

## UBC Strategic Planning Project Summary Highlights of Visioning Retreat and Initial Listening Consultations (Feb. 4-7, 2017) February 27, 2017

### Overview

Key themes for *UBC's Next Century* were identified during a visioning retreat of the UBC Executive team and Deans on Feb. 4, 2017 and in data-gathering interviews with a variety of UBC administrative, academic, staff and student leaders on Feb. 6-7, 2017. A recurring theme in these conversations was the desire that UBC's next strategic plan be both "energetic" and "bold."

This summary report captures high-level perspectives from two venues about the future opportunities and possible barriers to success – (1) a retreat of the Executive team and Deans and (2) face-to-face and telephone interviews with other leaders (and including in-depth conversations with some Executive team members and Deans):

- During a half-day retreat on February 4, the Executive team and Deans engaged in open, interactive and collaborative dialogue about UBC's opportunities at this time in its history and with the momentum already fostered by the leadership of its new president, Santa Ono, and potential barriers to achieving them.
- The Napa Group consultants conducted confidential one-on-one interviews with additional stakeholders on February 6-7 (about 20 deans, faculty, staff and students), who shared their candid views about expectations for UBC and the strategic plan as the university embarks upon its next century.

These activities served as a data-gathering and research exercise in the first phase of the planning project to gather insights and information about topics that key leaders believe should be included or addressed in UBC's new strategic plan. It was apparent that these participants seek in the next strategic plan an enterprise roadmap that creates focus – on UBC's strengths, its primary possibilities and how the university will differentiate its contributions to BC, Canada and the world.

### Executive Team and Deans Retreat

Framed by Simon Sinek's provocative question, "Why?", the Executive and Deans engaged in small work group discussions on two topics – (1) proposed visions for UBC as it begins its next century and (2) high-level opportunities and potential risks/barriers to achieving them. Despite an untimely snowstorm, the retreat facilitated video interactions between the Vancouver and Okanagan campuses.

Visions: Work groups consolidated their discussions into three visions. These visions have since been revised into a single statement, which is now being tested more broadly in the UBC community:

- "Creating knowledge and inspiring people for a better world"

- “By building and sharing knowledge, engage and inspire society to build a better world”
  - Alternatively: “Nurturing Ideas – Sharing Knowledge”
- “Learning and knowledge for a better world”
  - Alternatively: “Learning for a Better World”

In addition to these proposals, several voices also suggested testing:

- “Inspiring, challenging and engaging with society to build a better world.”

Opportunities and Barriers: Linking the visioning possibilities (the “why?”) to the realities facing UBC (“what” and “how”), the Executive and Deans work groups also engaged in diverging-converging conversations and exercises that identified the following as major opportunities for UBC’s next strategic plan:

- Location and culture
- Grand challenges and complex problems
- Health
- Student Experience
- (Note that Innovation and Education are horizontal concepts across these large topics.)

...And the following high-level risks and barriers to achieving them:

- Resources
- Structure and governance
- External forces

## Data-Gathering Summary and Observations

As noted above, this report also provides high-level perspectives from the retreat conversations and listening interviews and identifies several key areas that community leaders believe are vital topics for the strategic plan deliberations and UBC’s future course. This data-gathering summary, along with other data collected by UBC and the consultants, will be shared with the Steering Committee, who will begin to shape the plan’s framework for broader community consultation. (Detailed topics and comments from the listening sessions are attached below this summary.) Within some of these topics (such as rankings) it will be important to develop clarity and alignment with respect to key elements that might move forward into the strategic plan:

1. **UBC as a “world university”** – positioning the university as a “global UBC” to take advantage of its geopolitical location in southwestern Canada, its current strengths and aspirations, which were voiced throughout the early-February conversations. UBC’s orientation toward Asia (unlike other Canadian universities to the east “facing” Europe) is a potential advantage to be further pursued in a time of geopolitical and economic realignment.
2. **The role of rankings** – UBC has recently been recognized by the Times Higher Education survey as North America’s most international university based on a ranking system. An emergent

theme from the listening conversations is that those people we spoke to have differing views about whether and to what extent UBC should adopt a targeted global ranking strategy. Accordingly, this question should be a point of early discussion and engagement.

