

The University of Texas System Strategic Planning Framework Proposal for 2005-06

Overview

The UT System has a set of interrelated planning responsibilities for the Board, System support for institutions, System Administration operations, and individual institutional plans. Over the past decade, leaders of The University of Texas System have developed planning documents approximately every five years. Since 2002, the System's administration and Board have begun to add new elements, change the System's planning framework, and introduce new planning processes. UT System institutions are being asked to plan more proactively and consistently through the Compact Process, the UT System's accountability framework establishes expectations for performance in certain high-priority areas, and presidents and officers now submit annual work plans that are also expected to align with these big goals.

It is time once again take a more comprehensive, integrated, and strategic approach to planning. Our vision is that by the end of the 2005-2006, each primary unit of the UT System – Board of Regents, System Administration, and UT System institutions will either have a strategic plan in place, or a commitment to update or develop one on a specific schedule. These plans will align with System-wide goals and priorities, but will provide considerable flexibility in format and content to reflect the distinctive missions of each unit. These plans will, moreover, align with the System's accountability framework and review of executive work plans, so that progress on key priorities is tracked, analyzed, and communicated widely to inform future improvement efforts.

The table on p. 4 illustrates the interrelationships and timing of these efforts.

Background

1995 - 1999. The University of Texas System Long Range Plan and Strategic Initiatives for the period 1995-1999 outlined goals and initiatives for students, faculty, patient care, community service, and organizational efficiency. Its viewpoint was System-wide, but it also included short highlights from each institution's plan that aligned with the broad goals and initiatives. It is the longest and most specific of the most recent plans, although it does not outline expected outcomes. In 1998, the System-wide mission statement embedded in this plan was updated.

2000 - 2004. In December 2000, The University of Texas Board of Regents adopted its new long-range plan, *Service to Texas in the New Century*. This plan lays out a vision for System leadership and directions to 2030, and reflects the System's commitment to address *Closing the Gaps*, the State of Texas master plan for higher education. It provides examples from many institutions, but does not document this alignment consistently, nor does it delineate expected outcomes in great detail.

2004 - present. In December 2002, the Board of Regents endorsed a new framework for accountability, linked to the themes and priorities laid out in the long-range plan and mission statement. In March 2004, the Board endorsed the System-wide mission statement originally written in 1998 and also approved a new mission statement for System Administration. Each institution completed its first Compact in August 2004.

The Current Picture

The UT System strives to exert creative and proactive leadership and foster alignment on significant education, research, and health care issues, and to use the System's convening and leveraging power to enhance institutional efforts. In doing so, it aims for high operational performance, reducing time spent on mandates and oversight, and increasing focus on leveraging resources and expertise within System administration and in support of UT System institutions.

More specifically, the UT System's strategic focus, directly or indirectly, is on these themes:

- Improving student success
- Increasing research
- Improving quality of health care
- Making a positive impact on the economy and on society (economic impact; tech transfer)
- Maximizing institutional synergy through collaborations
- Aligning resource development and investments
- Assuring integrity and public trust

Adding Value:

All priorities, strategies, tactics, on behalf of institutions AND on behalf of the System should add value to the big goals, above.

Planning Framework

The System addresses these (and many more specific goals and priorities) through an interrelated set of planning responsibilities:

1. Institutional planning. Support the planning process of UT System institutions and foster alignment among goals, budget, and resource decisions. The content of these plans emanates from the individual campuses, with support from the offices of Academic and Health Affairs.

In addition to their compacts, each institution will be asked to specify a timeframe in which it will develop an updated long-range plan. This timeframe should be aligned with institution needs, including the timeframe for SACS accreditation reviews. The plans will be shared with System officers and the Board of Regents, who will evaluate the fit between institution and System strategic themes and priorities, and recommend adjustments, as appropriate.

The intent is not to usurp primacy of institutions, but to clarify alignment and support of broad goals.

