



UNIVERSITY OF
CALGARY

Start something.

**STRATEGIC PLANNING
RESEARCH FOCUS**

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, goals for research in the next strategic plan do not need to be about 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 research and innovation?

(consider...)

- › What are we trying to accomplish with our commitment to research and innovation?
- › What groups are we trying to help with our research enterprise?
- › 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?

STANDING OUT

Background

In addition to establishing research areas of focus, universities can differentiate their research enterprises from one another through the investments they prioritize; the systems they build, and the culture they foster. Possible ways for a university to stand out in research include (but are not limited to):

- › **Research infrastructure** such as labs, facilities and data centres.
- › **Project funding** for activities that support research activity such project management, data collection and analysis, field work and travel.
- › **Processes and workflows** that either simplify or add extra rigour to management of research projects.
- › **Collaboration opportunities** within faculties, within the university, within academia, and with industry, civil society and other parts of the broader community.
- › **Expanding access to research** through an emphasis on dissemination of knowledge, public engagement and commercialization.
- › **Research opportunities** for undergraduate students, graduate students, staff and members of the broader community.
- › **Faculty supports** such as additional research time, research assistants and more administrative supports.
- › **Student supports** such as higher wages, expanded career services and pathways to permanent positions.
- › **Fostering a unique culture** that emphasizes values such as individual or group achievement, excellence, practicality, commercialization, public good, equity, diversity, inclusion and accessibility, international focus, etc.

Such ways to stand out can be encouraged through a combination of central funding decisions, the creation of programs and individual incentives, and the building of physical and social infrastructure such as centres or institutes.

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.

In 2030, how should the University of Calgary stand out in its approach to research and innovation?

(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 want to be a researcher at the University of Calgary instead of [X]?
- › What could our approach to research and innovation offer students, faculty, staff and the community?
- › What investments, systems and culture would we need?

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 on meeting our goals for research and innovation?

(consider...)

- › What would have the biggest positive effect on research and innovation?
- › 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?