

**University of Illinois
Board of Trustees Strategic Planning Retreat
July 22, 2015**

Analytic Summary

This summary is intended as an overview of the major points of the July 22, 2015 University of Illinois Board of Trustees retreat. It does not represent formal minutes of the Board meeting, and for a large segment of the retreat – the small-group discussions – the Board was not in session. The outline below captures the points of the presentations and discussions at the retreat that are most relevant to the UI’s strategic planning process.

The Chair of the Board of Trustees, Ed McMillan, convened the retreat, welcoming the participants and turning the floor over to President Tim Killeen.

I. Hopes and Expectations for the Strategic Planning Process

After welcoming the participants, President Killeen described his hopes for the strategic planning process:

- The intent of the UI strategic plan is not to displace or supersede the plans of the individual campuses but rather to seek synergies among them, identifying potential points of collaboration and enabling the campuses to achieve their goals.
- Given the myriad challenges and changes in the higher education environment, it is critical that the University’s planning process “skate to where the puck will be”; that is, not only consider what is currently happening in higher education but also what is possible in the future.
- Public universities have a special responsibility to be sources of innovation, the places for solutions that have high-level impact on the problems of society.
- Now is a time for boldness and creativity on UI’s part, not incremental change.
- “ $I = (E \times S)^{\text{magic}}$ ” A university’s impact is a function of its excellence multiplied by its scale taken to the power of magic, where “magic” equals collaboration, leadership, fearlessness, community support, academic freedom and similar characteristics. The process of building a shared vision adds to this magic.
- In the context of current needs, there is a special call for UI to be the catalyst for economic development in the State.

- The University is working to create a compact with the State, one that would provide UI regulatory relief and greater certainty in funding in return for more explicit accountability and performance.

President Killeen also shared a sample of graphs based on data about UI that highlighted some of its strengths, weaknesses, and position among peer institutions.

Following his presentation, the President introduced James Duderstadt, President Emeritus of the University of Michigan.

II. Some Contexts for UI's Strategic Planning

President Duderstadt described his work on the 2011 *Master Plan for Higher Education in the Midwest*, a monograph published by The Chicago Council on Global Affairs as part of its Global Midwest Initiative, a regional effort to promote interstate dialogue among government, business, and civic leaders about how best to respond to globalization. In his brief remarks, President Duderstadt offered his perspective on several critical elements of the national and regional context for UI's strategic planning, some positive lessons of his years leading the University of Michigan, and a few thoughts on UI's future.

The Nation

- 40 to 60 percent of economic growth in the United States is attributable to research and development, and approximately 30 percent is the result of worker productivity. Both are areas in which universities play key roles.
- Increasingly the U.S. takes the R&D capacity of its universities for granted, federal policy no longer placing priority on university research.
- Similarly, business and industry are largely turning away from basic research. They are increasingly relying on universities for basic research but not providing the funding necessary to sustain an adequate level of research.
- While research universities are vital to the well-being of the nation, ever greater numbers of states are mounting attacks on their flagship institutions, decreasing funding and establishing additional mandates.
- Increases in state funding for higher education are not likely for another generation. In this context, States should grant greater autonomy to their research universities.

The Great Lakes Region

- State boundaries have become less important than regions with common economic and demographic characteristics anchored by world-class, global metropolitan centers.
- The only such center in the Midwest is Chicago.

- Moreover, in the Great Lakes region, there is a concentration of research universities producing the largest volume of research in the nation.
- The ability of these universities to put regional and national concerns ahead of their individual university and state interests will determine the vitality of the region as well as, to a large extent, the U.S.

The University of Michigan

- The University of Michigan is a story of university autonomy. The legislation that created the University provided statutory autonomy from regulation by the State of Michigan.
- Former President Harold Shapiro pushed responsibility and accountability at Michigan down the decanal level, increasing the culture of autonomy at the University.
- A significant factor in the University's autonomy has been its ability to generate levels of revenue that make up for its low level of state support. Michigan created, in effect, a central bank by pooling many of the institutional resources of its campuses into a common, centrally-managed endowment that saw a very high level of growth.

The University of Illinois

- Illinois has three AAU institutions: the University of Chicago, Northwestern, and UI.
- Looking at the ratio of public research universities to population nationally, there is roughly one research institution for every five million people. With 13 million in population, Illinois should have more than one public research university (UIUC).
- A challenge and an opportunity for UI is to make UIC into a top-tier, urban research university and the University into a heterogeneous and diverse system of institutions.

Following his presentation, President Duderstadt took a few questions from the retreat participants.

President Killeen then introduced Anthony Knerr and John Braunstein of AKA|Strategy, the consulting firm assisting UI in its strategic planning initiative. They provided a brief overview of strategic planning and the process in which the University is engaged and then offered directions for the next segment of the retreat, small-group breakout sessions.

