

AN ACTION AGENDA FOR 2010: THE TACTICAL PLAN

The strategic planning document for Michigan Technological University—*THE MICHIGAN TECH PLAN: An Action Agenda for 2010*—consists of 7 strategic goals and 27 strategic objectives supporting the strategic goals.

Following concurrent priority analyses conducted by the president's executive officers and the Strategic Planning Working Group, the strategic objectives were grouped into three categories of order of accomplishment or urgency of implementation: Initiate/complete in 2004; initiate during the two-year period 2005-2006; initiate during 2007 or later.

Those strategic objectives that were determined to be the ones that we should pursue, or begin to pursue, during 2004 included the following. Those in bold-face type were strategies that both prioritization groups recommended for first implementation.

- **Increase the University's financial resource base**
- **Develop a pervasive marketing plan that emphasizes quality**
- **Increase the percentage and number of graduate students who are supported externally**
- **Repackage programs to keep current with the trends in science and technologies**
- **Pursue aggressive targeted marketing for programs with potential and need**
- **Offer programs in new and emerging areas, particularly interdisciplinary areas**
- **Increase the number of faculty actively engaged in research and graduate education**
- Optimize the financial structure to provide for adequate checks, balances, and most importantly, to best support the education and development of students
- Increase the number of interdisciplinary efforts in a few, well-focused platforms that will lead to world-class recognition
- Aggressively support and implement strategies to increase the diversity of our student body
- Manage and optimize enrollments within disciplines, schools and colleges for the benefit of all of our stakeholders
- Provide active, discovery-based learning experience that include the integration of research and co-op-internship experience
- Provide an outstanding work environment and support for all members of the Michigan Tech community

In evaluating the 13 strategic objectives recommended as having the highest priority or that should be addressed first, some of the objectives showed themselves to be interrelated if they were detached from specific strategic goals. From the 7 objectives ranked by both evaluating groups and the additional 6 objectives selected separately by one or the other group, the following five composite strategic objectives, listed in alphabetical order, were recommended to comprise an action or tactical plan.

There are three important components of any objective that is included in an action or tactical plan: the objective must be stated as an **action** to be accomplished (i.e., stated in action terms), the objective must be **measurable**, and someone must be specifically **responsible for the action** being taken or accomplished. The specific actions or tasks identified in order to accomplish each objective are listed immediately following the statement of each objective and the person who is responsible for accomplishing the task (i.e., the office or officer of primary responsibility or *OPR*) is identified with the statement of the task. The measurement that will indicate either the completion of the task or the progress being made toward achieving the task is identified in the last section of this Tactical Plan.

- **Education and Research:** Attract and retain outstanding faculty who will make outstanding contributions in undergraduate and graduate learning as well as research, increase the number of externally funded graduate students and increase the number of faculty members engaged in research/scholarship and graduate education, provide discovery-based learning experiences that include integration of research and co-op/internship experiences, create new undergraduate and graduate degree programs that are appropriate for MTU, and continue to encourage and improve interdisciplinary relationships in teaching and research.
- **Enrollment:** Optimize/manage enrollments across disciplines, repackage degree programs to reflect current science and technology, create new degree programs appropriate with our institution's mission, balance graduate and undergraduate enrollments, and improve faculty, staff, and student diversity.
- **Marketing:** Develop a comprehensive university marketing plan and pursue aggressive targeted marketing.
- **Operations:** Provide an outstanding work, study, and learning environment and support services for all employees and students by improving operational methods, simplifying processes, and removing bureaucratic barriers.
- **Resources:** Increase financial resources and optimize the universities financial structure.

Although the other strategic objectives were assigned a later implementation order, that does not mean that they are less important to the strategic plan. It only means that some objectives need to be initiated or implemented sooner while others can wait to be integrated into the overall plan.

