



UNIVERSITY OF
CALGARY

Start something.

STRATEGIC PLANNING

Workshop Discussion Guide

BACKGROUND | THE UNIVERSITY OF CALGARY'S STRATEGIC PLAN

What is the strategic plan?

The *Institutional Strategic Plan* defines 1) the goals of the University as a whole; 2) the measurable objectives we establish in support of those goals; and 3) the strategies that we will use to reach those goals.

The Strategic Plan articulates what makes the University of Calgary distinct from other Universities and other organizations with the same goals and lays out our priorities for spending, focus and resource allocation. In performing these tasks, it defines the shared mission and the vision for our university.

Our previous strategic plan, *Eyes High*, set out a goal of becoming a top-five research university and ran from 2017-2022. The next strategic plan will run from 2023-2030.

How it fits with other plans

The University of Calgary is a complex environment where tens of thousands of people work towards collective, shared and individual goals.

No one strategic plan covers the entire range of work done at the University of Calgary and plans are constantly being updated to reflect evolving landscapes, priorities and understanding of best practice. Collectively, our plans define our academic, research and operational environment, as well as our connections to the broader community.



Figure A. Strategic Plan in relation to other University of Calgary Plans. Representative sample, not comprehensive.



Institutional Strategies to Address Core Commitments

Strategies that address core commitments agreed to by the University’s Board of Governors and General Faculties Council. All of our work is – and all other plans are – considered and interpreted in their context

Strategic Plan

The goals of the University as a whole, how we measure progress and the strategies that we use to reach those goals – **what makes the University of Calgary distinct.**

Operational Plans, Portfolio Plans, Faculty Plans

The operational, portfolio and faculty plans outline area-specific targets as well as **how we meet the objectives set out in our institutional strategies and strategic plan.**

PLANNING IS AN ONGOING EXERCISE

Due to the breadth, size and scope of activities at a major research university such as ours, there is never a time when planning is “done”. It is a fluid process where plans are updated at regular intervals. When updated, plans look to each other to inform their contents – and the university’s institutional strategic plan is no exception. As plans are updated, they:

- › Build upon previous versions of existing plans
- › Articulate a shared approach to the goals, objectives and strategies of supporting plans
- › Incorporate the goals, objectives and strategies of more broad-based plans
- › Integrate and take into consideration the goals, objectives and strategies of complementary plans

The IECB framework for strategic planning

Strategic plans at the University of Calgary are developed using the **IECB framework** that brings together:

- › Internal data sources such as existing strategic plans and decisions that have been made to date on the direction of the University;
- › External data sources such as provincial government frameworks, federal strategies and sector-wide planning documents as well as market analyses and reviews of the political, economic, social, technological, environmental and legal forces that drive decision making;
- › Consultation with the affected groups both internal to our University campuses and within the broader community; and
- › Best practices as articulated and proven by the global community of scholars and professionals who study strategy, planning, higher education, culture and other related topics.

The framework strikes a balance between: where we have been with where we want to go; expertise and community opinion; and the need to set clear, inspiring direction but also ensure the plan encompasses the breadth of activities that occur at a research university.

Building on Eyes High

Eyes High set a marquee goal of being a “top five research university” and established three goals, described as foundational commitments:

- › Sharpen focus on **research and scholarship**
- › Enrich the quality and breadth of **learning**
- › Integrate the university with the **community**

These goals were supported by a strategy statement that declared: “In this spirited, high-quality learning environment, **students will thrive** in programs made rich by **research, hands-on experiences** and **entrepreneurial thinking.**”



| GROUND RULES FOR TODAY'S DISCUSSION

As we participate in this workshop discussion, we hope you will make the following commitments so that every participant is able to engage and feel valued:

- 1. I will participate fully in a direct and honest fashion.** I will engage in our workshop – through conversation, through the completion of activity sheets and through written feedback during or after the event – as my comfort level allows.
- 2. I will treat my fellow participants with respect.** While we come to these workshops with different backgrounds, different experiences and different lengths of relationship with the University, I will treat all input as having value. I won't question the motives of my fellow participants and I won't diminish the worth of their opinions.
- 3. I will make space for my fellow participants.** I will share my opinion, but make sure I am allowing others to share theirs as well. I will be mindful to not dominate the conversation and I will encourage everybody's participation. I will be patient and I won't interrupt.
- 4. I will stay on agenda and on topic.** To respect the time that everybody here has invested in the process, I will try to stay on topic, and I will follow the time limits and other rules set by the facilitator(s).

| GET TO KNOW YOUR GROUP

Welcome!

Please take a minute to introduce yourself to the other participants in your group.

- › What is your name?
- › What is your connection to the University?
- › What are you most excited to talk about today?
- › What did you have for breakfast today?

GOALS

Background

The University of Calgary can measure success in many ways – from learning outcomes to community impact. In our previous strategic plan, *Eyes High*, an overarching goal was established of the University of Calgary being a top-five research university. This had many key features we look for in a goal:

- › **Aspirational.** The goal was a significant advancement from the University of Calgary's standing at the time.
- › **Attainable within the timeframe.** While ambitious, it was possible to reach the goal over the period of the strategic plan.
- › **Encompassing.** The goal could be used across the University, not just in one area or discipline.
- › **Measurable.** We could measure whether we were on course, which provided focus and made the goal more concrete.

