

MIAMI UNIVERSITY
BOARD OF TRUSTEES
Minutes of the Board of Trustees Retreat
Oxford Campus, Marcum Conference Center, Rooms 180/6
Wednesday, June 26, 2019

The Secretary to the Board of Trustees confirms that as specified in the Regulations of the Board of Trustees of Miami University, and in compliance with Section 121.22 of the Ohio Revised Code, due notice was given prior to holding this meeting of the Board of Trustees.

The retreat was called to order at 2:00 p.m. on Wednesday, June 26, 2019, in the Marcum Conference Center, on the Oxford Campus with the Board Chair, Mr. David Budig presiding. The roll was called with a majority of Trustees present, constituting a quorum. In addition to the Board members; President Greg Crawford, Provost Phyllis Callahan, Senior Vice Presidents David Creamer, and Tom Herbert; and Vice Presidents Jayne Brownell, Ron Scott, and David Seidl were also present; as were; Robin Parker, General Counsel; and Ted Pickerill, Secretary to the Board of Trustees. Additional members of the President's Cabinet were also in attendance, including; Jason Osborne, incoming Provost; Cliff Peale, Executive Communications; David Saylor, Intercollegiate Athletics; Randi Thomas, Institutional Relations; and Dawn Tsirelis, Assistant to the President. Also attending were the Deans; Cathy Bishop-Clark, College of Liberal Arts and Applied Science; Jerome Conley, University Librarian; Michael Dantley, College of Education Health and Society; Marek Dollár, the College of Engineering and Computing; Chris Makaroff, the College of Arts and Science; Kimberley Moore, Dean of Students; John Weigand for Liz Mullenix, College of Creative Arts; and Marc Rubin, Farmer School of Business. Also present was Dr. Julia Guichard, co-Chair of the Strategic Planning Steering Committee to present; along with members of the public present to observe or assist.

Present: C. Michael Armstrong (National Trustee) David H. Budig Megan Cremeans (Student Trustee) Robert E. Coletti (National Trustee) Sandra D. Collins Thomas W. Gunlock Zachary Haines Terry Hershey (National Trustee)	Will Kulis (Student Trustee) John C. Pascoe Diane Perlmutter (National Trustee) Mark E. Ridenour (arrived at 3:40 p.m.) Rodrick Robinson Mary Schell Robert W. Shroder
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Absent: John W. Altman (National Trustee)

Public Session

Note: There were no resolutions or ordinances considered.

Report of the Strategic Planning Steering Group

Chair Budig welcomed everyone to the 2019 Board of Trustees Retreat. President Crawford then introduced Dr. Julia Guichard and the Strategic Steering Committee report. He stated that the goals of the Miami 2020 plan had been achieved, ahead of schedule. Miami 2020 had guided Miami University through economically challenging times, and ensured full use of every available dollar. Going forward, with the uncertainty in higher education, new, adaptable and flexible strategic planning is now essential.

He stated the strategic planning report, to be presented by Dr. Guichard, was created through active engagement with the entire University community, the input of the steering committee members, the members of the subcommittees, and the many Miami community members who contributed their thoughts to the process. The plan is ambitious and will help guide Miami University towards the future, acknowledging the rapidly changing environment of higher education; it is a flexible plan, and one designed for iterative review, assessment and realignment. He stated that the next Provost, Dr. Jason Osborne, will take the plan and will work with the Deans and the campus on implementation.

Dr. Guichard began by relaying fellow co-Chair Dr. Bob Applebaum's regrets at being unable to attend. She then thanked the members of the Strategic Planning Steering Committee, the subcommittees, and the many members of the Miami Community who contributed, calling it a true team effort.

Dr. Guichard then presented an overview of the report to the Board, and addressed questions. She explained that the report did not include metrics, because it was more broadly oriented to address overarching goals, with specific measures to be developed, as needed, in conjunction with implementation.

She stated that higher education is changing rapidly, and we do not know what universities will look like in five years, so the plan must be continuously reviewed and reevaluated.

Aspects of the plan included a recommendation to reorganize the academic structure, establish an Honors College and to create additional revenue streams. She was asked what was left out, and replied that all major recommendations were included.

Dean Cathy Bishop Clark outlined the recent Regional Campus strategic review. Trustee Armstrong outlined the process and background of the high-demand AIMS program, emphasizing the role played by curriculum. Tom Herbert provided a discussion on how the upcoming campaign interrelates with plan, with scholarships being a top priority. And Jerome Conley discussed Town-Gown relations.

President Crawford then outlined next steps, discussing ongoing efforts in parallel – such as strategic planning concurrent with the consideration of new buildings. He stated that incoming Provost Osborne will be engaging the Miami community to implement the plan, and the Board can expect an update from Dr. Osborne at the September meeting, with greater detail in December.

With the in depth discussion completed, Chair Budig thanked Dr. Guichard.

The Report of the Strategic Planning Steering Committee is include as Attachment A, and Dr. Guichard's presentation as Attachment B.

Adjournment of Meeting

Chair Budig thanked the Board, the Deans, and the members of the President's Executive Cabinet, for attending and for their input. He thanked the members of the public who attended to learn and observe, and stated he looks forward to the implementation of the plan.

Following a motion by Trustee Ridenour, a second by Trustee Pascoe, and a unanimous voice vote of the Board, with all in favor and none opposed, the Board adjourned at 4:45 p.m.



