

Joint Planning and Budget Committee
Strategic Planning Proposed Recommendations
March 2021

On Feb. 24, 2021, Chancellor Gow submitted a charge to the Joint Planning and Budget (JPB) Committee, directing the Committee to make recommendations related to (1) updating the Strategic Plan website and 2016-20 report and (2) responding to UW System initiatives outlined in Governor Evers's 2021-23 state budget proposal. The JPB Executive Committee offers the following recommendations related to strategic planning for consideration by the full Joint Planning and Budget Committee.

RECOMMENDATION 1

JPB recommends the detailed items below in response to Chancellor Gow's charge letter item 1. (a) which reads: *Please make a recommendation regarding how best to update our Sustaining Excellence strategic plan website and 2016-2020 Strategic Planning Report to indicate that each of the pillars of the plan is now being led on an ongoing basis by a specific vice chancellor, sometimes in collaboration with another UWL administrator.*

- a. On the Sustaining Excellence website (landing page), add a point person to each pillar. Include the point person as part of the pillar graphic.
- b. For each pillar, publish a 2020-2023 action plan to the website that provides designated leads and timelines for ongoing action items.
- c. Update the 2016-2020 Strategic Planning hyperlink text on the Sustaining Excellence website to read "the first five years."
- d. Create and publish an annual update to the 2016-2020 Strategic Planning Report that makes clear the progress on action items since FY2020. (*Please note: this step is being completed already by IRAP. JPB just recommends making the updates into an annual report .pdf.*)

Rationale – The key issue here is to ensure the UWL community is aware of the ongoing implementation of the existing plan. Doing so requires making easily accessible and clear who is accountable for that ongoing implementation as well as the progress made on action items and by what timeframe they should be accomplished. To some degree, these goals can be accomplished by better highlighting work that is already taking place. Designating a timeline for ongoing action items and creating/publishing annual updates would help convey the fact that implementation is continuing.

RECOMMENDATION 2

JPB recommends the detailed items below in response to Chancellor Gow's charge letter item 1. (b) which reads: *Please make a recommendation regarding how the title of the 2016-2020 Strategic Planning Report might be updated to indicate we are continuing to pursue the four pillars of the plan.*

- a. We recommend leaving the 2016-2020 Strategic Planning Report document as titled.
- b. We recommend creating / adding annual update reports through FY2023.

Rationale – The 2016-2020 Strategic Planning Report is a document that has been published and, as such, provides an historical overview of what was intended and accomplished between 2016-2020. It is not a “living” document and, therefore, we recommend leaving the existing title and content intact. We do, however, believe that annual update reports should be created and published, as .pdfs, via the Sustaining Excellence website. Doing so will convey the ongoing nature of, as well as continuing accountability for, the implementation of the current plan.

RECOMMENDATION 3

JPB further recommends the following general actions related to strategic planning:

- a. Extend the timeframe for implementation of the existing plan to the end of FY2023.

Rationale – Extending the timeframe to the end of FY2023 provides the institution two academic years to recover from the COVID-19 pandemic before fully engaging a new strategic planning process. Naming a year, however, also provides the institution an “end-point” for accomplishing the goals of the existing plan and a “beginning-point” for considering the work of a new planning process.

- b. Establish the process, timeline, and staffing options for developing a new strategic plan.
 - By Oct. 1, 2022, present the process and staffing options for developing a new strategic plan.
 - By Sept. 1, 2023, begin the new strategic planning process.

Rationale – The Higher Learning Commission expects institutions of higher education to operate under the auspices of a current strategic plan. Beginning the planning process in FY2024 will allow us to have a new plan in place by the time of our next reaccreditation review. Taking FY2023 to establish the process and timeline will provide ample time for considering how best to conduct our overall planning process (e.g., will we use a consultant and, if so, how will we select them; will we use shared governance committees; what range of time will the planning process cover vs. the implementation process; etc.). In addition, because of the heavy lifting required to engage with strategic planning processes and given the recommendations from the previous Special Assistants to the Provost for Strategic Planning, UWL should consider optimal ways to staff the strategic planning process before it begins. Adjustments can be made, where it makes sense to do so, as staffing needs shift during the planning and implementation phases.

This approach, then, will have the institution begin the actual planning process in FY2024. For instance, if we intend to use a consultant, this timeframe will bring them to campus in FY2024. Likewise, if we intend to facilitate the planning process internally, we will commence the planning work (e.g., focus groups, work teams, etc.) in FY2024.

- c. Communicate regularly, via all available means, the status of the existing plan.

Rationale – In large part due to the fact that UWL’s coordinating position for strategic planning (i.e., the Special Assistant to the Provost for Strategic Planning) ended in May 2020 along with the COVID-19 disruption, a concentrated and visible focus on the strategic plan has

diminished in FY2021. For instance, the JPB agenda in 2020-21 has not included a “strategic plan update” item, as has typically been the case the previous 5 years. We believe this item should be a regular part of the JPB agenda as well as a standing point of discussion and accountability among UWL departmental, divisional, and executive leaders.

RECOMMENDATION 4

Finally, JPB recommends the detailed items below in response to Chancellor Gow’s charge letter item 1. (c) which reads: *Please make a recommendation regarding how the language suggested by our Joint Committee on Environmental Sustainability might be incorporated into our Sustaining Excellence strategic plan website and 2016-2020 Strategic Planning Report.*

- a. Collaborate with JCES to identify interim steps towards environmental sustainability progress that can be initiated prior to the development of a new strategic plan.
- b. Prepare the campus community for considering the inclusion of environmental sustainability in the new strategic planning process to begin in FY2024.

Rationale – Environmental sustainability is, without question, one of the key concerns of our time. UWL’s Joint Committee on Environmental Sustainability has worked tirelessly to raise this concern across campus. Their document titled “JCES Goal Integration Proposal” thoroughly lays out how environmental sustainability might be integrated into the existing UWL Sustaining Excellence Strategic Plan. Despite this excellent work on what is undoubtedly an issue that many of us wish to support, it is important to note, however, that environmental sustainability was raised on multiple occasions during the last strategic planning process without garnering sufficient support for its inclusion in the 2016-2020 Strategic Plan. Despite support from the Chancellor and several shared governance groups, formally integrating environmental sustainability into the existing strategic plan would require re-opening the planning process for discussion and debate. We do not believe the institution currently has the capacity to re-engage planning at this time. Thus, despite our ultimate support for the spirit of the JCES Goal Integration Proposal, we do not recommend opening the planning process to integrate environmental sustainability into the existing plan.

We do believe, however, that it is possible for the Chancellor to work with JCES to identify interim steps that would allow the institution to make progress on environmental sustainability while simultaneously preparing the campus to consider the global climate crisis in the next strategic planning process. For instance, many of the items in the JCES Goal Integration Proposal can be accomplished without being integrated into the UWL Sustaining Excellence Strategic Plan. We believe the Chancellor can provide leadership on these ideas without re-engaging the planning process necessary to legitimately incorporate them into the existing strategic plan. This leadership will be critical in preparing the UWL community for full consideration of environmental sustainability in the next planning process.