Chair of the Board McMillan adjourned the formal Board meeting for the small group discussions.

III. Breakout Group Discussions

Participants in the retreat were separated into seven groups, which adjourned to small conference rooms for discussion of a set of questions that included the following.

1. What are the most singular assets or competitive advantages of the University of Illinois today, and why?
2. What are the three to five most important strategic initiatives/changes that the University should undertake over the next five years, and why? (These might be initiatives that build on existing strengths of the University or on significant potential that UI is very well positioned to develop.)
3. What are the most significant barriers to the University of Illinois realizing its potential over the next five to ten years, and why?
4. What are the most important needs of the State of Illinois that the University can address, and why are these particularly suited to UI's capabilities?
5. What are the most important roles for the University – as distinct from the campuses – to play over the next five years, and why? That is, what can the University do to raise the visibility, stature and impact of the campuses collectively and of public higher education in Illinois more broadly?
6. What would represent “success” for the strategic planning process, and why? What would be some good indicators – qualitative or quantitative; six months from now or five years out – that the planning effort had set the University on a successful path?
7. What actions/policies/initiatives would most help build successful interaction and collaboration among the three UI campuses?
8. What are three wonderful, but possibly impossible dreams for the University, and why are they wonderful but possibly impossible?

Following the small-group breakout session, the Board formally reconvened, and each group briefly reported its responses. Several common themes emerged, as follows:

Competitive advantages of the University's scale and scope

- Human capital: number, longevity, and breadth and depth of expertise.
- Alumni: 700,000 plus, spanning decades and geography. Extraordinary collective impact. A currently underutilized resource.
- UI presence in every Illinois county.

- World-class faculty.
- Breadth of academic offerings: Can prepare any student for anything at any point in his or her career or life. Limitless opportunities for intellectual exploration and growth.
- Breadth and depth of research: Can provide solutions for any problem or challenge, with potential impact from the local to the global level. Endless opportunities for interdisciplinary connections and networks.
- Diversity: representation from every aspect of humanity, the interaction of which offers boundless potential for individual and collective growth.

Strength in medicine and public health, welfare, and wellbeing

- A leader in innovation, application, and delivery across broad and diverse geography (rural, urban & everything in between).

Chicago: A greatly under-leveraged resource.

- Only world-class city in the Midwest.
- A transportation hub.
- A crucible for exploring and devising solutions to the problems of the urban environment.

The potential of the University of Illinois as a system

- Ambiguous relationship of the campuses to each other.
- Ambiguous role of the University with respect to the campuses.
- Enormous potential for enhanced collaboration/coordination among complementary institutions.
- Potential of relationships with other Illinois public institutions and community colleges.
- The need to define clear and mutually enhancing identities and branding for the University and the campuses.

A compact with the State

- A step towards regulatory relief, greater certainty/predictability, and enhanced institutional autonomy in return for higher level of accountability, efficiency, and return on investment.

Providing leadership for the transformation and betterment of the entire Illinois educational pipeline

- K-12; “Cradle through career.”

- Lifelong learning redefined – every citizen, everywhere, any time, in diverse forms.
- Becoming *the* national voice for public higher education, articulating its value in economic and moral terms.

“Attract, attract, attract” – becoming the resource of choice for all Illinois

- Increased student yield.
- Lifelong connection and engagement.
- An Illinois population that comes to UI for solutions.
- A State government that reaches to UI for policy guidance and research.
- “Top of mind” for all people of Illinois.

Establishing as a goal a set of global, societal grand challenges

- Challenges that UI collectively could address better than anyone.

In the discussion that followed, participants elaborated on some of these points and raised additional ideas, issues, and concerns. These included:

- Devising solutions to the many issues facing K-12 education will require UI to address many underlying societal issues that are also important to Illinois citizens. UI’s breadth and depth makes it especially well-suited to this challenge. However, the likelihood of success will be greatly increased by collaboration across campuses and disciplines.
- UI should clarify and focus its role with respect to healthcare, medicine, public health and associated fields. An important near-term challenge is how to make the UIUC and UIC medical schools complementary.
- If UI wishes to enhance its reputation and increase its visibility – that is, to be known as more than “Big. State. University” – it will need to give serious consideration to its identity, both as a system and as a set of campuses.
- Increased civic engagement underlies many of the themes from the breakout groups and includes both preparing students to change the world and tackling, as an institution, specific problems that UI believes it is well-suited to address.
- Collaboration is also another overarching theme – not just within the University but also with and among the communities that surround it.
- Several associated points were raised with respect to the question of the role of UI as a system:
 - Are three institutions enough to create a true system?

- Significant confusion exists about the roles and identities of UIUC and the University and must be addressed in defining UI.
- Research collaboration doesn't need incentives. Researchers are always looking for the best partners they can find, regardless of institution or location. A challenge for UI is to help researchers who are doing related work find each other across campuses and disciplines.
- What should be UI's relationship with the other state colleges and the community colleges in Illinois?