T. O. Pickerill II
Secretary to the Board of Trustees



Miami University's Strategic Plan

June 26-28, 2019

Presented to the Board of Trustees

From the Strategic Planning Steering Committee

Miami University

Miami University
Honoring Our Past and Present, Creating Our Future
The Strategic Plan

We are inspired by the Myaamia phrase *aanceelintaakani* – meaning
“an instrument used to change how one thinks.”

The Strategic Planning Steering Committee:

Bob Applebaum	Julia Guichard
Renee Baernstein	Denise Taliaferro Baszile
Stacey Lowery Bretz	Moira Casey
Diane Delisio	David Ellis
William Even	Elise Radina
Vaishali Raval	Aaron Shrimplin
Sherrill Sellers	John Weigand

Table of Contents

Acknowledgements	Page 4
Our Statement of Purpose	Page 4
Executive Summary	Page 5
The Strategic Plan	Page 9
<ul style="list-style-type: none"> ● Part One – Honoring Miami’s past and present <ul style="list-style-type: none"> ○ A new landscape for higher education ○ Miami’s major strengths and challenges ● Part Two – Planning Miami’s future <ul style="list-style-type: none"> ○ The charge from President Crawford ○ The planning process ○ Questions to frame our inquiry ● Part Three – Strategic recommendations <ul style="list-style-type: none"> ○ Innovate ○ Invest ○ Invigorate ○ Implement 	Page 9 Page 12 Page 13
A Final Note: A Commitment to Implementation	Page 44
Listing of Subcommittee Members	Page 44

Acknowledgements

Developing a strategic plan for a university is an important and complex job. Accomplishing this task in an eight-month time period only happens when a dedicated team of hard-working individuals join forces. To start, we recognize the incredible work of the 12 steering committee members and the 74 subcommittee members. Their work provided the foundation of ideas; this plan rests on their shoulders. All of them had full-time jobs before signing up to serve the university in this planning process. We also acknowledge more than 600 faculty, staff, students and community members who attended our open listening sessions and provided comments via our website. The spirit of Miamians to make our university even better truly inspired us throughout the process. We thank our colleagues at the Myaamia Center for providing our plan name and Ted Pickerill for his ongoing administrative support. Cliff Peale provided his invaluable wordsmithing skills over the course of this plan development. Finally, we thank Provost Callahan and President Crawford for supporting us at each step of the planning journey. We are proud to have had the opportunity to serve the university in this capacity.

Bob Applebaum and Julia Guichard, Steering Committee co-chairs

Our Statement of Purpose

The Miami University strategic plan imagines a transformed university. We will position Miami to honor our legacy of distinguished teaching and learning as we create experiences relevant to today's students and confront the challenges facing all of higher education. Headwinds of demographics, financial realities and erosion of popular support have made our strategic imperative clear: Standing still is not an option. Now is the time for Miami to transform for a new era, building an adaptive, responsive and financially sustainable foundation, with students immersed in academic and co-curricular experiences that prepare them to succeed in today's interconnected world. We will welcome students, faculty and staff of all backgrounds to a united Miami community, always learning and committed to a culture of investment and continuous improvement.

Executive Summary

Honoring Miami's Past and Present

The world for an entering Miami University first-year student is different from any previous generation. Yet today's first-year student walks onto campus with the same hopes and dreams as students have done throughout our history. Excitement about learning, career expectations, contributions to community and the possibilities of tomorrow abound. Miami University's challenge is to support the aspirations of students and to prepare them for lifelong learning, even as the world around them continues to change. This strategic plan will position Miami to ensure that our students of today and tomorrow will continue to have the chance to pursue their dreams, opportunities Miami has helped students fulfill for more than two centuries.

Planning Miami's Future

In October 2018, President Greg Crawford appointed a 14-person steering committee to lead Miami's strategic planning efforts. The president identified six areas of focus: academic excellence; research and scholarly success; transformative student experience; diversity, equity and inclusion; financial sustainability; and Miami as a national university. The committee's work was based on the principle that success will depend on broad input from the entire Miami community.

The committee's charge from President Crawford: "We are asking the committee to develop a five-year strategic plan that builds on the many strengths of Miami University, but recognizes the need for change and innovation. Our charge to the committee is to take a hard look at our current approaches and to recommend transformational change. We believe that incremental changes to our current strategy and tactics – as valuable as they have been – will not prepare Miami for the new world of higher education. ..."

Strategic Recommendations

As we present our recommendations, it is important to recognize the context of our work. Higher education is changing so quickly that Miami already has launched several strategic initiatives to address some of the issues raised in this strategic plan. A new development campaign, a feasibility assessment for new buildings, regional campus reform including a major shift to offering both two-year and four-year degrees in the traditional classroom setting and online and even changes to our budget model all are in process. The world is moving too fast to

explore one strategy at a time, so coordination and communication have never been more important across the Miami community.

We know that Miami University is living in a new era of financial accountability. As you will read throughout this report, Miami cannot afford every program or service we might wish to provide. Every decision we make must be fully informed by the financial implications. It is imperative that we manage our resources wisely, develop diversified revenue streams to reduce dependence on tuition and align every resource with the university's broader strategic initiatives. In today's world of higher education, this is the job of every Miami division, department and administrative unit.

We observe a common theme across the various recommendations in this report. Our current decision-making processes are too often decentralized and disconnected, and it will be important moving forward to rethink our strategic planning as a process that can make these connections in real time. As we seek to create a transformational experience for students, we must strengthen the connections between academic and co-curricular decision-making. A standing Strategic Planning Committee can help to make these connections while also providing strategic direction for the university.