2. System planning. Develop a planning framework and alignment for the goals and priorities for the System as a whole and for each System administration office. The UT System Administration must fulfill certain legal responsibilities. In addition, it seeks to focus System office work on those areas that add value to UT System institutions. Its priorities, delineated in its mission statement, reflect this two-way responsibility; examples are provided below.

Currently, many offices do their own planning, and have an impact on System-wide planning, but we do not have a mechanism to integrate and align office planning and priorities. The UT System Administration should have a plan (not necessarily a formal compact or lengthy written report). In 2005-06, they will be developed in a strategic plan that will outline how these goals will be implemented over the next three to five years.

3. Board planning. Update the Board's statement of strategic vision. The Board of Regents has responsibility to delineate the big, long-range goals, priorities, and areas of emphasis for the UT System. Its most recent plan (2000) outlines areas of emphasis which are still significant in some ways, and many of its priorities are being addressed by the System and institutions. However, the plan as a whole is not being used as actively as a robust plan should be.

By elaborating on and prioritizing work at each level the System can develop a more robust and functional planning framework. Over the past two years, the UT System has begun to refocus and fill in

this planning framework (see table on p. 4). The Board of Regents accepted its first accountability and performance report in March 2004, and its second report in February 2005. Institutional compacts were completed, for the first time, in August 2004 and will be updated annually. The March 2004 Washington Advisory Group report recommended steps to enhance the research presence of eight UT System academic institutions. Health Affairs studies address high priorities including enhancements in graduate medical education, public health, and indigent care. Each UT System president and officer submits an annual work plan to the Chancellor; the Chancellor submits a work plan to the Board of Regents.

While the System need not undertake a conventional or mechanical strategic planning process, we recommend focused attention and development of updated plans, aligned with the System's current goals and priorities, on three interrelated levels: institutional planning, System planning, and Board of Regents planning.

By the end of the 2005-2006, each primary unit of the UT System – Board of Regents, System Administration, and UT System institutions – will either have a strategic plan in place, or a commitment to update or develop one on a specific schedule. These plans will align with System-wide goals and priorities, but will provide considerable flexibility in format and content to reflect the distinctive missions of each unit. The plans will, moreover, align with the System's accountability framework and review of executive work plans, so that progress on key priorities is tracked, analyzed, and communicated widely to inform future improvement efforts (see diagram, p. 5).

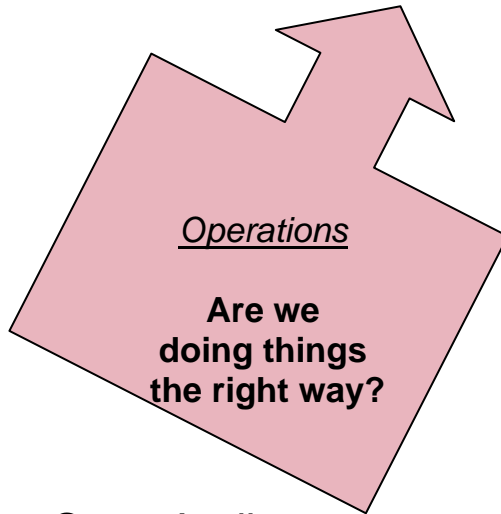
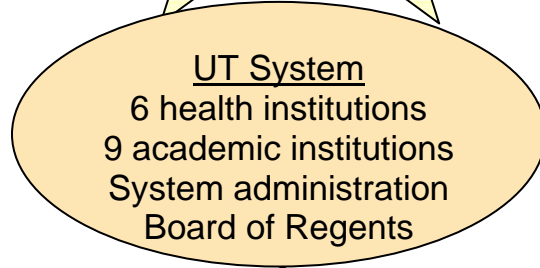
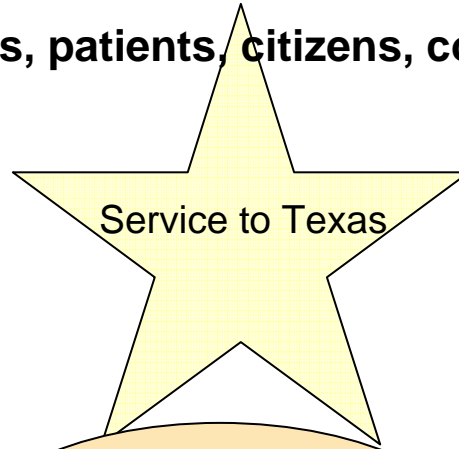
Timeline

