



February 20, 2015

To: Lane Earns
Provost and Vice Chancellor

From: Andrew J. Leavitt
Chancellor

Subject: Charge for Strategic Plan – Responsibility, Process and Timeline

The strategic plan for an institution is critical as it provides the platform on which a shared vision can be developed. A good plan not only articulates the necessary strategies needed to achieve goals and objectives, it provides an opportunity to have university-wide conversations about the collective values and vision for the university through the process of planning.

The strategic plan serves as a guide for the introduction of new initiatives and expansion of programs in times of rising budgets and as a way to prioritize what is important to the institution in times of budget cuts. Full engagement in a planning process by internal and external constituencies leads to a greater sense of ownership of the institution.

I charge you with the responsibility to plan, develop, and deliver a new Strategic Plan for the University of Wisconsin Oshkosh. This new plan should examine our mission, vision, values, and strategic direction. This strategic plan should emphasize institutional goals, strategies, and objectives. The development of tactics will occur in a separate process.

Please accept my deepest appreciation for your investment of time and energy through your service as the leader of this endeavor.

Details of the Charge

1. **Leadership.** You are to provide leadership, coordination and support to our strategic planning process.
2. **Charge.** In your role as the leader of this important effort, you will be responsible for providing the formal written charge to any committee or group that is formed to accomplish this end.

3. **Process Requirements.** The process you develop and use for developing our strategic plan should have the following characteristics:
 - a. **Inclusive.** The process should be inclusive – it should have broad ownership, participation and involvement. These efforts must include and actively involve all categories of our employees, students, alumni, community stakeholders and opinion leaders, external advisory boards, and elected public officials (from all levels).
 - b. **Transparent.** There should be many and multiple avenues for participation and involvement – through forums, discussion, and various approaches to gather and collect ideas, input and other suggestions.
 - c. **Clarity.** The depth and content of any background written document should be broad and deep; but the resulting written narrative of the plan itself should be very concise and tightly focused (e.g., maximum of three pages in length).
 - d. **Term.** The plan should cover a five-year period, whether calendar years 2016-2021 or focused on five academic years starting with 2016-2017.
4. **Considerations.** The planning framework can recognize the underpinnings of all prior planning efforts; but this new plan should not be constrained or limited in anyway by that conceptual structure.
 - a. **Accreditation.** It should also resonate with requirements found in the Higher Learning Commission’s reaccreditation standards and process.
 - b. **UW System.** The plan must be harmonious with the central aim and direction of the strategic plan under development by the University of Wisconsin System.
5. **Developmental Timeline.** The strategic plan should be developed over the course of the remainder of this academic year and through the end of the fall semester. The strategic plan should be presented for final review no later than December 31, 2015.
6. **Implementation of Tactics.** There will be a separate implementation phase commencing January 2016 and ending June 2016. Your process should consider Strategies, Goals, and Objectives. Tactics will be left to area expertise to develop and implement.
7. **Periodic Updates.** I would like to receive periodic updates from you on the status of the plan. Additionally, we will also ensure that the broader campus community, leadership team, and shared governance groups are informed and involved as these efforts continue.

cc: Leadership Council