While *Eyes High* has been used as an example, the next goal does not need to be about research – or rankings. As well, there does not need to be only one goal – though that is often helpful and can help unite a community.

Activity

Let's now think of our next strategic plan. As a group, try to answer these two questions. Identify one group member to document your group's thoughts on the provided worksheet and another team member to report your group's discussion and conclusions back to the whole.

1. When you think about our next strategic plan, what could be a goal for the University of Calgary?

(consider...)

- › What do I hope the University of Calgary will become?
- › For what do I want the University of Calgary to be known?
- › What would make me proud?
- › What does our community need?
- › What would unite us?

2. How would you measure progress towards that goal?

(consider...)

- › How do we know if we're reaching our goals?
- › What measurements already exist?
- › What measurements can we create?
- › What are the pros and the cons of the measurement we're considering?

CULTURE AND VALUES

Background

As a university achieves its purpose, it does so while remaining true to its culture and values. Culture and values can be either formal or informal.

Formally, the University has stated commitments to, among other values: sustainability, Indigenous reconciliation, equity, diversity, inclusion, accessibility, mental health, global engagement and shared governance.

Our informal values are the sum of our approaches and aspirations as a community. Often, over time, informal values are enshrined as formal values and provided institutional support and recognition.

Accessibility	Bold	Collaborative
Community	Compassion	Creativity
Critical thinking	Diversity	Excellence
Fun	Future focused	Inclusive
Integrity	Pragmatism	Resourcefulness
Respect	Results-focused	Sustainability
Welcoming	Wellness	

Figure B. In December 2022, 358 University of Calgary students, faculty and staff were asked what words they want to describe our culture. These are the most common answers.

Activity

Let's now think of our next strategic plan. As a group, try to answer the following question. Identify one group member to document your group's thoughts on the provided worksheet and another team member to report your group's discussion and conclusions back to the whole.

How would you like people to describe the University of Calgary's culture and values in 2030?

(consider...)

- › What words come to mind? Why?
- › What do you think is missing or deficient in our current culture?
- › What do you love about our current culture that you'd never want to lose?

STANDING OUT

Background

Major research universities often distinguish themselves from each other through the type of learning they emphasize, the communities they serve or through the general way they approach things.

Distinctive Academics Program Variety Program Quality Unique Programs Stackable Credentials Flexible Delivery Flexible Scheduling Pedagogical Method Class Size	Distinctive Student Services Advising Mental Health Career Services Financial Aid Support Technology	Service Quality Levels Personalized Service One-Stop Service Concierge Service Peer-to-Peer Service	Student Experience Study Abroad Student Organizations Service Learning Athletics Co-Ops / Internships Facilities Student Research
Special Services for Target Students Targeted Demographics First-Generation Transfers Adult Learners International Special Needs Military	Student Outcomes On-Time Completion Student Debt Employment Earnings Awards and Recognition	Staff Characteristics Credentials Background Teaching Experience Industry Experience Technical Expertise Availability	Shared Values Sustainability Social Justice Community Service Wellness Outdoor Life Innovation
Distinctive Location Proximity Beauty and Climate Cultural Attractions Recreation Options Regional Economy	Partner Networks Alumni Community Employers Industries Global Research	Pricing Low Net Price Low Price Relative to Competitors Predictable Price Payment Options Need-Based Aid Merit Aid	Brand Character Exclusivity Quality Higher Purpose Value for Money Lifestyle Disruptive

Figure C: Excerpt from EAB “Dynamic Strategy” Presentation, September 2022

Universities are not just compared to other universities. For staff, the choice may be between working at the University of Calgary or working for another company. For members of the public, the choice might be between donating time and funding to the University or another charity.

Activity

Let’s now think of our next strategic plan. As a group, try to answer these two questions. Identify one group member to document your group’s thoughts on the provided worksheet and another team member to report your group’s discussion and conclusions back to the whole.

How should the University of Calgary stand out in 2030...

1. ...from other Universities?
2. ...from other organizations (employers, charities, etc.)?

(consider...)

- › What makes us special? What could make us special?
- › Why did you decide to come to the University of Calgary? What keeps you here?
- › Why would you enroll at the University of Calgary instead of [X]?
- › Why should you give or volunteer with the University of Calgary instead of [X]?

PRIORITIES AND IMMEDIATE ACTIONS

Activity

Let's now think about our University. As a group, come up with as many answers as you think is appropriate for this question. Identify one group member to document your group's thoughts on the provided worksheet and another team member to report your group's discussion and conclusions back to the whole.

What could the University of Calgary do today that would have the greatest positive effect?

(consider...)

- › What would help us best reach our goals?
- › What would help us best establish the culture and values we desire?
- › What would help us best stand out?
- › What are the "quick wins"?
- › What single action would have the most positive impact in your faculty/unit?
- › What single action would have the most positive impact in your job?
- › What do you need from the University that you don't have right now?
- › What do you have too much of?