

University of Windsor's Proposed Strategic Planning Process

Final Position Paper Summary
November 2021

Aspire.

This is an updated summary of the University of Windsor Strategic Planning Process Discussion Paper. This updated summary highlights changes made to the previous draft version Discussion Paper that was shared in mid-October. It incorporates the input from the feedback survey that closed on October 27th.

Engagement is vital to the success of our strategic planning! Thank you to all the students, staff, faculty, community members and administration who contributed their comments and thoughts to strengthen this process.

You can read more about [“What We Heard” here.](#)

Why?

Strategic planning is the process where an organization works together to articulate a common vision, values, priorities, and goals based on collective experience, shared aspirations and an understanding of current and evolving internal and external contexts (Falkenberg & Cannon, 2021).

Our strategic plan will be one of the University's most important navigational tools to:

- Inform short- and long-term goals
- Establish benchmarks to measure progress
- Establish public accountability reporting
- Determine how resources and energies are directed

The plan will communicate where we should be in the future (using a five-year horizon) and will guide the University's decision-making. A new strategic plan will help us capitalize on opportunities to grow and thrive – opportunities that we as a community have decided are important to us.

Why now?

Our current strategic plan is over 10 years old and much has happened in that time, including:

- A downtown campus and significant campus transformation
- Increase in enrolment, international students, and research funding
- Major faculty hiring, new programs, research centres, and partnerships
- New president and other changes in leadership
- Changes to the provincial approach to accountability and overall decrease in funding
- Demand for work-integrated and experiential learning
- Urgent need for action on equity, diversity and inclusion, and Truth and Reconciliation
- Increasing urgency of threats of climate change and environmental degradation
- Evolving regional and civic strategic planning focusing on regional economic diversification, labour-force stability and new strategic visions
- COVID-19

It is an opportune time to build a strategic plan as the University maps out its future. This is a prime opportunity to engage in learning about who we are, who we want to be as a community, and what we can learn from other institutions.

Status Report: Preliminary Planning and Feedback

In Spring '21, we began research and preliminary consultation on strategic planning processes. We also consulted with Dr. Dru Marshall, Past Provost and Vice-President, Academic at the University of Calgary, who recommended that we gather feedback on three foundational considerations as we begin the planning process.

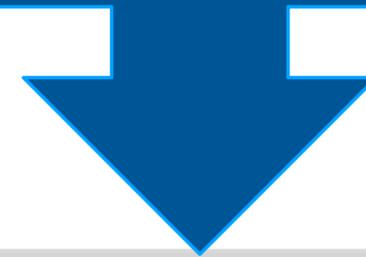
Three foundational considerations:

1. Identifying a core set of **values** and principles that planning should operate from
2. Shaping the process based on institutional **context**
3. Articulating **aspirations** for the process

We collected this information from the Board of Governors, Senate and the University's senior management team to begin. Then we drafted a position paper outlining a proposed strategic planning process. Through a feedback survey, **all members of the campus community were invited to weigh in on these three foundational consideration and to provide further input on the draft Position Paper.** The following slides summarize what we've heard from these consultations so far.

Original Position Paper: Values

Question 1: What values should guide the development of the University's strategic plan? What will the planning process look like if the values are operationalized?



So far, the most common responses to this question focus on **equity, diversity and inclusion, accountability, and trust**. Other values identified include:

Equity, Diversity, Inclusion, Reconciliation and Respect	Accountability and Transparency	Trust, Integrity and Honesty	Connectedness and Community Engagement	Leadership and Excellence	Learning-focus
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Original input from Senate, the Board of Governors and the senior management team

New Feedback: Values

The campus-wide feedback survey elicited the **additions and changes** identified (**bolded**) at right.

The feedback survey also indicated that we had not made it entirely clear that these were **values we intended to guide the *process* of strategic planning**, not as the institution's long-term values institutional values. It was also noted that some of them overlap.

