



# Strategic Planning Meeting

November 19, 2007

## In Attendance

### Steering Committee:

- |   |  |  |
|---|--|--|
| <input checked="" type="checkbox"/> Dr. Thomas George | <input checked="" type="checkbox"/> Dr. Glen Cope  | Dr. James Krueger                                |
| <input checked="" type="checkbox"/> Nasser Arshadi    | <input checked="" type="checkbox"/> Tom Eschen     | <input checked="" type="checkbox"/> Tim Farmer   |
| <input checked="" type="checkbox"/> Bryan Goers       | <input checked="" type="checkbox"/> Curtis Coonrod | <input checked="" type="checkbox"/> Karen Pierre |

### Planning Committee:

- |   |   |   |
|---|---|---|
| <input checked="" type="checkbox"/> Glen Cope                               | <input checked="" type="checkbox"/> Julie Sebastian   | <input checked="" type="checkbox"/> Keith Womer     |
| <input checked="" type="checkbox"/> Mark Burkholder                         | <input checked="" type="checkbox"/> Theresa Thiel     | <input checked="" type="checkbox"/> John Hylton     |
| <input checked="" type="checkbox"/> Bob Bliss                               | <input checked="" type="checkbox"/> Amy Arnott        | <input checked="" type="checkbox"/> Larry Davis     |
| <input checked="" type="checkbox"/> Charles Schmitz                         | <input checked="" type="checkbox"/> Kevin Truman      | <input checked="" type="checkbox"/> Tom Walker      |
| <input checked="" type="checkbox"/> Judith Walker deFelix                   | <input checked="" type="checkbox"/> Peggy Cohen       | <input checked="" type="checkbox"/> Joel Glassman   |
| <input checked="" type="checkbox"/> Curt Coonrod                            | <input checked="" type="checkbox"/> Greg McCalley     | <input checked="" type="checkbox"/> Kamran Ahmed    |
| <input checked="" type="checkbox"/> Nasser Arshadi                          | <input checked="" type="checkbox"/> Jean Bachman      | <input checked="" type="checkbox"/> Miranda Dorn    |
| <input checked="" type="checkbox"/> Wesley Harris                           | <input checked="" type="checkbox"/> E. Terrence Jones | <input checked="" type="checkbox"/> Barbara Kachur  |
| <input checked="" type="checkbox"/> Matthew Keefer                          | <input checked="" type="checkbox"/> James Krueger     | <input checked="" type="checkbox"/> Joe Martinich   |
| <input checked="" type="checkbox"/> Karen Pierre                            | <input checked="" type="checkbox"/> James Richards    | <input checked="" type="checkbox"/> Timothy Wingert |
| <input checked="" type="checkbox"/> Larry Westermeyer                       | <input checked="" type="checkbox"/> Deborah Burris    | <input checked="" type="checkbox"/> Peter Heithaus  |
| <input checked="" type="checkbox"/> Pat Doaln                               | <input checked="" type="checkbox"/> Orinthia Montague | <input checked="" type="checkbox"/> Lois Pierce     |
| <input checked="" type="checkbox"/> Bob Samples                             | <input checked="" type="checkbox"/> Jim Tom           | <input checked="" type="checkbox"/> Lori Morgan     |
| <input checked="" type="checkbox"/> JoAnne Wilhearson<br>(for James Kruger) |   |   |

### **Executive Summary:**

- Reviewed the prior planning process to assess what worked and what improvements can be made.
- Discussed the Vision, Mission, and Self Concept and obtained input for possible editing. A small team led by Julie Sebastian was chartered to edit the Mission, Vision and Values as appropriate.
- Coordinated an environmental scan and agreed that all units will conduct a similar environmental scan within their group.





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## I. Opening Comment – Kickoff by the Chancellor

- Tom George observed that this planning process will be a shared process with leadership and participation by all present. He asked that we keep in mind that we are interested in a 5-year timeframe with room for periodic updates. Tom reminded us that the curators are looking for a new president of the system. This will impact UMSL in time.
- We now have SB 389 and other aspects of the political landscape are changing. We are approaching the point where individual units all have plans. We want to make sure that we have alignment among the unit plans and the overall plan.
- Glen Cope added that going forward we will have a rolling 5-year plan. Each year we will acknowledge progress and add a year. We will have a mechanism for reporting on annual process and the capability to add an additional year.