In this context, we offer the following recommendations categorized into four groups that include cross-cutting strategies. We will **innovate** to position Miami to thrive in a rapidly changing environment. We will **invest** in proactive solutions. We will **invigorate** our process and culture to clear pathways for creative solutions. And we will act decisively to **implement** the reforms envisioned in this plan. Table 1 includes a summary of recommendations for implementation. We recognize that Miami cannot act upon all of the recommendations at once, so this plan is a living document that will require constant adaptation as higher education continues to evolve.

Innovate	Invest	Invigorate	Implement
#1-Establish Honors College	#8-Improve infrastructure to support research & scholarship	#16-Reorganize academic structure	#24-Establish ongoing Strategic Planning Committee
#2-Enhance cross-unit curricular collaborations	#9-Improve faculty culture for involvement in externally funded research	#17-Transform the Global Miami Plan	#25-Establish Diversity, Equity and Inclusion Committee
#3-Cultivate cross-disciplinary research	#10-Improve approach to how faculty resources are allocated to align with strategic initiatives	#18-Redesign curricular process	#26-Coordinate facilities planning with strategic plan
#4-Position Miami as a teaching & learning national resource	#11-Enhance student retention strategies	#19-Complete curriculum review: undergraduate	#27-Improve allocation of resources to align w/strategic plan priorities
#5-Develop a curricular “innovation lab” for experimentation	#12-Substantially increase endowment to support scholarships	#20-Complete curriculum review: graduate	#28-Develop strategic enrollment management plan
#6-Renew partnership between academics & residence life	#13-Provide necessary resources to Miami students studying abroad or away	#21-Develop master plan for e-learning	#29-Clearly define and market Miami strengths
#7 Redesign our student academic advising system	#14-Enhance the relationship between Miami and the city of Oxford	#22-Create plan for revenue-generating graduate degrees & certificates	#30-Enhance external visibility of research
	#15-Review recommendations from existing Sustainability Committee and align with plan	#23-Revise program review goals and process to align with strategic plan	

A Commitment to Implementation

Change is difficult for both human beings and organizations. It requires more than agreement on priorities and action steps. Our community must commit to meaningful and lasting change. Throughout the planning process, we often heard about barriers created by a Miami culture that was resistant to change. Frequently, our first administrative reaction goes to why an idea cannot be implemented, rather than asking why it is important, and if so, how we can make it happen. We began our planning process by emphasizing Miami's position of strength. In fact, as we complete this document, we have seen news about our large and accomplished incoming Class of 2023. This success is a good thing, which will allow us to continue to invest in our future. But that should not conceal our long-term reality: Miami must adapt to future challenges faced by higher education across the nation. We believe this strategic plan is a step in that direction.

Miami University

Honoring Our Past and Present, Creating Our Future

The Strategic Plan

Part One – Honoring Miami’s Past and Present

Fifty years ago, a first-year student moving into a dorm room on the Oxford campus had a clock radio to plug in, and maybe one or two other items. Today’s student brings 20-30 plug-in products, from the Amazon Echo to Z-Wave network security. Neither students nor faculty had imagined personal computers in 1969, and the well-crafted letter was state-of-the-art communication. Clearly the world has changed. Some popular majors of today – strategic communications, interactive media studies and international studies, to name just a few – did not exist. To support students in 1969, Miami received more than half of its operating budget from the state. Today, state support is less than 10%. Higher education faces other challenges as well: fewer high-school graduates, higher operating costs and eroding popular support. Employers are looking for workers with transferrable skills that cross traditional academic boundaries, including data, automation, communication and ethics. The magnitude of societal change and its impact on higher education cannot be overstated.

Yet despite these dramatic changes, today’s first-year student walks onto campus with the same hopes and dreams as the student 50 years ago. Excitement about learning, career expectations, contributions to community and the possibilities of tomorrow abound. Miami University’s challenge is to support the aspirations of students and to prepare them for lifelong learning, even as the world around them continues to change. This strategic plan will position Miami to ensure that our students of today and tomorrow will continue to have the chance to pursue their dreams, opportunities Miami has helped students fulfill for more than two centuries.

Our plan builds on Miami’s areas of strength:

- **Academic excellence** in undergraduate education, including a well-rounded liberal arts education, faculty mentoring and undergraduate research opportunities.
- **A high-achieving and motivated student body** that continues to excel in and out of the classroom.

- **A defined market position** as a university that values both teaching and research, nurturing Miami's long tradition of the teacher-scholar model.
- **An established reputation for producing leaders** in industry, government, sports and the non-profit sector.
- **Strong residential life** and co-curricular programs designed to integrate the academic, social and service components of the college experience.
- **Accessibility for a diverse population of learners** at one of Miami's two regional campuses or through online degrees.
- **National and international reputation**, resulting in the largest proportion of undergraduate out-of-state students of any Ohio public university.
- **Supportive, engaged alumni** and employer communities committed to providing internship and employment opportunities to our graduates.
- **A strong return on tuition investment** recognized by national publications.
- **Extensive career services** from the first year to graduation and beyond.
- **Effective stewardship** with a strong financial foundation to launch new initiatives.
- **Nationally recognized and broadly accessible study abroad and study away** programs, including a campus in Luxembourg.
- **Community partnerships**, including our regional campuses that work closely with their local communities.

