current relevancy/ impact



Priority Setting

Several criteria will help to identify the critical actions to undertake in the short and long-term, that will enable the institution to achieve its vision.



Priorities and Sources of Investment

Priorities

Hiring excellent faculty

Retaining faculty

Enhancing the quality of academic programs

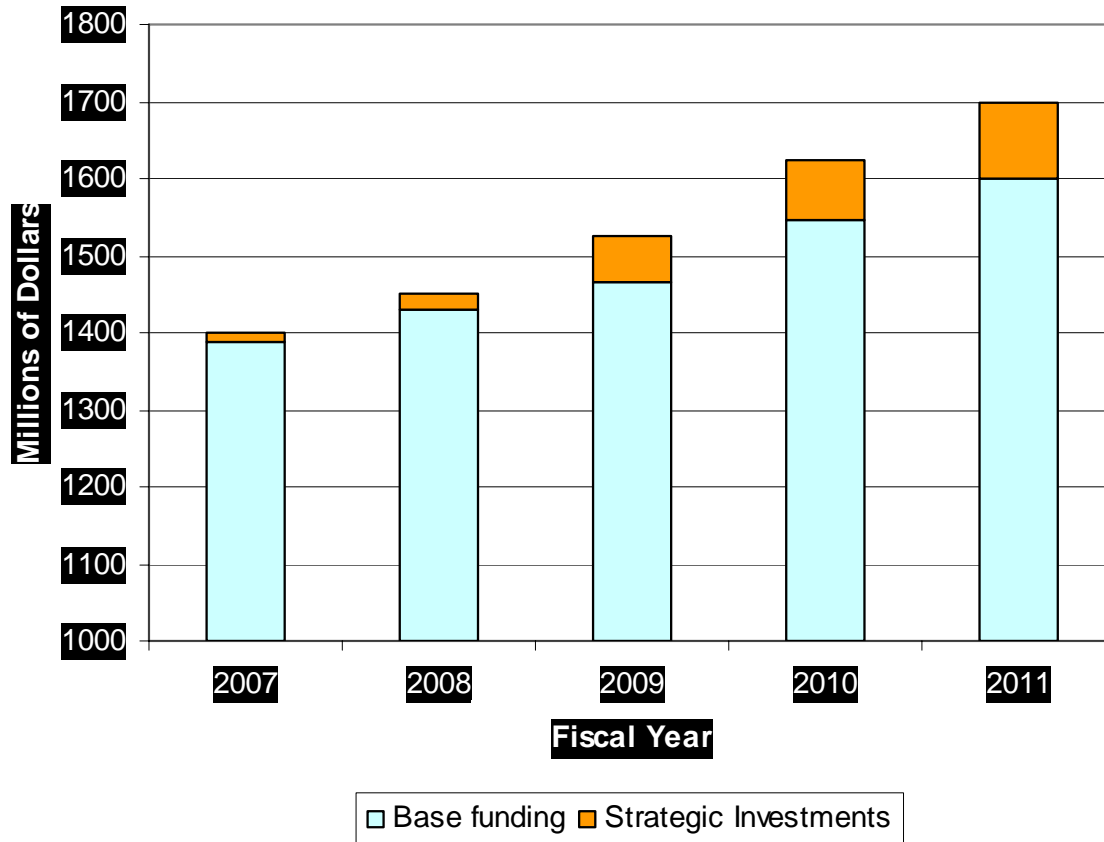
Increasing financial aid
(access, affordability,
achievement)

Improving the quality of facilities

Sources of Funding

- Modestly increasing tuition
- Tripling the amount of corporate support (currently 2.7% of research expenditures)
- Increasing private giving
- Growing and diversifying the funding of sponsored research

Strategic Investments



- Strategic investments will increase over the next 5 years
- These investments will be from new funds and strategic reallocations

Figures shown are illustrative, actual expenditures and investments by year to be refined

Implementation Activities

- Reframing and streamlining of the strategic plan aligned to 5 strategic goals
- Defining campus-level progress indicators
- Developing College/ unit priorities and metrics
- Linking the strategic plan to key processes, including:
 - Budgeting and resource allocation
 - Development campaign
 - Promotion and tenure process
 - Target of Opportunity and Excellence hires
- Creating a communication plan to support the implementation
 - Strategic planning website
 - Targeted articles in campus-wide publications
 - Key messages incorporated into town hall meetings, speeches and other presentations

Key Messages

- Strategic planning is a **continuous process**
- The strategic plan is a **“directional”** document
- The strategic initiatives are **dynamic** and the priorities are driven by **vision and energy** of faculty and staff
- Progress indicators (i.e., metrics) enable us to **identify achievements** and **address barriers**
- Opportunities exist for **all to participate**