## II. Prior Plans

- **What worked in the previous planning process?**
  - **Annual update** through budget and planning committee request has been helpful. Made the plan dynamic.
  - **We have performed better against National Survey of Student Engagement.** Active and collaborative learning. Academic challenge. Fruitful contact with students and faculty. Supportive campus environment.
  - There has been **Faculty influence** on the budget and planning committee. This has been positive.
  - We are feeling **more in control of destiny** than waiting for direction from Columbia or Jeff City.
  - Made **progress in development and fund raising.**
  - We are **getting in touch with our identity** and making progress on internal and external marketing.
  - **Transparency has increased** measurably with information availability and decision-making openness now a part of our process.





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- Early in the action planning process, many of the **committees were consulted**. You can still see it on the website with input from committees and sub-committees.
  - **Students have an important voice** around UM-St. Louis.
  - There is a clear **coalescence around common problems**. For example, joint efforts are underway around retention.
- **What could be improved this time?**
- We still don't know what we are as a campus. Hard to get a clear vision with such as an amorphous organization. We still have **self-identity problems**. Low cost supplier of good quality education, the public research driver or the convenient option?
  - We **need more planning at the unit level** that then feeds up into the campus wide plan.
  - Might think about a **budgeting process that aligns** with feeding up from the units.
  - Need to take a **closer look at the data** now available. Have been ad hoc about this in the past. Environmental scan should take this into account. Part of this process includes a clear baseline.
  - Give more consideration to the staff infrastructure and **get the staff engaged** in the plan. Have presence of chair of staff association, student government and chair of faculty senate. Also have HR represented.
  - **Align goals with measures**. Must have measures for all goals.
  - **Give constituents we serve a chance to give input** and be involved in the process.
  - Our process should have **feedback from external constituents**. It is not yet built in, but will be part of accreditation process. There are both community and external constituent feedback opportunities. We did this the last time we undertook planning, too. Comments go to HLC and to us at the same time.





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### III. Process Overview (Team Make Up, Approach, Etc.)

#### ➤ Steering Committee:

Dr. Thomas George  
Dr. Nasser Arshadi  
Bryan Goers  
Dr. James Krueger  
Karen Pierre

Dr. Glen Cope  
Tom Eschen  
Curtis Coonrod  
Dr. Tim Farmer

#### ➤ Planning Team:

Glen Cope  
Mark Burkholder  
Bob Bliss  
Charles Schmitz  
Judith Walker deFelix  
Curt Coonrod  
Nasser Arshadi  
Wesley Harris  
Matthew Keefer  
Karen Pierre  
Larry Westermeyer  
Keith Womer  
John Hylton  
Larry Davis  
Tom Walker  
Joel Glassman  
Peter Heithaus  
Lois Pierce

Julie Sebastian  
Theresa Thiel  
Amy Arnott  
Kevin Truman  
Peggy Cohen  
Greg McCalley  
Jean Bachman  
E. Terrence Jones  
James Krueger  
James Richards  
Deborah Burris  
Kamran Ahmed  
Miranda Dorn  
Barbara Kachur  
Joe Martinich  
Timothy Wingert  
Jim Tom





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## Strategic Planning Phases

### ➤ Phase I

- Collate and synthesize background materials
- Individual unit internal/external environmental scan
- Review mission and baseline data, draft vision 2013

### ➤ Phase II

- Develop draft of Key Goals
- Review and edit Key Goals
- Review goals and develop Key Measures of Success
- Develop initiatives and accountabilities of Key Goals

### ➤ Phase III

- Develop draft of Action Plan 2013
- Review and edit Action Plan
- Edit and finalize Action Plan

### ➤ Phase IV

- Final Approval





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## ➤ Review Timeline (Confirm Meeting Dates)