These strengths have served Miami well, and continue to do so. Yet we also face significant challenges, some decades old but many a product of recent changes faced by higher education.

- **Demographic projections** indicating that there are fewer traditional college-age students on the horizon, particularly in Ohio and the region. In addition, growth in our older population will result in increased public resources allocated to health and retirement.
- **Greater competition** for high-achieving students that results in many universities now marketing themselves as doing what Miami does. Miami has fallen behind in strategic investments in programs and academic infrastructure that have distinguished us in the higher education landscape.

- **Reduced public support for higher education**, making tuition our major source of revenue today. This has resulted in substantial cost increases for students and their families and increased efficiency expectations for all of higher education.
- **Questions about the value of higher education** that have reduced Miami's ability to sustain the traditional economic model. Students, families and policymakers are increasingly measuring higher education based on return on tuition investment.
- **A disruptive environment of online education** and other delivery models, which are often less expensive and more convenient for some students.
- **The growing cost of higher education** that mandates larger and larger scholarships to attract the best students, resulting in substantial budgetary pressure.
- **An existing business model** that needs to be modified as costs are projected to increase faster than revenue under the current structure.
- **A focus on careers** that has driven some students to shift away from traditional liberal arts majors, forcing universities to continually adapt curriculum in response to societal changes.
- **The need to balance** an educational experience that prepares students for their first job and their future jobs.
- **Working across disciplines** has become more important as students are increasingly trying to navigate between career opportunities and their choice of an academic major. Miami's curriculum, organizational structure and financial model have stressed departmental and divisional success, and working across disciplines at the departmental or divisional levels has been a secondary goal.
- **External funding for research support** that has become more competitive. Miami has stressed the integration between teaching and research but has not developed a strong research infrastructure compared to other national universities.
- **Substantial leadership turnover** that often brings new initiatives with limited commitment from faculty and staff and mixed success. To move the university forward, faculty and staff must be on board.

Part Two – Planning Miami’s Future

In October 2018, President Greg Crawford appointed a 14-person steering committee to lead Miami’s strategic planning efforts. The president identified six areas of focus: academic excellence; research and scholarly success; transformative student experience; diversity, equity and inclusion; financial sustainability; and Miami as a national university. Each of the six subcommittees was chaired by two steering committee members; the subcommittees included 62 faculty and staff, 10 students and two community representatives. Subcommittees held more than 100 meetings from January through March 2019. During this same period, the steering committee co-chairs hosted more than 30 listening sessions attended by more than 600 people. The steering committee also responded to ongoing comments on the strategic planning website. During April and May 2019, the steering committee developed the final recommendations. This final report and recommendations were reviewed by subcommittee members prior to submission. The committee’s work is based on the principle that success will depend on broad input from the entire Miami community.

The committee’s charge from President Crawford: “We are asking the committee to develop a five-year strategic plan that builds on the many strengths of Miami University, but recognizes the need for change and innovation. Our charge to the committee is to take a hard look at our current approaches and to recommend transformational change. We believe that incremental changes to our current strategy and tactics – as valuable as they have been – will not prepare Miami for the new world of higher education. ... This plan will advance our vision to be one of the nation’s best student-centered liberal arts universities focused on undergraduate education with select premier graduate programs, promote diversity and inclusion and ensure financial sustainability. To achieve this goal, the plan must foster synergistic collaborations among disciplines, departments, divisions and campuses, and with external partners.”

The work of the Strategic Planning Committee was framed by Miami’s mission as a student-centered public university with an unwavering commitment to liberal arts undergraduate education and the active engagement of its students in both curricular and co-curricular life. Miami is deeply committed to student success and empowers its students to become engaged citizens who use their knowledge and skills with integrity and compassion to improve the future of our global society.

As the committee developed the strategic plan, a series of questions guided our recommendations. We recognize that in today’s dynamic world, strategic plans will provide a road map, but they must always be living and ever-changing documents. These questions provided our anchor for the strategic plan.

Our guiding questions

- Will our strategy differentiate Miami?
- Does the strategy tap into our advantages?
- Is our strategy targeted to the right population(s)?
- Does our strategy put us ahead of trends?
- Is our strategy empirically based?
- Does our strategy recognize uncertainty?
- Does our strategy balance commitment and flexibility?
- Does our strategy help ensure financial viability?
- Can we act on the strategic plan?

Part Three – Strategic Recommendations

As we present our recommendations, it is important to recognize the context of our work. Higher education is changing so quickly that Miami already has launched several strategic initiatives that address some of the issues raised in this strategic plan. For example, the university has embarked on “Boldly Creative,” a \$50 million academic development fund to bring forward and fund proposals for interdisciplinary academic programming. Proposals have been solicited and a first round of projects selected. A new development campaign, a feasibility assessment for new buildings, regional campus reform including a major shift to offering both two-year and four-year degrees in the traditional classroom setting and online, and even changes to our budget model all are in process. The world is moving too fast to explore one strategy at a time, so coordination and communication have never been more important across the Miami community.

As part of this planning process, we also observed a common theme that our current decision-making processes are too often decentralized and disconnected. As we move forward, it will be important to use our strategic planning process as a tool to coordinate these connections. We know that Miami University is living in a new era of financial accountability. As you will read throughout this report, Miami cannot afford every program or service we might wish to provide. Every decision we make must be fully informed by the financial implications, with a detailed plan for future revenue increases or cost efficiencies. It is imperative that we manage our resources wisely, develop diversified revenue streams to reduce dependence on tuition and align every resource with the university’s broader strategic initiatives. In today’s world of higher education, this is the job of every Miami division, department and administrative unit.