THE 2004 TACTICAL PLAN

The Education and Research Objective

MTU must attract and retain outstanding faculty who will make important and significant contributions in undergraduate and graduate learning as well as research. We must increase the number of faculty members engaged in research/scholarship and graduate education and increase the number of externally funded graduate students. We must provide discovery-based learning experiences that include integration of research and co-op/internship experiences, create new undergraduate and graduate degree programs that broaden the degree opportunities for our students and which are appropriate for MTU. We must continue to encourage, broaden, and improve interdisciplinary relationships in teaching and research.

- Recruit, mentor, and retain new faculty committed to education, sponsored research, and scholarly and creative activities:
 - Retain MTU's high quality faculty through a variety of means from salary to professional development to public recognition. **[OPR: Deans]**
 - Reward individual and unit performance in scholarship, research, and education. **[OPR: Deans]**
 - Recognize and support undergraduate teaching, including general education instruction, and curriculum development efforts. **[OPR: Deans]**
- Develop, implement, and financially support new undergraduate and graduate degree programs that are appropriate for MTU:
 - Encourage development of appropriate new degree programs and ensure that financial support, if needed, is acquired. **[OPR: Provost]**
 - Improve communication between academic units and Undergraduate Admissions to understand and respond to emerging undergraduate degree interests. **[OPR: Deans]**
 - Improve communication between academic units and Graduate Admissions to understand and respond to emerging graduate degree interests. **[OPR: Deans and Chairs]**

- Increase the number of faculty members actively engaged in sponsored research/scholarly/creative activities:
 - Devise a plan to be implemented in 2005 that presents ways to increase the number of faculty involved in sponsored research. **[OPR: VP for Research]**
 - Seek out new areas of sponsored research and seize opportunities when they occur. **[OPR: VP for Research]**
- Increase the interdisciplinarity of efforts in teaching and research (find a “niche”):
 - Create new research institutes and centers to provide opportunities for teams of research faculty members and graduate students to work together. **[OPR: VP for Research]**
 - Re-evaluate how research incentive funding (indirect cost returns) are distributed to institutes and centers. **[OPR: VP for Research]**
 - Ensure that interdisciplinary work is properly recognized and rewarded. **[OPR: Deans]**
- Increase the percentage and number of undergraduate and graduate students who are supported externally:
 - Reward faculty members who attract and support graduate students with externally derived sources of support, particularly those supported from sponsored research being conducted by multidisciplinary/interdisciplinary research groups. **[OPR: Graduate Dean]**
 - Provide competitive compensation and benefit packages to attract and retain quality graduate students. **[OPR: Graduate Dean]**
- Increase the number and quality of students by:
 - Develop a plan for an undergraduate honors program to be implemented in 2005. **[OPR: Provost]**
 - Seek continuation of the Graduate Student Vision Initiative to recruit ever stronger graduate students MTU’s research needs. **[OPR: Graduate Dean]**

The Enrollment Objective

The Enrollment objective addresses actions that will optimize and/or manage enrollments across disciplines, repackage degree programs to reflect current science and technology, create new degree programs appropriate with our institution's mission, balance graduate and undergraduate enrollments, and improve faculty, staff, and student diversity.

- Use merit-based financial aid decisions to meet enrollment needs. ***[OPR: Vice Provost/Dean of Students]***
- Use financial aid to target National Merit Scholars to increase the number of Scholars attending MTU. ***[OPR: President]***
- Implement a differential tuition structure that will attract top students to MTU. ***[OPR: President]***
- Complete unit-by-unit capacity analyses for both graduate and undergraduate programs to focus institutional efforts into areas of recruiting opportunity. ***[OPR: Provost]***
- Continue to emphasize programs and policies to improve 1st to 2nd year student retention and involve the whole university community in student academic success. ***[OPR: Vice Provost/Dean of Students]***
- Continue to emphasize programs to improve student advising. ***[OPR: Provost]***
- Establish and coordinate efforts to recruit underrepresented students. ***[OPR: Vice Provost/Dean of Students]***

The Marketing Objective

It is important to develop a comprehensive university marketing plan and pursue aggressive targeted marketing to achieve MTU's enrollment targets, diversify the image of MTU, market our brand, improve and enhance MTU's recognition outside the region, adjust the political perception of a technological university, and promote a university of national choice. It is imperative to execute an effective marketing strategy now without delay.