1.	Launch Meeting	Nov. 19	126 JC Penny	1-4pm
2.	Steering & Planning	Jan. 23	126 JC Penny	1-4pm
3.	Steering Committee	Feb. 5	426 Woods	1-4pm
4.	Planning Committee	Feb. 11	126 JC Penny	1-4pm
5.	Steering Committee	Feb. 21	426 Woods	1-4pm
6.	Planning Committee	Mar. 4	126 JC Penny	2-5pm
7.	Planning Committee	Mar. 17	126 JC Penny	2-5pm
8.	Steering Committee	Mar. 27	426 Woods	1-4pm
9.	Budget & Planning Review			
10.	Senate Review			
11.	Provost Council Recommends to Chancellor			

### Comments:

- Terry Jones, Chair of budget and planning committee has asked what happens after step 8. We have a draft plan which then goes from B&P to Senate, Provost Council and recommendation sent to chancellor for final approval. Have time to get to Budget and Planning after that.
- Tom indicated that many committees had involvement. It is anticipated that this will be part of this process, too.





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### IV. How to Engage the Campus

- Provide updates to the standing committees, student government and staff association.
- Aside from the groups already named, who else needs to be consulted?
  - The public through our **advisory boards** (the individual unit leadership councils.) Also, **high profile community leaders** such as RCGA leadership and alumni association. Took the whole plan to a meeting of the **Chancellor's Council. Curators and System Administration** were consulted at breakfast meeting.
  - **Legislative caucus** (40 or so.)
  - SGA
  - **RHA** if specific to South Campus or housing.
  - Town Hall for community.
  - **Community college systems.**
  - Editors/press.
  - On campus engagement of department chairs.
  - **Community organizations** such as NCCJ, Hispanic Chamber, NAACP, Interfaith Council, STL Clergy Council, etc.
  - **State professional organization of guidance counselors.** MO ACAC.
  - **HRIP** – HR Inter-department Partnership.
  - **Strategically placed alumni** such as education, nurses, business.
  - **Groups of external partners** within individual units. For example, group of key chief nursing officers for CON.
  - **Key Communicators** – a group on campus.
  - Deans of graduate and professional schools within 200 miles of us
  - **Utilize My Gateway** to provide web access. Encourage students to access and provide feedback.





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## V. Mission, Vision and Positioning (Review and Brainstorm)

### ➤ Mission:

The University of Missouri-St. Louis is the land-grant research institution committed to meeting diverse needs for higher education and knowledge in the state's largest metropolitan community. It educates traditional and nontraditional students in undergraduate, graduate and professional programs so that they may provide leadership in the health professions; liberal and fine arts; science and technology; and metropolitan affairs such as business, education and public policy. University research advances knowledge in all areas, and through outreach and public service, assists in solving, in particular, problems of the St. Louis region and beyond.

Academic programs are enriched through advanced technologies and partnerships that link the University of Missouri-St. Louis to communities, institutions and businesses regionally, nationally and internationally. Its special commitment to partnership provides UM-St. Louis with a leadership role among public educational and cultural institutions in improving the region's quality of life, while its unique relations with two- and four-year colleges and universities promote seamless educational opportunities.

### ➤ Vision:

The University of Missouri-St. Louis will elevate its status as a premier metropolitan public research university. Its educational and research missions will increasingly advance the economy and culture of the region, and provide leadership at a national and international level.

### ➤ Self Concept Statement:

The University of Missouri-St. Louis is a student-centered, public research university in a vibrant metropolitan setting. We are an economic development resource connected to the St. Louis region and beyond through our research, alumni, internships and other partnerships. We create exceptional graduates through highly-regarded faculty and programs serving traditional and non-traditional students of diverse backgrounds.