At the same time that we face new and ever-changing challenges, we also have a talented and energetic student body, loyal and accomplished alumni who are generous with time and spirit, and a dedicated faculty and staff. In our more than 30 listening sessions with faculty, staff and students, the commitment to Miami and to making good even better was clear and consistent. Miami has a long history of faculty and staff governance and a University Senate that is actively involved in university policy. We believe that a strong University Senate is critical to successful plan implementation and recommend that many of the plan implementation committees include Senate representation. There are a few instances in the plan where we propose that a standing Senate committee might not be the best mechanism for addressing a specific reform, and we have discussed that in the plan. Finally, we also believe that it is imperative to incorporate into our planning process ongoing mechanisms to hear the voices of our students (past, present and future), faculty, staff and the communities we serve.

Many of the recommendations included in this report are primarily focused on the Oxford campus. However, we believe we are One Miami – encompassing Oxford, the regional campuses and Luxembourg. For a strong Miami University, strategic planning must be aligned to capitalize on the diversity of strengths across all divisions and campuses.

In this context, we offer the following recommendations categorized into four groups of cross-cutting strategies. We will **innovate** to position Miami to thrive in a rapidly changing environment. We will **invest** in proactive solutions. We will **invigorate** our process and culture to clear pathways for creative solutions. And we will act decisively to **implement** the reforms envisioned in this plan. Table 1 includes a summary of recommendations for implementation. We recognize that Miami cannot act upon all of the recommendations at one time; we also include a suggested timeline for implementation. We know the plan will be a living document that will require constant adaptation as higher education continues to evolve.

Table 1. Miami's Strategic Plan Recommendations by Category

Innovate	Invest	Invigorate	Implement
#1-Establish Honors College	#8-Improve infrastructure to support research & scholarship	#16-Reorganize academic structure	#24-Establish ongoing Strategic Planning Committee
#2-Enhance cross-unit curricular collaborations	#9-Improve faculty culture for involvement in externally funded research	#17-Transform the Global Miami Plan	#25-Establish Diversity, Equity and Inclusion Committee
#3-Cultivate cross-disciplinary research	#10- Improve approach to how faculty resources are allocated to align with strategic initiatives	#18-Redesign curricular process	#26-Coordinate facilities planning with strategic plan
#4-Position Miami as a teaching & learning national resource	#11-Enhance student retention strategies	#19-Complete curriculum review: undergraduate	#27-Improve allocation of resources to align w/strategic plan priorities
#5-Develop a curricular "innovation lab" for experimentation	#12-Substantially increase endowment to support scholarships	#20-Complete curriculum review: graduate	#28-Develop strategic enrollment management plan
#6-Renew partnership between academics & residence life	#13-Provide necessary resources to Miami students studying abroad or away	#21-Develop master plan for e-learning	#29-Clearly define and market Miami strengths
#7 Redesign our student academic advising system	#14-Enhance the relationship between Miami and the city of Oxford	#22-Create plan for revenue generating graduate degrees & certificates	#30-Enhance external visibility of research
	#15-Review recommendations from existing Sustainability Committee and align with plan	#23-Revise program review goals and process to align with strategic plan	

Table 2. Timeline for Strategic Plan implementation	
Time Period 1 Recommendations (Years 1 & 2)	Time Period 2 Recommendations (Years 2 & 3)
Honors College #1	Position as teaching national resource #4
Cross-unit curricular collaborations #2	Redesign student academic advising #7
Cross-disciplinary research* #3	Provide resources for students studying abroad or away #13
Develop curricular sandbox #5	Enhance relations with city of Oxford #14
Renew partnership between Academics & Residence Life #6	Review recommendations from Sustainability Committee #15
Improve research infrastructure #8	Redesign curricular process #18
Improve research culture #9	Create plan for revenue-generating graduate degrees #22
Improve resource management to invest in growing programs #10	Revise program review #23
Enhance student retention strategies #11	Coordinate facility planning #26
Increase endowment for scholarships #12	Define and market Miami strengths #29
Reorganize academic structure* #16	Enhance research visibility #30
Transform Global Miami Plan #17	
Complete curriculum review- undergraduate #19	
Complete curriculum review-graduate #20	
Develop e-learning master plan #21	
Establish standing Strategic Planning Committee #24	
Establish Diversity, Equity, Inclusion Committee #25	
Align resources with plan #27	
Develop strategic enrollment plan #28	

- **We have highlighted two sets of recommendations that should be implemented simultaneously.**

We will innovate to position Miami to thrive in a rapidly changing environment.

Our initial group of recommendations focuses on innovation strategies. The problems of the world are not solved by single disciplines, but by multi-disciplinary teams. Today's workplace and the research and development approaches in both the public and private sectors recognize this evolution. Our students have recognized this complexity – consider their efforts to add majors, co-majors and minors. To address these opportunities, we offer the following recommendations:

Recommendation #1: We recommend that Miami enhance and revise the current University Honors program to become an exceptional and more selective Honors College on the Oxford campus. We propose an Honors College Planning Committee composed of divisional representatives, honors program leadership, a representative from Enrollment Management and Student Success, current honors students and residence life staff, appointed by the president to develop an implementation plan. We also propose that advising and support for National Fellowships be integrated with honors administration.