3. **A strategic research agenda** – an interdisciplinary research portfolio that (a) transcends, supports and mobilizes faculties, campuses and other sites; (b) accounts for the high-tech innovation agenda in the Province while focusing on a UBC-generated conception of innovation; (c) is recognized for its physical presence in the Province’s innovation “hub” and inclusion of such areas as the arts and social innovation; and (d) is defined around core platforms of differentiation and impact (e.g., transforming health, research commercialization and partnerships, sustainability, indigeneity and international presence in Asia).
4. **UBC Vancouver and UBC Okanagan** – clearly defining and articulating the roles, relationship and position of the two campuses with respect to UBC’s institutional footprint in British Columbia, as there are differing and sometimes conflicting views about this question. As with other university “systems” we have worked with, many interviewees, but not all, held the view that incorporating UBC-Okanagan’s evolution, growth, visibility and leadership into a Vancouver-Okanagan strategy would be an asset. The proponents of this approach suggest that it would demonstrate a broad presence in and contributions to the region; in effect, more explicitly leveraging the assets of each campus’ location, identity (academic and cultural) and diversity (including access and opportunity) to create, as one interviewee described, a “sense of not ‘place’ but ‘places.’”
5. **Students and the Student Experience** – cultivating the passion of many students, both undergraduate and graduate, and their desire to help shape UBC’s future identity. Student leaders are eager to engage other students in the strategic planning process and suggested multiple topics of particular interest to current and future students, including innovation and tech (e.g., more undergraduate research for students), career preparedness and paths to employment, investments in valuable faculty, the costs of education and its impacts on maintaining diversity, the economic burdens of living in Vancouver, support for international students, the first-year experience, improvements in the physical plant (housing, parking, amenities, transportation, easier access from around Vancouver), student engagement (including the large population of commuter students) and students as future alumni.
6. **Delivering a UBC Education** – continued investments in educational technology, moving to more flexible methods of learning and collaboratively harvesting the array of talent (e.g., faculty and IT expertise) to respond to new learning styles and methodologies and broaden access (online and virtual, downtown Vancouver, clinical sites and other venues beyond the Vancouver Point Grey campus). Some faculty leaders noted broader faculty interest to be engaged more actively in academic planning within schools, colleges and departments on topics such as learning methodologies, degrees and their relevance for students and resource allocations. Similarly, we were told that some faculty want to participate in timely ways to influence big decisions, such as purposeful growth, research capacity, markers of student success and academic integration of

the two campuses; they would value development of an institutional framework for inclusive conversations and reliable, trusted practices of dialogue prior to decision making.

7. **UBC Culture and Community** – From the “I am UBC” comments of students, to “we are alumni” (for about one-third of UBC staff), to the outstanding work environment sought in HR’s draft strategic plan, underscoring and strengthening shared identity in the UBC community was frequently mentioned as an opportunity to enhance the UBC experience. Questions that might be addressed include: How do we strengthen campus life and a sense of UBC belonging for all constituencies – from faculty emeriti who want to remain involved, to staff who support both faculty and staff, to a wide range of students with different needs (graduate, undergraduate, commuter, residential, online, etc.)? In the next decade, UBC’s workplace, like other higher education institutions and businesses, will undergo major changes as the now-predominant Baby Boomer generation retires and increasingly Millennials, with different work styles, become the next academic and administrative leaders, requiring leadership development, professional training and mentoring. An understudied question is how the needs of the intermediate generation might also be served institutionally. The strategy of streamlining processes and systems and thereby securing efficiencies was identified as providing a related opportunity for improving the institutional operating culture.
8. **The UBC Brand** – using the strategic plan’s aspirations to strengthen the university’s brand as part of institutional rebranding that may result from the planning process. The opportunities here include building on the university’s growing and emerging distinctions and contributions, the strategic plan’s priorities and focus, the popular new president, the optimistic energy in the UBC community and UBC’s competitive repositioning as a world university dedicated to grand, societal challenges.

## Next Steps

The strategic plan project plan is being finalized with a specific timetable through 2017, a communications plan, a community engagement plan and a series of strategic conversations guided by the Executive team and Deans. The representative Steering Committee, which will help shape the plan’s framework based on data-gathering and broad community engagement, will hold its first meeting on March 7. At the planning retreat in February and in selected follow-up conversations, the Executive team and Deans indicated a preference for several timely interactive sessions to align on the emerging plan’s priorities and to move the strategic framework forward into a final strategic plan and implementation and resourcing plan.