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## Comments:

- The **self-concept is a distillation of the mission and vision**. We use it for marketing purposes to get right to the point. The self-concept statement has been used quite a bit for marketing.
- Mission and vision describe us. Say who we are and what we expect to be. This **mission is pretty general** and tries to represent what everyone does.
- Reference to STL region is a political problem for us. Name is fine. But, **if we talk about serving the STL region, we automatically get put under sister campuses**. We should question how much to say those words because it causes the flagship location to devalue us.
- Our **region includes more than half the of the population of the state** in a concentrated form.
- Premier, metropolitan, research university reverberates for some of us and makes us unique.
- **Some feel the mission is just too long**.
- Perhaps this supports a public perception that education is private good that we provide to students and that research is a public good that we provide to the region. We need to shatter this notion that educating students confers value to the student and not to the society. **Our teaching provides public good to the region and the state**.
- The **mission statement may be too inclusive**.
- Student centered is straight out of a former era. Move away from deliver programming and knowledge because learning is active. We had **discussed changing “student centered” to “learning centered”** when working on Self Concept.
- Reads as if we are **trying to mention everyone**. This is misguided and we should try for a mission statement that gets at some core.
- **Replace the mission statement with something the size of the self-concept**.
- Research and teaching which transcends our local region, state and even our nation. **Global research and teaching**. Use STL as a laboratory.
- **Institution could be university** and could add **student’s in front of “needs.”**
- **Mission is very flowery**, but disconnected with what we do.
- **One universal message for all audiences does not work for us**.
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- Could acknowledge our location and pay tribute to the tax payer without saying we are local.
- **International in scope, yet meeting local needs.**
- UM-St. Louis is created by the people of MO to create a world of research and learning.
- Research message may not be the priority to leverage.

### Action Item:

A small group was assigned to work on re-crafting the mission and vision. Glen Cope will serve as a resource to the group.

Julie Sebastian – Leader  
Terry Jones  
James Kruger  
Barbara Kachur  
Mark Burkholder  
Robert Bliss  
Karen Pierre  
Bryan Goers  
Pat Dolan





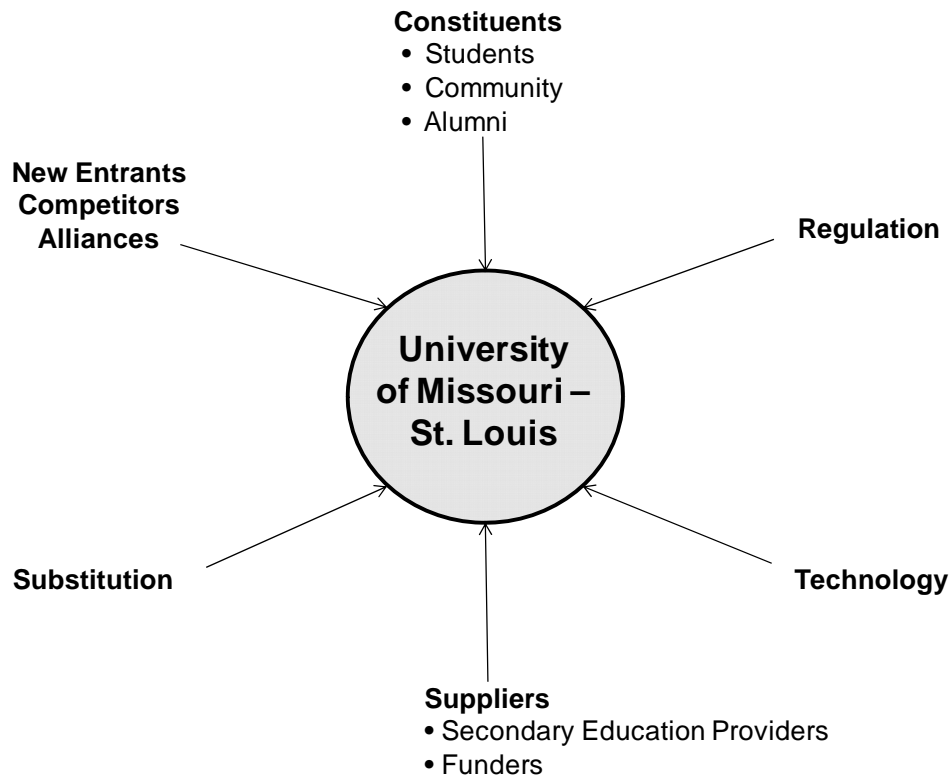
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## VI. Environmental Scan

- Introduce template and approach

# Environmental Scan



- Identify the trends that are currently underway and/or expected trends over the next few years.
- Trends can represent either an opportunity or a potential threat.
- Review each element of the above figure and identify the key trends associated with each.





