

September 17, 2007

From: Alan Walker, President, and Jerry McCauley, Board Chair

Subject: UIU Strategic Planning Open Forum

Dear Colleagues:

As you know, UIU entered into a strategic planning process about a year ago. The rapidly changing and globally evolving education market and the need to position UIU strategically in a world that is both confusing and uncertain drove this decision. The most fundamental trust that we hold is to prepare today's and future generations of students for productive personal lives and professional careers. At its core, that is the compelling justification for this planning focus on our strategic future.

The next steps in the process are two all-campus open forums that have been scheduled for September 24 and 25, both at 3:30 p.m. in Baker-Hebron Auditorium (please note: the second is a repeat of the first). Our purpose in these open forums is to engage in a campus-wide dialog about UIU's emerging strategic direction as articulated in writing from several strategic planning committees that have prepared papers for your consideration. So that everyone who wishes to may view the open forum, they will be webcast via our own web site. Instructions for accessing the presentation appear at the end of this memo.

The open forums will be immediately followed by a 30-day public comment period, during which you will be invited to submit your thoughts and ideas in response to the strategic planning papers that will be posted on the UIU website. Comments expressed during the public comment period will be posted on the website. Public comments will be assigned to appropriate strategic planning committees for their consideration and public response (also to be posted on the website).

In this note our intent is to describe more fully the agenda that you can expect at the open forums and to summarize the step-by-step process through which the strategic plan has evolved.

First, let's talk about the process, how we got where we are. Over a year ago, a committee with representation across the University, chaired by a senior member of the faculty, created the critically important beginning when they led an inclusive exchange of ideas that resulted in a contemporary UIU mission and a vision of UIU's future. This was enormously important early work because it put in place a campus consensus that articulates who we are, the mission, and produced a vision that has served to guide the strategic planning work that followed.

The mission and vision, endorsed by campus constituents in late November 2006, was forwarded to the Board of Trustees for their consideration at their winter retreat in February 2007. With minor editorial changes, the following mission and vision statements have served as solid building blocks for all of the planning work that has transpired since:

UIU MISSION

Upper Iowa University provides student-centered undergraduate and graduate educational programs through flexible, multiple delivery systems in an environment in which diversity is respected, encouraged and nurtured.

UIU VISION

Upper Iowa University will be recognized and respected as an exceptional and ascending institution of higher learning, developing global citizens who become lifelong learners prepared for leadership within society.

A UIU Strategic Planning Steering Committee with wide membership from the faculty, staff, and Board of Trustees and with student and alumni representatives, was formed in March 2007 and has met since with regularity. The committee has made repeated use of the statements of mission and vision. They have used the *mission* to answer the question “Will the newly evolving strategic direction ensure that we are faithful to the promises of the UIU mission?” and they have frequently revisited the *vision* to answer the question “How can we act to ensure that we meet the challenges and fulfill the ambitions of the UIU vision?” You are being asked to join with the Steering Committee on September 24 and 25 to explore with them the answers to these same questions.

Following the adoption of the mission and vision statements, the work of the Steering Committee then focused on understanding UIU’s internal and external environments and on recommending the strategies, policies and programs necessary to the achievement of a comprehensive list of goals and objectives and on identifying the obstacles to those achievements.

The Steering Committee segmented the vision statement and conducted SWOT (strengths, weaknesses, opportunities and threats) analyses for each of the five principal components: Recognized and Respected, Exceptional and Ascending, Global Citizens, Lifelong Learners, and Leadership. The objective was to see in macro-dimensions what it would take to achieve the vision. In a very real sense this was a test of the credibility of the vision statement. What were the strategic, policy and operating implications of the vision statement?

That brings us to the agenda for the all-campus meetings. Satisfied that the vision statement was a credible strategic guide, the committee then turned to the development of an integrated view of UIU’s future and did so with a graphic representation of the plan. This “picture” shows the cumulative impact of the committee’s judgments as it identifies the critical components of the strategic path that lies ahead. You will find this “picture” attached to this memo.

At this point in the process, the committee became even more highly focused and split into six teams, each charged with bringing forward policy and programmatic recommendations together with their resource implications. From the attached chart you will see that the six teams (each has an identified leader) are derived from an overarching goal to “Develop Global Citizens” by creating “One Flat Global Campus.” The six team titles are: (1) Seamless Movement, (2) Curricular, (3) Co-Curricular, (4) Enrollment, (5) Information Technology and (6) Branding Communications. Finally, a seventh team was charged with understanding the financial implications of the planning work in a Financial Resource Allocation Model.

On September 24 and 25 and during the 30-day public comment period, you will have the opportunity to examine the conclusions and recommendations from each of these teams. The team leaders will be summarizing their work and answering your questions. So that you can reflect in advance of the meetings, we are forwarding to you via email the most current thoughts from each of the teams, along with an article on creating the global campus. These documents will also be accessible on the G drive, under “Everyone,” “Strategic Planning.”

Meanwhile, input from these open forums will also be combined with the results from several student focus groups during which there will be opportunity to get a student’s perspective on the strategic future of Upper Iowa and their reaction to our present planning efforts.

The work we do together over the next weeks and months will be critical to UIU’s future. We thank you for your thoughtful participation, but most of all for your dedication to helping us build a dynamic and inspiring university of the future while being respectful of our historic values and institutional heritage.