- Brief Board on framework and timeline May 2005 Board meeting.
- Develop outline during spring and summer 2005.
- Implement planning discussions in fall and winter 2005-06.
- Complete System Administration and Board plans by spring 2006
- Complete institution plans in alignment with accreditation cycle.

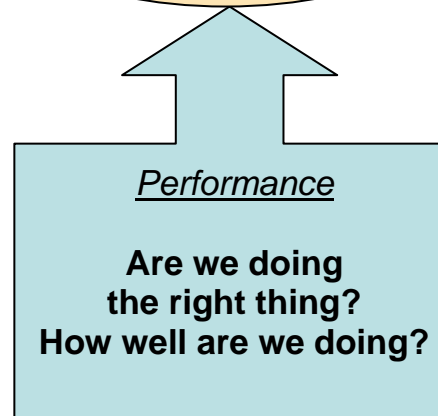
U. T. System Strategic Planning Framework and Timetable

Big Goals: <ul style="list-style-type: none"> ▪ Increasing student success (persistence, graduation, learning outcomes) ▪ Increasing research productivity (faculty recruiting, professional development, infrastructure development) ▪ Improving quality of health care, health profession education and outcomes for patients ▪ Making a positive impact on the economy (economic impact; technology transfer) 					<ul style="list-style-type: none"> ▪ Maximizing institutional synergy through collaborations ▪ Aligning resource development and investments ▪ Assuring integrity and public trust 			
System Planning Activities					Institution Planning Activities			
Planning Activities and Documents	Board of Regents Long Range Plan: "Service to Texas in the New Century"	UT System Mission Statement	System Administration Mission Statement	UT System Accountability and Performance Report	Compacts	Health Institution Strategic Plans	Academic Institution Strategic Plans and Related Activities	SACS Accreditation Preliminary Date of On-Campus Review (preparation begins 18-24 months in advance)
Cycle / schedule	2000-2030	Approved Feb. 2004	Approved Feb. 2004	5 year trends; annual updates	2-year horizon; annual updates	5-10 year horizon; periodic updates	5-10 year horizon; periodic updates	10 year cycle
2004-05	Health Affairs Retreat Academic Affairs Retreat		Retreats on: Mission statement roll-out August 2004 Officer work plans	2 nd edition	Update by August Track key benchmarks	Needed in 2005-06 UTMB to 2005 UTHSC-San Antonio to 2005 UTHSC-Houston	Presidents' Select Committee (UTA, UTEP, UTT) Commission Reports: UT Austin UTB/TSC UTEP UTT	UTMDACC (Spring 2005)
2005-06	Board planning activities Retreat Update plan		System and System office strategic planning Value-added analysis	Update and calibrate with State report	Drafts due May 1 Discuss at joint budget//compact meetings Complete by August	UTHSC-San Antonio planning process, completed Jan 2006	2-3 planning projects	UTEP 4.06
2006-07	Health Affairs Retreat? Academic Affairs Retreat?			"	"	UTHC-Tyler to 2007	2-3 planning projects	UTA Spring 07 UTPA Spring 07
2007-08				"	"		2-3 planning projects	UT Austin Spring 08 UTB/TSC UTHSC-Houston UTMB 4.08 UTHSC-San Antonio Spring 08
2008-09				"	"		2-3 planning projects	UTD UTSWMC
2009-10				"	"	UTSWMC to 2010 +in course adjustments UTMDACC to 2010 + in course adjustments		UTSA Spring 10 UTHSC-Houston 3.10 UTT Spring 10
2010-11								UTPB 12.10

Students, patients, citizens, communities



State Auditor



State Leadership



LBB

“Everyone is accountable, all of the time.”