- Write and implement a short-term marketing plan by October 1 based on our current knowledge from market surveys and using inputs from academic units, the Dean's Council, University Relations, and alumni constituent groups. ***[OPR: Vice Provost/Dean of Students]***

- Convene a small marketing advisory board by December 1 to evaluate and offer recommendations to MTU's marketing plan. This board should consist of internal and external stakeholders with some experience or expertise in marketing. **[OPR: Vice Provost/Dean of Students]**
- Develop a written long-term strategic marketing plan, with input from advisory boards, faculty, staff, students, and other stakeholders, that addresses those items identified by market analyses and stakeholders by March 1, 2005. **[OPR: Vice Provost/Dean of Students]**
- Obtaining regular input from advisory boards, faculty, staff, students, and other stakeholders is imperative, but must not delay execution of the plan. **[OPR: Vice Provost/Dean of Students]**
- Form an integrated marketing TEAM (Together Everyone Advances Michigan Tech) with the objective of having every MTU stakeholder—faculty, staff, students, alumni, friends—actively marketing the university. The TEAM approach should be started immediately and be fully operational by October 1, 2004. **[OPR: Vice Provost/Dean of Students]**

The Operations Objective

Provide an outstanding work, study, and learning environment and support services for all employees and students by improving operational methods, simplifying processes, and removing barriers to better service and more efficient operations. We should seek to support our faculty, staff, students, parents, alumni, friends, and visitors in ways that are “user-friendly” and allow us to work together collegially and as a team.

- Establish a cross-university team of faculty, staff, students, and others who can identify administrative barriers, impediments, or problems and propose solutions or changes that will improve each situation. Team to be assembled and operational by October 1. **[OPR: Vice Provost/Dean of Student Affairs]**
- Evaluate and redesign systems, processes, practices, procedures, or policies to make them more efficient, customer-oriented, or otherwise easier to use. **[OPR: President]**
- Devise and implement processes to optimize communication between students, faculty, staff, and administration. **[OPR: President]**

The Resources Objective

The past few years have shown the vulnerability of public institutions of higher education, in particular, to the vagaries of the economy and the response of the state legislature toward

funding priorities. Therefore, we must increase financial resources, find new and/or different sources of revenue, and optimize the university's financial structure.

- Recruit and involve industry and business leaders, especially MTU alumni and friends, to be advocates for increased state appropriations for degree programs relevant to the economic vitality of Michigan. **[OPR: President]**
- Better educate Michigan state legislative and executive leaders about the high cost degree programs and funding needs of technological universities compared to conventional non-research and non-technological institutions of higher education. **[OPR: President]**
- Identify sources of new or alternate revenue, prioritize the pursuit of those resources, and devise a plan for immediate implementation to acquire those revenues. **[OPR: President]**
- Develop a budget model that combines positive feedback, internal quantitative productivity measures, quality measures, and benchmarking in order to allocate resources based on unit contributions to the strategic plan. **[OPR: President]**
- Continue to build endowment for student scholarships, endowed faculty chairs and professorships, and university operations to \$400 million by 2010. **[OPR: President]**
- Increase the number of endowed faculty chairs. **[OPR: Deans]**
- Recruit and retain diverse/underrepresented faculty and staff members. **[OPR: Deans]**
- Continue the activities started in 2003 to improve child day-care facilities for our faculty, staff, and students. **[OPR: President]**

MEASUREMENTS OF PROGRESS

The Education and Research Objective

- Recruit, mentor, and retain new faculty committed to education, sponsored research, and scholarly and creative activities:
 - Retain MTU's high quality faculty through a variety of means from salary to professional development to public recognition. *[OPR: Deans]*