These values are interconnected. Ultimately, some of them may also potentially persist in the institutional values the campus community will develop together as this process move forwards. Right now, they are **intended as the basis how we will conduct ourselves and the qualities that campus community members have suggested should guide our work *during the planning process***.

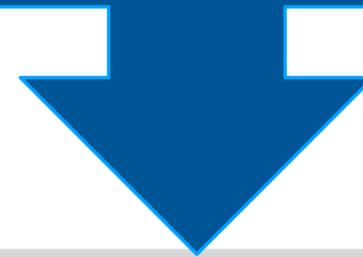
- **Prioritizing Excellence in the Academic Mission of the University (New)**
- Equity, Diversity, Inclusion, Reconciliation, **Accessibility** and Respect (Revised)
- Accountability and Transparency (Revised)
- Trust, Integrity and Honesty
- Connectedness, **Collegiality** and Community Engagement (Revised)
- Leadership Excellence, **Creativity** and an Aspirational Focus (Revised)
- **Innovation, Nimbleness and Boldness (New)**
- **Sustainability and Stewardship (New)**
- **Strategic Planning that focuses on all of us learning together (Revised)**

* Bolded are new items

Original Positional Paper: Context

Original feedback from Senate, Board
of Governors and Strategic Leadership
Forum

Question 2: What contextual factors (internal and external) do we need to consider in designing the strategic planning process and later strategy implementation?



So far, the most common contextual factors identified include:

COVID-19 on our ability to consult	Work needed to become an equitable, inclusive and welcoming space	Role of the University for the region and its communities	Changing leadership within the institution	Changing demographics, post-secondary sector, and political landscape
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New Feedback: Context

A Look Ahead: We will be sharing a series of discussion documents throughout the fall that explore many of contextual factors.

The goal of these documents is to set a foundation of understanding of our current context so we can move forward in this process and jointly learn and grow together.

We also plan to continue our virtual speaker series in 2022 with experts who can provide insights related to strategic planning.

- As in the original feedback, a dominating contextual factor was COVID and its impact on students, staff, faculty, and institution. Feedback described both immediate and longer-term implications of the pandemic, and other shifts that have occurred.

Other feedback expanded on existing themes :

Changing demographics and the post-secondary sector:

- Enrollment patterns
- Budgets formulas
- Provincial mandate agreements

Work needed to become in equitable, inclusive and welcoming space:

- Workplace morale
- Ensuring a transparent process to build trust

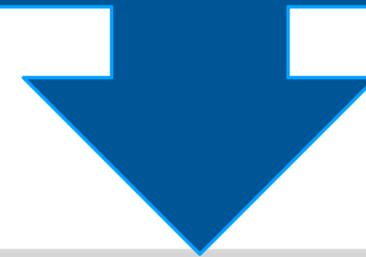
New:

- Leadership on environmental stewardship and climate change

Original Position Paper: Aspirations

Original input from Senate,
Board of Governors and
Strategic Leadership Forum

Question 3: If we do this right, from your perspective, what would be the tangible benefits or outcomes of the strategic planning process?



So far, the most common aspirations or tangible benefits identified include:

An engaged campus with strong morale and healthy relationships	A clear, well-aligned institutional roadmap for accountability and transparency	Enhanced reputation, and sense of pride	A destination of choice for students, faculty, and staff	A welcoming, inclusive, equitable, and just campus
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New Feedback: Aspirations

Feedback on the desired tangible benefits or outcomes from strategic planning mostly supported the key themes identified in the original feedback, but provided more specifics, as identified at right.

Additions connected to the theme "destination of choice":

- Improved reputation (rankings and public perception)

Additions connected to "well-aligned institutional roadmap in previous submission"

- Clear metrics
- Stated goals of the university align with the allocations, rewards and recognition within the institution

Additions connected to a "welcoming, inclusive, equitable, and just campus"

- Campus is a safe space for students, staff and faculty.