As a university with a reputation for excellence in undergraduate education, Miami has a long history of attracting undergraduate students who are high-ability learners. Successfully recruiting these students has a number of important benefits, including elevating Miami's national reputation, improving recruitment, increasing the intellectual climate and attracting strong faculty who enjoy being challenged by talented students.

The competition for high-ability students has become increasingly fierce. Many peer institutions already have their own honors colleges. Development of an Honors College should not be done on its own, separate from other needs. Miami's Honors College should create a strategy to attract a diverse group of high-ability students, other "honors/scholars" programs should be evaluated and coordinated, and advising for fellowships should be supported. We can build on our strength in honors programming to create an Honors College on the Oxford campus and associated programs that support selectivity, diversity and equity. This planning process should include ideas for developing an appropriate format for an honors experience on the regional campuses.

Recommendation #2: We recommend that Miami develop new strategies to enhance interdisciplinary and cross-unit collaborations. The strategies should facilitate cross-unit curriculum design, encourage joint appointments, create a structure for innovative programs and earmark some portion of faculty leaves for cross-unit activity.

One of the biggest challenges in any large university is organizational structure. We are organized by department and division, allowing experts to hire and review peers, common language for curriculum development and shared research interests. However, the structure also leaves Miami primarily organized in single-discipline departments, when the world is organized around collaborations and partnerships. The Strategic Planning Committee struggled with the question: How can we promote and encourage cross-unit collaborations?

- The universities and students of the future will be more integrative and interdisciplinary. Many of our students are already creating their own cross-cutting programs. Collaborations such as the recent new BA and BS degrees in public health provide examples of programs that are leveraging cross-unit strengths. A more flexible degree structure could include a major that is constituted of at least 50% core in a skill or competency, with the remainder of the major offering a related area or application of the skill. Additional applications (tracks/concentrations) could then be added without having to create a new degree, allowing for more nimble development to respond to changing demand. An example of this approach is the new BA in data analytics, a degree with advanced concentrations that can span all divisions as needs and interests evolve.
- Difficulties in creating and sustaining faculty joint appointments are a major obstacle to interdisciplinary research and teaching. Deans and the provost may be well-positioned to identify promising opportunities for joint appointments and should devote some portion of new hiring to those positions, including temporary joint appointments. For example, health economists (ECO) and biostatisticians (STA) would be natural candidates for joint appointments in a division that includes a health focus. In today's complex environment, the use of joint appointments is becoming a critical strategy to enhance interdisciplinary teaching and research. Miami's resistance to this model is a barrier to our efforts to advance in this area.
- Miami should create an umbrella instructional and research "discovery or innovation lab" to enable more rapid response to student demand and as a space for testing new ideas. Faculty could be assigned temporarily (three to five years) with a focus on a particular program or curriculum initiative. The Humanities Center provides a possible model for creation of the umbrella structure, an opportunity to refine proof-of-concept

with low risk and low expense at the beginning. Depending upon the outcomes of the “lab” phase, next steps for promising ideas might include expanding into a co-major or minor or moving into a department as a full major.

- Some research leaves should be redirected to faculty who commit to working on an innovative, interdisciplinary or cross-unit academic program or co-curricular academic structure based in a residence hall.

Recommendation #3: We recommend that Miami develop areas of specialization and interdisciplinary collaboration that capitalize on our diverse forms of research, cross disciplinary boundaries and promote collaboration. We propose that Miami complete a comprehensive review of centers and institutes, identify those that focus on research and scholarship and have these centers report to the Office for the Advancement of Research and Scholarship (OARS) – specifically the associate provost for research – to promote interdisciplinary collaboration.

A key step in strengthening Miami’s research profile is to develop specific areas of specialization that reflect the expertise of Miami faculty and involve undergraduate students. These areas can use existing centers and institutes, opportunities created by Boldly Creative initiatives and efforts that support interdisciplinary research.

We also suggest exploring other support opportunities including:

- Mechanisms to support groups of faculty organized around a central issue with the goal of producing a deliverable such as data acquisition or grant writing.
- Development of new PhD programs (based on the graduate program review in recommendation #20) that support niche areas of interdisciplinary research and have high potential for increasing external funding.
- Identification of societal challenges that could be addressed through multi-disciplinary collaboration.

Recommendation #4: We recommend that Miami University develop and implement a plan to become the premier destination for developing and disseminating innovations in teaching and learning that catalyze student success.

Miami's national reputation emphasizes excellence in undergraduate teaching and learning and a significant return on investment for the student. This recommendation leverages current strengths and envisions strategic investments to further improve student success while positioning Miami as the standard bearer for advancing and disseminating knowledge of effective pedagogy and student learning in the disciplines.

A hallmark of the Miami faculty is the teacher-scholar identity, and the scholarship of teaching and learning has long been an essential element of the faculty learning communities run by the Center for Teaching Excellence. Faculty who conduct research on the cognitive and social dimensions of teaching and learning span multiple departments. This research transcends the "scholarship of teaching and learning" and its focus on reflective practice to investigate how people learn the concepts, values, practices and ways of knowing within a discipline. Research on cognition and effective pedagogy could be strengthened by cross-cutting initiatives and partnerships with such existing initiatives as the Center for Teaching Excellence and Lilly Conference, the Miami Regionals Center for Teaching and Learning and the Howe Center for Writing Excellence.