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## I. Constituents

### a) Students

- 4000/11000 are 4 year students
- **Number of traditional college aged students is expected to decline**
- **Higher proportion expected to be female**
- **Increasing diversity** – international, disabilities
- **Decrease in quantitative capability** of the incoming student base
- **Students expect to be entertained**
- Students are expecting **more relative experiential learning**
- **Most students come from STL** and most work - not changing. (there are more working adults getting degrees)
- **Students are willing to borrow more** to get education

### b) Community

- Expectation for more 4 year degree students
- Don't have a strong political constituency
- **Increasingly international community**
- **Increasing desire to have input** and to see accountability
- **Region is growing in population**
- Community is expanding geographically (need to know the trends in the city itself) (East West Gateway)
- Revitalization of the city in population and economic status

### c) Alumni

- **Growing number** each year >75000 now
- **Sense of belonging is low**
- **Alumni status in the community is increasing** and they may have more financial ability to contribute
- Need to continue to improved the accuracy of addresses and telephone, contact information enough info on email addresses. Improving but not good enough.
- **Increasing number of alumni chapters**

## II. Regulation

- Senate Bill 389 resulted in a major increase in regulation
- Board of curators will increase regulation





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## III. Technology

- **Internet and technology in general has changed the way education needs to be delivered**
- Expectation to **incorporate consumer technology in education** (tie into ipod, realtime info access)
- **Increasing utilization by faculty**
- Higher student and community expectation for services utilizing technology
- **Staff is not keeping up with the technology changes**

## IV. Suppliers

- **Professional Staff**
  - **Cost to hire going up** faster than budget
  - **Aging work force**
  - **Increasing foreign faculty** and competition for them is now international
  - Expect **tenure to be flat**
  - **Increasing need for part time faculty**
  - **Make more use of non-tenure track faculty**
- **Funders**
  - **Public funding going down**
  - **Support from individuals and corporations is increasing at UMSL**
  - **Earned revenue is increasing**
  - **Increased alumni giving**
  - Higher percentage of **private donors** (use to be 25/75 now 50/50 private/corp)
  - Increasing constraints on state funding. Limits on how much we can charge





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## V. Substitution

- **On line** courses
- Courses led by **non-PhD**
- Substitute our courses with community college courses
- Using internet and video to **overseas universities**
- **Certification in place of degrees**
- Moving away from textbooks and handouts
- Non traditional student is now the majority

## VI. New Entrants, Competitors, Alliances

- **Strong community college presence** in the region. Highest per capita in the country
- **More competition for students** (Phoenix, Webster, Lindenwood, SLU, WU, Columbia, Truman, etc.)
- Other major institutions more willing to accept transfers
- Competitors selling the benefits of “part time” faculty
- **Trend toward creative two-tier pricing**
- Speed to degree and effort is less to get “ticket punched”
- SLU undergrad admission has grown 2-3 times in the past 10 years
- Corporations cutting back on services may provide an opportunity for “**outsourced**” **partnerships.**
- We are best at helping community college students complete their degree.
- Competition for federal research dollars. Many more multi site projects – could be an opportunity
- National science foundation renewing interest in education piece.





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### Opportunity for Entrepreneurialism

Why are we essential:

- Teaching students our research. We have to be nimble to get new knowledge
- Teach students how to manage uncertainty – analytical thinking
- Urban regions will be the economic engine – growing population. Puts us in a possible advantage
- If we can get our message out about the available 4 year experience.

### Parking Lot:

- Enrollment has been flat for a long time and we need to talk about what we should do about that.
- Might want to develop core values for our university that permeate all we do. We do have themes and the mission. The System has 4 values – access, affordability, quality and accountability and we tend to utilize them.
- We have to tell our story better so people know our capabilities.