New themes:

- Stronger research and community partnerships that create opportunities for students, staff and faculty while also helping build a more inclusive community (new)
- Leadership in environmental sustainability and stewardship (new)

Planning Process: Guiding Principles

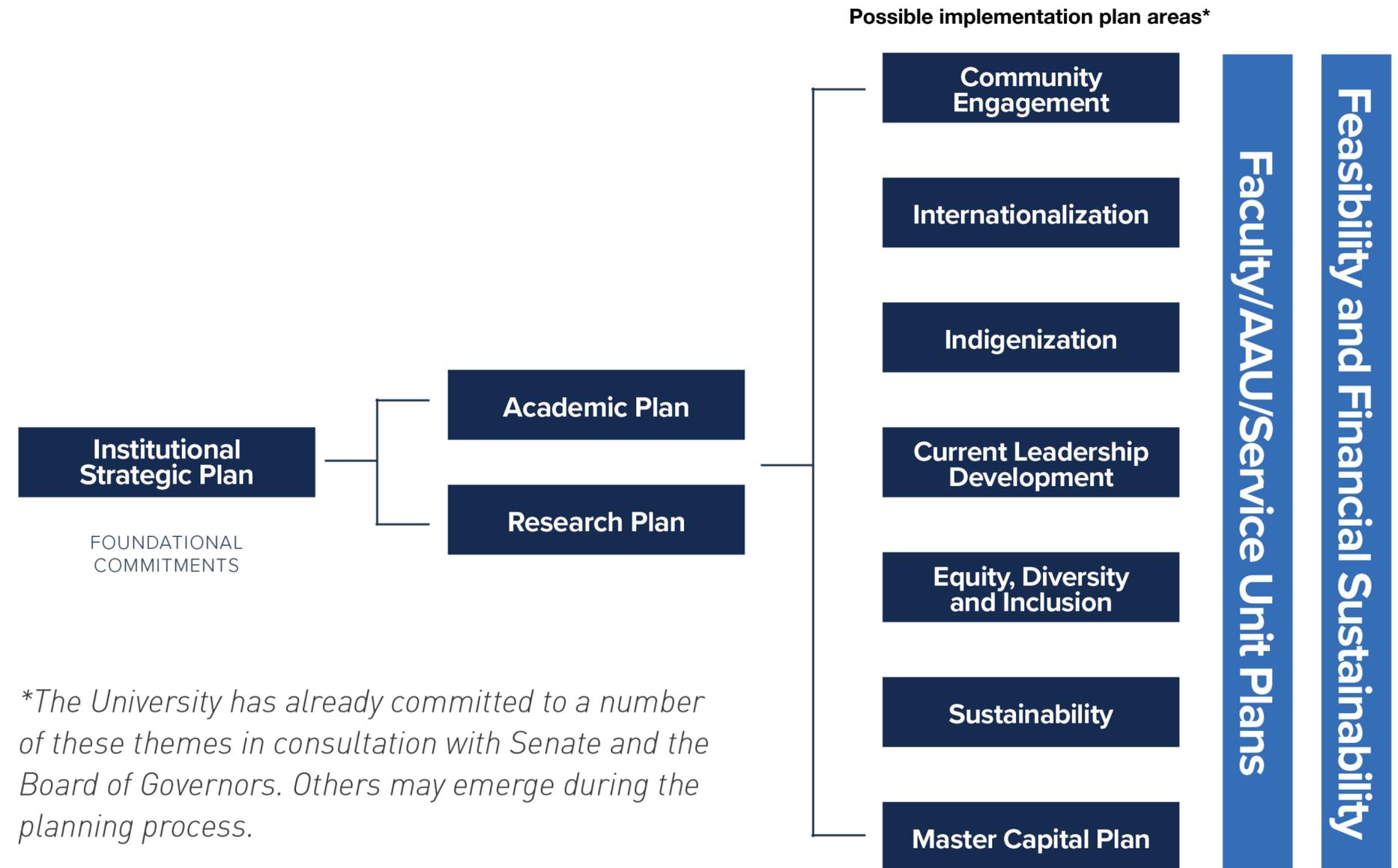
Based on feedback gained so far, we generated these draft principles to guide the planning process in the original document :

