

March 17, 2020

UCR Strategic Planning Next Steps for the Steering Committee and Working Groups:

Context

With the cancellation of the March steering committee meeting, we want to update you on the immediate next steps and how these fit into longer range plans for the steering committee and working groups. There are two near-term goals:

- Examine the preliminary frameworks developed by the working groups to get a sense of their “cases”—that is, the goals in their respective areas that they will recommend for UCR and some of the initiatives and activities they believe the University should pursue to reach these goals.
- Based on the preliminary frameworks and discussions of the steering committee and working groups, begin to identify overarching strategic goals for the University to serve as “pillars” of the new strategic plan.

In the coming months, we will head farther down both these paths while bringing them together in the form of a UCR strategic plan. The working groups will develop and finalize their respective reports. And the steering committee will have iterative discussions of how to weave the recommendations of the working groups into a set of bold and achievable goals for UCR as a whole.

This will result in two deliverables by the end of June: a set of final reports from the working groups and a framework for the UCR strategic plan. The former might be posted on the strategic planning website to stimulate further campus-wide discussion of the five working group topics. The framework will be the blueprint for the steering committee’s work during the rest of 2020 developing the full strategic plan.

Plans for March and April

In place of the cancelled March meeting, we will conduct three separate virtual “breakout” groups using Zoom, each with six or seven members of the steering committee. (Dates and group assignments will be determined based on responses to a Doodle poll.) Everyone participating must have reviewed the working group preliminary frameworks that have been uploaded to the SC shared drive *in advance of the meeting*. Each group will be charged to identify four to six overarching University-wide strategic goals to serve as pillars of the strategic plan, drawing on ideas in the working group preliminary frameworks and the discussions of the steering committee. Each breakout group will prepare a written summary of its work and post it on the shared drive in a designated folder.

Based on these summaries, past discussions of the steering committee, and interviews conducted by AKA, the Provost’s Office and AKA will prepare the first draft of a framework for the University strategic plan. This draft will be the focus of discussion at the April 14th steering

committee meeting and posted on the shared drive for review in advance of that meeting. (There will also be time allotted for each WG to give a quick update on its progress.)

With the April meeting, the steering committee discussions will include a greater focus on University-wide goals and strategies, as the committee works to develop and reach consensus on a framework for the UCR strategic plan by the end of June. Concurrently, the working groups will complete their research and analyses and continue shaping their reports for delivery in June. This should include recommending strategies and initiatives that will help attain the University-wide goals that will be suggested in the April draft of the framework for the UCR strategic plan. In this way, the working groups' efforts will not only result in their final reports but also help shape the framework of the UCR plan and elaborate that framework into a full strategic plan.

Strategic Planning Steering Committee Virtual Breakout Group Instructions and Time Table

Before the Session

Please review all of the preliminary frameworks in the “Preliminary Frameworks for March 12th” folder in the Google shared drive. It is essential that you have read and thought about these before you participate in the breakout group meetings.

Working groups are encouraged to revise their frameworks as they wish in the next few weeks. As you do this, however, please replace old versions with the new ones in the folder. (Do not keep both in the “Preliminary Frameworks” folder.)

0:00 – 10:00 minutes (elapsed time): Assembly and Introduction

Please join the Zoom promptly, preferably having tested your video and audio in advance.

- Goals for the session – *Tom Smith or Ken Baerenklau*
- Review plan for session and answer questions – *AKA*

10:00 – 20:00 minutes: Organize Group

- Designate one person as note-taker and another as writer. (They may share these duties.)
 - *Writer:* Prepare a brief written summary of the group’s conclusions and recommended UCR strategic goals following the meeting. (More information below.)
 - *Note-taker:* Record details of the discussion as basis for the written summary.
 - One of these individuals should use the Zoom shared screen function to record key points of the discussion in Word, PowerPoint, or any other preferred application. This will create what is essentially a virtual flip chart so that all participants have this in front of them for reference during the discussion.
- Designate someone to keep track of time and let the group know how much remains.
- One of the AKA consultants will join each group to assist as needed. Tom Smith, Ken Baerenklau, and/or Julia McLean (Provost’s Office) will join some of these meetings.

20:00 – 50:00 minutes: Discussion

Based on the preliminary frameworks prepared by the working groups and discussions in past steering committee meetings, please identify 3-6 overarching strategic goals **for the University** to serve as the “pillars” of the new strategic plan.

In doing this, feel free to build on the working group goals in any way you wish:

- Extrapolate from them to a “whole-UCR” level
- Combine several goals or parts of them into superordinate goals
- Revise and recombine

- Borrow a working group goal in its entirety if it seems appropriate at the University level
- Ignore a working group goal if its focus seems at too low an altitude or too narrow to be a goal for the University as a whole
- Come up with an entirely new University goal if you believe it addresses important issues not covered by any of the working groups directly.

Remember, these are to represent [University-level goals](#).

50:00 – 60:00 minutes: Review and Reach Consensus on UCR Goals

The note-taker or writer should review the proposed strategic goals with the group, making sure there is consensus on them and that everyone is clear about any areas of significant disagreement.

Following the meeting

The writer should convene briefly with the note-taker to review the meeting conclusions. The writer should then prepare a written summary of the University strategic goals identified by the group, including a line or two of explanation or rationale (if not apparent) and noting any interesting points of debate or implications. Please try to keep this summary to no more than 2 pages. The summary should be posted to the Google shared drive within 24 hours of the breakout session.