Measurement: *Compare percent of T/TT faculty retained on workforce at start of each AY (less those retired/deceased/terminated).*
 - Reward individual and unit performance in scholarship, research, and education. *[OPR: (1) SPWG; (2) Deans]*

Measurement: *(1) Develop and perform a survey to determine how/what to reward in Fall 2004; (2) initiate award program.*
 - Recognize and support undergraduate teaching, including general education instruction, and curriculum development efforts. *[OPR: Deans]*

Measurement: *(1) Plan developed by deans; (2) recognition/support provided; (3) report made to Deans by Department Chairs; (4) Deans submit report to Provost.*

- Develop, implement, and financially support new undergraduate and graduate degree programs that are appropriate for MTU:
 - Encourage development of appropriate new degree programs and ensure that financial support, if needed, is acquired. *[OPR: Provost]*

Measurement: *(1) Number of new degree programs; (2) number of majors.*
 - Improve and increase regular communication between Undergraduate Admissions and academic units to understand and respond to emerging undergraduate degree interests. *[OPR: Vice Provost/Dean of Students]*

Measurement: *(1) Annual report from Admissions to academic units citing new degree program interest; (2) annual report from academic units to Admissions identifying potential new degree programs/concentrations to assess potential interest.*

- Improve communication between academic units and Graduate Admissions to understand and respond to emerging graduate degree interests. *[OPR: Graduate Dean]*

Measurement: *Annual report from Graduate School to academic units citing new degree program interests in potential students.*

- Increase the number of faculty members actively engaged in sponsored research/scholarly/creative activities:

- Devise a plan to be implemented in 2005 that presents ways to increase the number of faculty involved in sponsored research. *[OPR: VP for Research]*

Measurement: *(1) Plan is produced by end of 2004, including methods of measurement, to include co-PIs (an opportunity to devise a plan to allocate percent of award expenditure); (2) Board of Control annual report.*

- Seek out new areas of sponsored research and seize opportunities when they occur. *[OPR: VP for Research]*

Measurement: *(1) Devise method of identification and evaluation of importance or achievability, etc.; (2) evaluate with respect to Action Plan 2010; (3) produce a plan to pursue or acquire new research funding.*

- Increase the interdisciplinarity of efforts in teaching and research (find a “niche”):
 - Create new research institutes and centers to provide opportunities for teams of research faculty members and graduate students to work together. *[OPR: VP for Research]*

Measurement: *Compare numbers of centers and institutes at start of each new academic year.*

- Re-evaluate how research incentive funding (indirect cost returns) are distributed to institutes and centers. *[OPR: VP for Research]*

Measurement: *Recommendations by VP for Research by end of 2004.*

- Ensure that interdisciplinary work is properly recognized and rewarded. *[OPR: Deans]*

Measurement: *(1) Method of allocating project expenditures; (2) credit for being a co-PI; (3) written plan.*

- Increase the number of undergraduate and the number and percentage of graduate students who are supported externally. *[OPR: VP for Research]*

Measurement: *Compare numbers of externally supported graduate students at the start of each semester.*

- Provide competitive compensation and benefit packages to attract and retain quality graduate students. *[OPR: Graduate Dean]*

Measurement: *Rank standing among peer group.*

- Reward faculty members who attract and support students (graduate, undergraduate) with externally derived sources of support, particularly those supported from sponsored research being conducted by multidisciplinary/interdisciplinary research groups. *[OPR: Graduate Dean and VP for Research]*

Measurement: *(1) Develop a plan that includes current and new rewards; (2) make the reward; (3) count the number of faculty who receive rewards.*

- Increase the number and quality of students by:

- Develop a plan for an undergraduate honors program to be implemented in 2005. *[OPR: Provost]*

Measurement: *(1) Plan developed and adopted by end of CY2004; (2) compare to previous years the number of students graduating in the top 10% of their high school class and 25/75 percentile and mean ACT scores.*

