

Purpose

The University of California, Riverside aims to implement an institutional-level strategic planning process, and to derive from the process a strategic plan that will guide the University past the expiration of its current strategic plan in 2020. The strategic planning process should be collaborative and inclusive, and should engage broadly and deeply with our diverse set of campus stakeholders. The process also should be informed by both internal and external sources that address relevant factors such as current strengths and weaknesses, emerging challenges and opportunities, and demographic, technological and economic trends impacting the University. The strategic plan should capture the mission, vision and values of the campus and should serve as a guide for future decision-making to help the campus effectively pursue its mission and achieve its vision. The plan should provide guidance for successful implementation, including the development and use of metrics for assessing progress towards objectives in the plan. In some cases, the plan may include specific objectives, goals and metrics, as appropriate. The plan also should provide guidance for updating the plan in the future, in light of assessment outcomes and changing conditions.

Background

The University's last campus-level strategic planning effort occurred just prior to 2010 and led to the current strategic plan, [*UCR 2020: The Path to Preeminence*](#). The collaborative process that produced [UCR 2020](#) was entirely internal, led by the Provost and Executive Vice Chancellor. UCR 2020 identified four strategic goals to guide the University's development in the 2010s: Academic Excellence, Access, Diversity and Engagement. The plan also established the overarching goal of achieving the profile of an AAU (Association of American Universities) member institution. UCR 2020 has served the University well and we have achieved an AAU profile by many, but not all, metrics. It is now time to refresh our strategic vision in light of the progress we have made and the new challenges and opportunities that lie ahead.

UCR's Chancellor and Provost/Executive Vice Chancellor (PEVC) have already provided some structure for the new strategic planning process. The PEVC will chair a steering committee that includes Academic Senate leadership, student leadership, selected deans and vice chancellors and the chairs and vice chairs of five workgroups (all of whom are faculty). The memberships of the five workgroups also have been established, as have their respective foci: (1) Unparalleled Student Experience, (2) Research and Scholarly Distinction, (3) Contributions to the Public Good, (4) Thriving Campus Community, and (5) Sustainable Infrastructure, Operations and Finance. In addition, two cross-cutting themes have been identified: (1) research/creative activity, and (2) diversity, equity and inclusion. Two to three additional themes will be identified after consultation with the campus community in early fall quarter.

The Chancellor and PEVC also have indicated that part of the strategic planning process will be to envision UCR at its centennial in 2054 to help guide our shorter-term planning. We also anticipate producing a new plan that does not have an expiration date, but rather is more of a dynamic, living document that is revised as conditions warrant.

Process and Format

Beyond this background information, UCR has not laid out a specific process that we will follow to produce the updated strategic plan. We are looking for guidance from Consultants in developing these specifics. However, any process must adhere to some key principles:

- **Inclusivity.** Inclusion not only is part of UCR's identity but also helps to produce better ideas and work products. The process will be deliberately inclusive and consultants must help to ensure that all perspectives are welcomed.
- **Broad engagement.** The process will be highly participative and will engage our broad base of stakeholders, both internal and external to the campus. This includes students, staff, faculty, emeriti, alumni, community members, public and private partners, and others who have a stake in our future.
- **Transparency.** The process will be open and transparent. Consultants must help to achieve this in multiple ways, including supporting clear and frequent communication with the campus community.
- **Effectiveness.** The process will engender trust and foster participation among stakeholders, and will produce a strategic plan that the campus community believes in.

UCR is not looking for a large team but rather a small group of high-level individuals who will serve as facilitators and thought-partners to the steering committee and workgroups. Consultants will be expected to: help design and implement a process that adheres to the key principles above; equip workgroup chairs with tools to effectively pursue their charges; participate (in person or remotely) in at least some steering committee and workgroup meetings, and facilitate discussions as needed; ask challenging questions and guard against common pitfalls; provide informed external perspectives that add value to the planning process; help to interpret and synthesize information produced by the process. Consultants will not be responsible for production of final planning documents but will provide written summaries and other intermediate work products (e.g. presentations) that capture and preserve important outputs of the planning process.