- **Be inclusive**, engage the campus and community
- Ensure lived experiences and goals of diverse communities are key to planning so that the ultimate strategic plan fosters an increasingly **just, inclusive, equitable, and welcoming campus**
- Provide opportunities for the campus community to **listen, learn and share**
- **Strive for transparency** through extensive and timely communications and numerous opportunities for input and feedback.
- Emphasize a process that encourages **collective learning, supported by research and analyses** drawing on multiple sources and forms of data.
- Build **stronger community engagement** through this process
- Be **inspirational**, focus on **excellence, impact, and growth**
- **Be practical** and recognize that in some cases a phased approach may be necessary

There were no proposed changes to the Guiding Principles.

Planning Process: Cascading Strategies

- The current timeline and planning focuses on the development of these components of Institutional Strategic Planning
 - University's mission
 - Values
 - Vision and goals
 - Objectives and benchmarks
- After the Institutional Strategic Plan is finalized, we will develop aligned implementation plans with specific foci
- Financial sustainability and feasibility provide an important lens throughout in order to ensure that we continue to achieve our institutional mission



Committee Structures

Steering Committee

- Oversees process and outcomes based on project charter.
- Oversight of design and implementation of the communications & consultation processes.
- Reviews feedback themes, document drafts, and the final strategy.
- Ensures representation of multiple voices in decision making.
- Liase for their areas on time and resource allocations needed for this process.

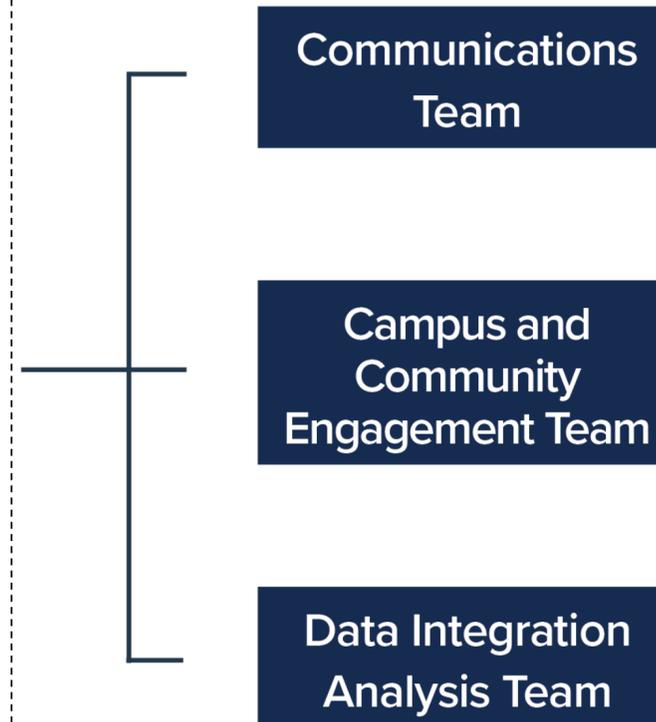
Project Committee

- Day-to-day operations
- Design, structuring and implementation of the consultation and communications activities.
- Analysis of the results, preparation of the initial strategy documents for review.

The Executive Leadership Team, Deans' Council, Senate and the Board of Governors will be regularly consulted during this process. The University Secretary will coordinate consultation with Senate and the Board of Governors

The Project Committee is a subcommittee of the Steering Committee.

All members of the Project Committee are members of the Steering Committee. The chairs of the various teams join the Project Committee as needed to update the process.