- Seek continuation of the Graduate Student Vision Initiative to recruit ever stronger graduate students MTU's research needs. *[OPR: Graduate Dean]*

Measurement: *(1) Submit budget request for continuation of \$200,000 funding in FY05; (2) compare mean GRE scores from current AY to scores from previous years.*

The Enrollment Objective

The Enrollment objective addresses actions that will optimize and/or manage enrollments across disciplines, repackage degree programs to reflect current science and technology, create new degree programs appropriate with our institution's mission, balance graduate and undergraduate enrollments, and improve faculty, staff, and student diversity.

- Continue to enhance the quality of MTU's undergraduate student body. *[OPR: Vice Provost/Dean of Students]*

Measurement: *(1) Number of merit-based awards accepted; (2) compare to previous years the number of students graduating in the top 10% of their high school class and 25/75 percentile and mean ACT scores.*

- Use merit-based financial aid decisions to meet specific degree program **and target** enrollment needs. *[OPR: Vice Provost/Dean of Students]*

Measurement: *Compare students enrolled each AY via directed financial aid offers to enrollment goals established for the specific degree programs.*

- Use financial aid to target National Merit Scholars to increase the number of Scholars attending MTU. *[OPR: Vice Provost/Dean of Students]*

Measurement: *Compare number of National Merit Scholars in the current year to previous year totals.*

- Approve a differential tuition structure that will attract top students to MTU. *[OPR: President]*

Measurement: *Differential tuition plan is accepted and approved by the President.*

- Complete unit-by-unit capacity analyses for both graduate and undergraduate programs to identify areas of recruiting opportunity. *[OPR: Provost]*

Measurement: *Revised capacity analyses for each academic unit completed.*

- Continue to improve 1st to 2nd year student retention and involve the whole university community in student academic success. *[OPR: Vice Provost/Dean of Students]*

Measurement: *Compare each Fall semester 1st to 2nd year student retention rate.*

- Continue to emphasize programs to improve student advising. *[OPR: Provost]*

Measurement: *(1) Develop and implement a plan; (2) compare the number of students seeking or receiving waivers to general education or curriculum requirements.*

- Establish and coordinate efforts to recruit underrepresented students. *[OPR: Vice Provost/Dean of Students]*

Measurement: *Implement short-term and long-term diversity and underrepresented student recruiting goals resulting from the diversity workshops.*

The Marketing Objective

It is important to develop a comprehensive university marketing plan and pursue aggressive targeted marketing to achieve MTU's enrollment targets, diversify the image of MTU, market our brand, improve and enhance MTU's recognition outside the region, adjust the political perception of a technological university, and promote a university of national choice. It is imperative to execute an effective marketing strategy now without delay.

- Write and implement a short-term marketing plan by October 1 based on our current knowledge from market surveys and using inputs from academic units, the Dean's Council, University Relations, and alumni constituent groups. **[OPR: Vice Provost/Dean of Students]**

Measurement: Publication of the plan by October 1, 2004.

- Convene a marketing advisory board by December 1 to evaluate and offer recommendations to MTU's marketing plan. This board should consist of internal and external stakeholders with some experience or expertise in marketing. **[OPR: Vice Provost/Dean of Students]**

Measurement: (1) Convene the advisory board by December 1, 2004; (2) recommendations offered by the board submitted to the President and the SPWG by a date specified by the advisory board but before the end of CY2004.

- Develop a written long-term strategic marketing plan, with input from advisory boards, faculty, staff, students, and other stakeholders, that addresses those items identified by market analyses and stakeholders by March 1, 2005. **[OPR: Vice Provost/Dean of Students]**

Measurement: (1) Publish the plan; (2) implement the plan by March 1, 2005; (3) report to the President and to the SPWG by the end of FY2005 on how the plan is being implemented.