The retreat participants were asked what significant gaps they saw in the breakout group results, as well as what most surprised them. Their responses included:

Gaps

- Absent from the discussion is what the State of Illinois wants to be and what it perceives as its primary interests and needs. It is essential to understand the priorities of Illinois citizens, the Legislature, and the Governor, particularly if UI hopes to become a leader in responding to State needs. UI itself can be a catalyst for this discussion.
- Few explicitly student-focused initiatives came out of the breakout groups, despite broad acknowledgement of the need for the University to be responsive to students of all types. UI should ask:
 - How it should define for current and prospective students the benefits of being part of a system as opposed to a single campus; and
 - How the academic and co-curricular resources of the entire University – across all campuses and sites – can be made available to all students for their benefit.
- Fundraising and the role of the UI Foundation were not raised. This may reflect a lack of awareness of the Foundation's role and its potential going forward.
- The role of and goals for athletics at UI – an important although often highly-charged topic – require more consideration.

Pleasant Surprises

- It is no longer taboo to talk about being a “system.”
- A goal of greatly increasing the number of African-American students at UI seems to have broad acceptance.

The breakout groups were also asked to write two or three six-word stories that depict what UI will look like five years hence, when it really hits its stride and is doing fabulously well. (Instructions for this exercise and the resulting stories are attached as Appendix A)

Closing

After thanking the assembled group for its participation, President Killeen made the following comments with respect to the retreat and the University's strategic planning effort;

- The retreat is a significant dialogue among diverse stakeholders from across UI's campuses. It is critical that we maintain and expand this broad dialogue.
- The many different constituencies within UI should each think about the University's future and then accept the challenge to re-convene *us* – bringing together the Board, University Administration, and leaders of the campuses – so that we can listen to you.
- The sense of UI's potential is palpable. There are clearly so many areas in which UI can lead the State of Illinois.

President Killen then asked Board Chair Ed McMillan for his closing thoughts. The Chair noted several important considerations for the strategic planning effort:

- It is central to the University's future that all of its students challenge UI's leaders to listen to their input.
- The Board, the President, the Chancellors and many others must promote continued dialogue. As leaders, it is our responsibility to "listen, listen, listen."
- It is the job of all of us to make sure that the University is and will remain greater than the sum of its parts.

Six-Word Stories

Introduction and Instructions

Earnest Hemingway is said to have written the most famous 6-word story:

For sale: baby shoes. Never worn.

These six words tell a story succinct and powerfully. In this case, it's a sad one, but Google "six-word stories," and you'll find every genre and style represented. Some more examples:

"Eureka!" he said. Then he vanished.

What's for dinner, Mom? ...Where's Rover?

"Joining the President is his husband..."

Paramedics finished her text, "...love you."

Nothing to declare. Much to remember.

"Wrong number," says a familiar voice.

You never let me finish my

Some pretty good ones come out of higher education, too. Here's one from a workshop for university development officers:

Wanted: fundraising chairman. Ours won't ask.

And this is from a group we asked to write 6-word stories that capture the vibrancy of the University of Illinois five years from now, when it's become the terrifically exciting, successful, and dynamic place you want it to be:

"What's a chalkboard?" the freshman asked.

Now, your turn. Write two or three 6-word stories that show us what UI will look like five years from now, when it really hits its stride and is doing fabulously well. The only caveats:

- Make it a **story**, like the examples above. **Not** a list of characteristics and not a motto or slogan.

- Everything is on the table. Be astoundingly funny, beautifully heartbreaking, or staggeringly inspirational.

Results

A sample of the six-word stories produced in the July 2015 Board of Trustees Strategic Planning Retreat:

Help! I can't do this alone

Rocking the Midwest. Ignoring the barriers

Graduated...but don't know from what

Illinois, we are one family, occasionally

3 vs. 1; it's a barrier

Better healthcare, more people, lower costs

I don't remember what Alzheimer's is

The U of I: a Picasso

New Illinois Governor, Lisa Murray Madigan

U of I, redistribution of opportunity

UIC vs. UIUC in NCAA finals

U of I, free at last, free at last

U of I system: bye bye

Vibrant Illinois, U of I claims credit

Chicago Tribune Touts U of I

Midwest's jewel educate discover global transformation

Change the world student by student

The answer is how to begin

Great universities bathe in royal jelly

This place is alive with the future

All I want to be, an Illini

Creating healthier communities, University of Illinois

Globally acclaimed, nationally preeminent, locally relevant

We came, we LED, we conquered

What's a student, asked the professor?

Remember before XXXXXXXX was cured?

Take responsibility, nurture, carry out

9/11 never again, America strong

Why worry about the state legislature?

Follow Illinois, the President said.

Leaders needed – graduates and politicians irrelevant