

UST's Strategic Planning Newsletter



Issue Two: October 4th, 2002

UST is Actively Involved in Stage One of Kaludis Consulting's Five Phases of Strategic Planning (SP)

UST is currently involved in the first phase of this year's SP revitalization process, **Process Design**. Interviews with over 100 constituents, (faculty, staff, students, alumni, directors and others) are taking place. This helps UST and Kaludis consultants gain an understanding of UST's culture and the strategic issues we face. Additionally this year's SP revitalization activities invite the inclusion of all of our relevant groups/ stakeholders and

the inclusion of relevant strategic issues from a broad audience. Kaludis will also seek to transfer knowledge and best SP practices to our planning process and to our community.

During this phase, according to Kaludis lead consultant Dr. John Stevens, there is an assessment of the institution's history of planning and readiness for planning enhancement. Kaludis will recommend a planning process which will account for UST's



strengths and weaknesses. During Phase 1, Kaludis will advise SPIRE on the preparation of a strategic planning fact book containing environmental scanning information and comparisons of institutional data with that from other institutions.

Continued on page 3

Other Information to Check Out

Page

SP Phase 2, Preparation of Responses to Strategic Issues 2

SP Phase 3, Strategic Agenda Preparation 2

SP Phase 4, Operational Planning 2

SP Phase 5, Implementation 3

More SP Information 4



The President's Message to the UST Community

The strategic planning process has one primary purpose: to help the University community more effectively fulfill its mission. We have a half-century tradition of providing excellent educa-

tion to more than 13,000 alumni, and a clear sense of direction rooted in our Catholic identity.

...Still, today, fresh challenges and new opportunities confront us. The external environment--to

which we must be more attentive than ever—presents many of them to us. This is a time to look outward.

...If we are to flourish as an exceptional institution

Continued on Page 3



Father J. Michael Miller, CSB

UST's Strategic Planning Newsletter, *Issue Two: October 4th, 2002*

Phase Two: Preparation of Responses to Strategic Issues

According to Kaludis Consulting, in Phase 2, the campus community becomes involved through a broadly participatory process that explores responses to the strategic questions raised in the Process Design Phase. Phase 2 usually includes extensive work on the part of a strategic planning Steering Committee and Task Forces, which we facilitate. The Steering Committee and Task Forces

hold numerous open campus meetings and report to the President on the strategic planning process.

UST's membership in our SP Steering Committee will be announced later in this semester.

Task Forces will be identified through the Phase 1 work, culminating in the Stakeholders Conference on November 22 & 23.

More details about the Stakeholders Conference will be the lead story in the November *Strategic Planning Newsletter!*



Phase 3, Strategic Agenda Preparation

"We must recognize that our efforts to anticipate the future help to shape it."

John Sawhill



During Phase 3, Kaludis Consulting assists UST in preparing a document describing the institu-

tional strategic vision. The vision statement will be vetted to receive the endorsement of the President, the campus community, and other stakeholders.

The agenda becomes the central reference document for the initiatives the institution will pursue over a five-year period.

Phase 4, Operational Planning

During Phase 4 Kaludis will help UST design a process that "operationalizes" its strategic agenda. They will assist us in the preparation of our operational plan.

This document is usually pre-

pared by one or more work groups and includes the specific programs, budgets, time-lines and responsible parties necessary to implement each strategic initiative and a measurement system for determining if the strategic plan has been successfully implemented.



UST's Strategic Planning Newsletter, Issue Two: October 4th, 2002

Phase 5, Implementation

When our SP process has been revitalized and made more actionable through Phases 1 through 4, we will be ready to advanced UST through SP implementation. The comprehensive SP process will be implemented, with broad-based reassessment and revitalization activities, such as those in which UST is engaging in 2002-2003, re-occurring at regular intervals.

UST is Actively Involved in SP Phase One

The SP fact book will be completed by the end of Phase One, which will take place this Fall 2002. Kaludis will also facilitate a Stakeholders Conference on November 22 and 23, which will include faculty, staff, students, alumni, directors, representatives of the local community, businesses, other university partners, feeder schools and employers of UST graduates. The Stakeholders Conference will organize UST's strategic issues and will frame the questions the planning process will answer. Additionally the Stakeholders Conference will help UST clarify the particular process we will follow.



The President's Message to the UST Community

Continued from Page 1

we cannot focus inward. Rather, we must look to the needs and expectations of those whom we wish to serve—our students, employers, alumni and community leaders.

To be successful the process must engage everyone who loves the University: in the first place, faculty and students, but also staff, members of the Board, leaders and benefactors, and the growing number of stakeholders who look to UST to provide quality education in Houston.

Together we must plan for the future which takes into account, among other things:

- the changing demographics in Texas
- the expanding the level of college participation
- the increasing influence of technology on learning and curriculum

- the rising costs of higher education
- the increased competition from other institutions, including the new for-profit ones
- the public's demand for accountability
- the ever-changing expectations of students
- the shifts in the marketplace
- the altering patterns of philanthropy

UST, as we know, has many unique characteristics. It will be up to us to position them so that we can focus on what our community can do—and do superbly.

Many choices will be placed before us. Together we shall recognize these choices and choose one set of responses instead of another. Priorities will be identified. And hard decisions will be made. At every step of the way it will be

“If we are to flourish as an exceptional institution we cannot focus inward.”

our plan.

Above all, the participation of faculty—the soul of the Academy—in the process allows disagreements to be engaged constructively and supports communication and coordination. Our strategic planning process will enable a broad consensus to be built about our path to the future.

In the months ahead let us together seize the opportunity to determine the future of the University of St. Thomas. As stewards of a great legacy, we can decide deliberately and prudently how best to accomplish our mission in the first decades of the 21st century.

UST's Strategic Planning Newsletter, *Issue Two: October 4th, 2002*

Questions:

Contact Dr. Colleen Hester

Vice President, Strategic Planning, Institutional Research and Evaluation

SP Campus Coordinator

Phone: (713) 525-3180

E-mail: hester@stthom.edu

or

You may e-mail your strategic issues to Dr. John Stevens at either stevenj@stthom.edu or to jstevens@kaludisconsulting.com. Your identity will not be attached to the listings of issues, which will be made available to all for review!



More Strategic Planning Information

Successful Strategic Planning Processes in Education

- Are Pragmatic
- Fit Institution's Culture
- Reflect Institution's Values
- Involve as Many Constituencies as Possible
- Focus on Communication Systems

•Use Work Groups to Answer Strategic Questions:

- Big Institutional Question Tied to the External World
- Careful Selection of Participants
- Careful Selection of Participants

- Strengthen Governance Structure
- Create Shared Vision to Do the Right Things
- Develop Operational Plans to Do Things Right



- Implement Plans and Repeat Process