- Obtaining regular input from advisory boards, faculty, staff, students, and other stakeholders is imperative, but must not delay execution of the plan. **[OPR: Vice Provost/Dean of Students]**

Measurement: Report to the President and to the SPWG by the end of CY2004 on what advice was obtained and its source.

- Form an integrated marketing TEAM (Together Everyone Advances Michigan Tech) with the objective of having every MTU stakeholder—faculty, staff, students, alumni, friends—actively marketing the university. The TEAM approach should be started immediately and be fully operational by October 1, 2004. **[OPR: Vice Provost/Dean of Students]**

Measurement: Team is formed and operational by October 1, 2004.

The Operations Objective

Provide an outstanding work, study, and learning environment and support services for all employees and students by improving operational methods, simplifying processes, and removing barriers to better service and more efficient operations. We should seek to support our faculty, staff, students, parents, alumni, friends, and visitors in ways that are “user-friendly” and allow us to work together collegially and as a team.

- Establish a cross-university team of faculty, staff, students, and others who can identify administrative barriers, impediments, or problems and propose solutions or changes that will improve each situation. **[OPR: Vice Provost/Dean of Student Affairs]**

Measurement: Report to the President and the SPWG by end of CY2004 of each problem, etc., identified and the proposed solution and its year of completion.

- Evaluate and redesign systems, processes, practices, procedures, or policies to make them more efficient, customer-oriented, or otherwise easier to use. **[OPR: President]**

Measurement: Report to the President and the SPWG by end of CY2004 of each problem, etc., identified and the proposed solution and its year of completion.

- Devise the plan to optimize multi-directional communication and information flow between students, faculty, staff, and administration. **[OPR: President]**

Measurement: (1) Submit the plan to the SPWG; (2) implement the plan before the end of CY2004.

The Resources Objective

The past few years have shown the vulnerability of public institutions of higher education, in particular, to the vagaries of the economy and the response of the state legislature toward funding priorities. Therefore, we must increase financial resources, find new and/or different sources of revenue, and optimize the university’s financial structure.

- Recruit and involve industry and business leaders, especially MTU alumni and friends, to be advocates for increased state appropriations for degree programs relevant to the economic vitality of Michigan. **[OPR: President]**

Measurement: (1) Devise a plan; (2) identify and form the team to implement the plan; (3) implement the plan before the end of CY2004.

- Better educate Michigan state legislative and executive leaders about the high cost degree programs and funding needs of technological universities compared to conventional non-research and non-technological institutions of higher education. **[OPR: President]**

Measurement: (1) Devise a plan; (2) identify and form the team to implement the plan; (3) implement the plan before the end of CY2004.

- Identify sources of new or alternate revenue, prioritize the pursuit of those resources, and devise a plan for immediate implementation to acquire those revenues. **[OPR: President]**

Measurement: (1) Identify potential sources; (2) prioritize the sources; (3) devise a plan to access the sources identified; (4) implement the plan before the end of CY2004.

- Develop and evaluate a budget model that combines positive feedback, internal quantitative productivity measures, quality measures, and benchmarking and which aligns with the strategic plan. **[OPR: President]**

Measurement: (1) Develop and present a budget model; (2) evaluate the proposed budget model.

- Focus on fund raising for the Mini Campaigns and Vision Initiatives according to University-provided priorities. **[OPR: President]**

Measurement: (1) Priorities provided by President; (2) total funds raised for the mini campaigns (total provided by Tech Fund); (3) total funds raised for the vision initiatives projects (total provided by Tech Fund).

- Recruit and retain diverse/underrepresented faculty and staff members. **[OPR: Deans]**

Measurement: (1) Compare the diverse/underrepresented numbers of faculty to previous years; (2) compare the diverse/underrepresented numbers of staff to previous years.

- Continue the activities started in 2003 to improve child day-care facilities for our faculty, staff, and students. **[OPR: President]**

Measurement: Report submitted by the President to SPWG and others as might be determined by the President.