Recommendation #5: We recommend Miami develop a mechanism for experimentation using a curricular innovation lab. The president should task the provost's office and the university registrar to develop a process to create experimental curriculum. We recognize that barriers do exist to such an approach, but we believe Miami can create a solution by making this an organizational priority.

A challenge to revising curriculum is the impact on academic programs. Innovation is difficult because changes can impact a student's ability to meet university requirements. Miami should explore the concept of the "sandbox," an experimental model that allows academic units to beta-test versions. Assuming assessment and approval processes are put in place to monitor these models, faculty would be encouraged to innovate and the best ideas could be adopted more broadly. The curriculum will be more nimble and a process for experimentation will help

ensure continuous innovation, improve faculty engagement in the process and ultimately strengthen the relevancy of the curriculum.

Recommendation #6: We recommend that Miami develop a strategy to reinvigorate the partnership between academics and the residential experience. We should review and enhance the student life experience with a focus on campus living, off-campus connections, the town-gown relationship and reimagining and updating the living-learning community structure on campus. We propose a student life, faculty and student advising committee appointed by the president to develop a plan for improvement.

Miami has long promoted a transformational student experience as a strength of the university. Many of our graduates reflect fondly on their experiences with faculty both inside and outside the classroom; opportunities to pursue their own interests through co-curricular activities, independent projects or off-campus study; and so many other experiences that made their time at Miami meaningful and memorable. Miami has always attracted engaged students in search of diverse, challenging experiences as well as faculty committed to teaching and to making a difference in the lives of their students.

The student experience remains a strength at Miami. However, competitor schools now match the student experiences we promote. A decentralized operational model has likely created silos between students' curricular and co-curricular experiences. Increasingly, faculty are not incentivized to engage with students outside the classroom in their promotion criteria or in the assignment of workload. Our students increasingly demand a more customized academic experience that combines the academic and co-curricular components of our educational model at a time when our efforts are becoming less integrated.

Miami Oxford's campus is "all-in" as a residential campus, and we need to ensure that the experience is value-added for our students. Miami created the living-learning communities (LLCs) and we were at the forefront in this area a decade ago. Can we lead the way again? We must shift the questions about our location as a liability and instead embrace Oxford as a college town and Miami as a campus where living and learning intersect to create a seamless and cohesive learning experience – 24/7, four-year, immersive and transformative.

The above-mentioned committee should propose strategies for better integrating curricular, co-curricular and career experiences, explore mechanisms for implementation and envision programs that would set Miami apart from its peers. We note that a current project is exploring this question, and the committee should build on this work.

This committee should also take steps to bring to fruition Miami's goal to be a leading health and wellness community. It should enhance and support all comprehensive, collaborative initiatives that bring together faculty, staff and students to address alcohol and drug misuse, sexual assault and interpersonal violence, and mental and physical health within the Miami/Oxford community.

The effort should leverage current co-curricular and academic partnerships and examine ways to highlight and acknowledge faculty and staff for engaging with students outside the classroom. Miami should strengthen the LLCs by better connecting them to the academic experience and to faculty through incentivizing faculty engagement. Tactics could include a stronger social network integration of the first-year and second-year experience, better connections between the living and learning experience for off-campus students and a co-curricular portfolio.

A strength of the Miami experience is that students already participate actively in student organizations (often in leadership positions), pursue off-campus study abroad and internship experiences, engage in undergraduate research and are involved in numerous activities that build on their curricular experience. A proposal to define in more detail how these attributes could be completed and tracked is currently underway.

Recommendation #7: We recommend that Miami redesign student advising to ensure that students are getting state-of-the-art academic advising that provides value, empowers success, ensures effective communication across units and leverages modern data analytics. The revision should clarify and clearly articulate the roles and coordination of residence life, professional advisors, chief departmental advisors and faculty advisors. We recommend the president appoint this committee to develop a revised student advising system that would distinguish Miami from peer and aspirational institutions. This committee should be composed of professional advisors, faculty, Student Life staff, students and a representative from Enrollment Management & Student Success.

Our current system of advising is too often disconnected. Gaps between curricular, co-curricular and career-preparation advising have been identified, and there was some concern that this has been heightened by the shift away from first-year advisors in the residence halls. A more integrated advising system could enhance students' sense of engagement in the college experience and thus improve retention. The current approach and effectiveness vary dramatically by division. Some divisions have a staff of advisors, while others rely on faculty as primary advisors and some have a combination. Faculty have varying levels of skill and experience in advising outside the academic realm.

The committee should:

- Evaluate the approach now being implemented.
- Develop metrics for assessing benefits and costs of a revised system.
- Examine implications of a professionalized system for the delivery of UNV101 content, summer orientation, the Center for Career Exploration & Success, the honors program and other advising entities that function independently in the current system.

Miami will invest in proactive solutions.

Through our review process, the Strategic Planning Committee identified a series of recommendations that require additional institutional investment. In each of these areas, we believe the investment will result in both quality and financial improvements for Miami. In some areas, such as support for Miami's research infrastructure, our institutional investment lags behind peer universities, and improvements are essential if plan goals are to be achieved. Miami has been praised for careful monitoring of expenditures. While we applaud such an approach, it systematically limits our investment in program development.