Steering Committee Composition

Delegates

- GSS president (or delegate)
- OPUS president (or delegate)
- UWSA president (or delegate)
- WUFA representative
- Faculty Senate representatives (2)
- Provost's Council representative
- Deans' Council representative
- Unionized staff employee group representatives (2)

Appointed

- President (Chair)
- Board chair
- Board member
- Provost and VP,A (Vice-Chair)
- VP, EDI
- Indigenous Faculty Representative
- Alumni representative
- Community representative
- Industry representative
- Faculty members at-large (3)

Project Committee

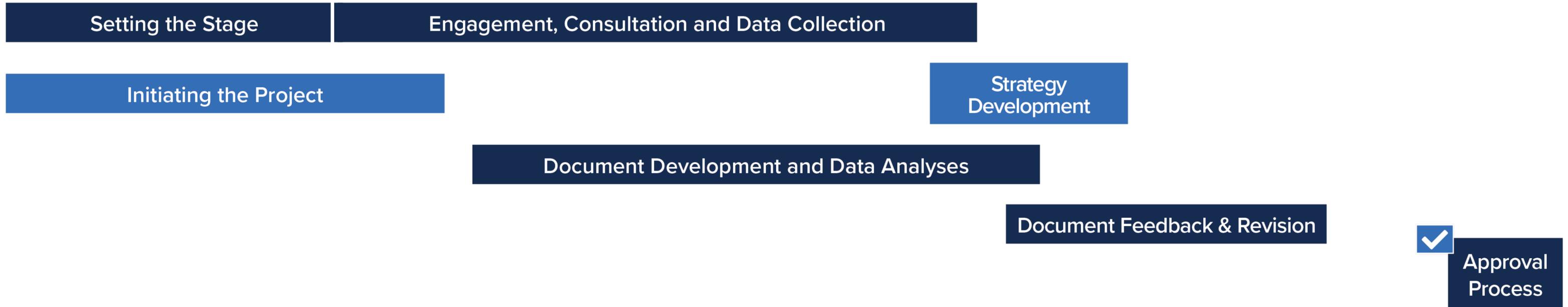
- AVP, Academic (Chair)
- ED, Institutional Analysis
- Faculty member at-large
- Director, Anti-Racism Organizational Change
- Executive Director, ORIS
- AVP, Finance
- Executive Director, PAC

The Executive Leadership Team, Deans' Council, Senate, the Aboriginal Education Council and the Board of Governors will be regularly consulted during this process. The University Secretary will coordinate consultation with Senate and Board of Governors.

The Strategic Planning Process is supported by the Chief of Staff and a Project Management Specialist with other support staff.

Process and Timeline

August September October November December January '22 February March April May June July August September October



Implementation and Accountability

- Following approval by the Senate and Board of Governors, the operationalization of the plan will begin with the development of the academic and research plans as part of the cascading strategies.
- Tracking of key performance indicators outlined in the strategic plan will begin.
- Future annual reports, public presentations, and web-based reporting will provide ongoing tracking of these indicators.

Communications Plan

Throughout the planning process, communications will be consistent, relevant and timely, and informative and accessible. There will be annual public reporting on progress of milestones and metrics included in the plan.

Our communications strategy uses a phased approach.

Phase 1 (November '21 – January '22): [Readying for the Process](#) – sharing information about the process, highlighting the importance of stakeholder engagement and feedback, and branding to build momentum.

Phase 2 (January '22 – October '22): [The Strategic Planning Process](#) – providing awareness and engagement to reach audiences through web presence, multiple communication tools, and leveraging partnerships.

Phase 3 (October '22 –): [Delivery of the Plan and Next Steps](#) – ensuring that stakeholders understand how they've contributed to the plan, and how the plan informs strategic directions, everyday actions and decision making through celebrations of the work and public presentations.

To date this engagement process has been informed by 291 contact points with members of the community both on and off campus.

We are striving to engage as broadly and inclusively as possible. We look forward to connecting with you in the near future!