Recommendation #8: We recommend that Miami increase institutional investment to enhance research and scholarship, developing targeted initiatives to strengthen a culture of research, including research infrastructure. Working with the provost, the associate provost for research should develop a plan to increase institutional financial investment in research (e.g., increase staffing in OARS) to compete for more external funding. We should centralize research infrastructure for better coordination of activities related to external research.

Across divisions, we have faculty at the forefront of cutting-edge research in their fields, including those who engage in diverse forms of research and creative output, enhancing the possible avenues for interdisciplinary collaborations. Additionally, we have Miami undergraduate and graduate students who are talented and highly motivated to engage in research. Despite these strengths, there are roadblocks that make it challenging to engage in research at Miami. Our major area of weakness is limited resources devoted to research, including the lack of dedicated research space, the need for increased Office for the Advancement of Research and Scholarship staffing and the need for clearly articulated course buy-out provisions. Despite having faculty highly engaged in research, we lack an institutional culture of research that is ingrained across divisions and levels of faculty. Faculty members have expressed that substantially more institutional resources are devoted toward the teacher in the teacher-scholar model, incentivizing teaching over research. For example, faculty with external funding cannot take salary from externally funded grants during January term because they are considered under contract, but faculty can be compensated for extra teaching during that time period. Substantial teaching, advising and service responsibilities also make it challenging for research-active faculty to devote time to research and scholarship.

Our current infrastructure includes limited staffing for proposal submission and post-award support, limited PhD programs and lack of integration of research and funding-related activities. These limitations make it challenging to submit proposals for external funding and to administer successful grants.

Recommendation #9: We recommend that Miami improve its approach to incentivizing faculty engagement in externally funded research where relevant and ensure that departments and/or divisions enforce clear criteria for measuring research productivity in the allocation of workload.

Research and scholarship are vital to Miami's reputation and its ability to attract and retain high-quality faculty. Although we view external funding as important, we also recognize that departments without external funding are doing important research that is valuable to the university. Nevertheless, the university would benefit if more researchers would seek and receive external funding when it is available. To this end:

- Faculty engagement in externally funded research should be more clearly specified in promotion and tenure criteria.
- Faculty mentoring programs need to be more fully developed, and the overall research culture needs to be enhanced and supported.
- Faculty workload needs to be formally addressed. Many departments do not actually implement a differential workload policy that incentivizes external funding. To measure research productivity, the review process should occur on a regularly scheduled basis and departmental workload policies need to be better defined and implemented.

Recommendation #10: We recommend that Miami improve its approach to how faculty resources are allocated to optimize the alignment of resources with strategic initiatives.

One of the most difficult issues that any university faces is how to best use its personnel. The importance of tenure dates back to the dawn of university systems, guaranteeing a free academic voice deemed critical for a free society. Our committee reinforces the importance of the concept, yet recognizes the challenge of how to balance this important principle with the

need to respond to market changes and student demand. Using teaching and clinical faculty have been one strategy used to address this challenge. The approach attempts to preserve the principles of tenure while providing Miami with workforce flexibility. Given the changes in the economy and higher education, this tension is likely to increase. Miami should take steps to ensure that the dialogue and planning necessary to create the proper balance remain at the forefront of the planning process.

We recommend the improved approach include:

- Aligning academic hiring plans with strategic priorities in order to reallocate resources to targeted areas of expertise. Consider “cluster” hires across disciplines to foster interdisciplinary teaching and research.
- Enhancing faculty contributions through required, purposeful professional development. Provide opportunities for faculty to retool as changes occur in the curriculum and in disciplines.
- Training and empowering department chairs to make difficult decisions that impact the financial viability of their programs. Changing policies to create a more agile faculty workforce will require department chairs to act upon those policies.
- Providing instruments for data-informed decision making and training chairs to use them effectively.
- Identifying faculty through succession planning as potential department chairs, then training or mentoring them to ensure success.
- Developing multiple measures for evaluation of chairs to provide a more balanced assessment of performance.

Recommendation #11: We recommend that Miami increase and coordinate student retention efforts with technology and effective intervention strategies. We should leverage predictive analytics to direct and implement early targeted interventions based on best practices, creating a culture of data-informed intervention and support.

On the Oxford campus, each one percentage point increase in retention generates approximately \$500,000 in net tuition revenue (per cohort, per year, for a class of 3,900 students with 39% non-residents). Our first-to-second year retention rate in 2017 was 92% in

Oxford. On the Middletown campus, first-year retention rates remained steady at 68.6% for the 2017 cohort, while first-year retention rates in 2017 on the Hamilton campus were 72.4%. While we aspire to improve our first-year retention rates, we need to recognize that even maintaining current retention rates is a growing challenge.

Miami has invested significantly in acquiring industry-leading student success tools from Civitas and EAB. Miami has initiated efforts to identify and engage those students identified through these tools as most at risk of not persisting and graduating. Enhancing these tools and their application will engage students with the goal of improving student persistence and satisfaction, leading to increased academic success.

Recommendation #12: We recommend that Miami prioritize scholarships as the top goal of endowment growth in order to reduce dependence on undergraduate tuition, particularly scholarships that can be used to recruit the incoming class as the highest priority advancement initiative.

Scholarships provide a direct benefit to our students, reduce our discount rate and lessen the draw on the operating budget. As states continue to face resource demands from an array of areas such as health and long-term services, K-12 education and infrastructure support, small increases to the higher education budget seem the norm. The top universities in the nation have used student scholarships as a way to support the institution without shifting the burden of reductions in state tuition support directly to students and their families. Miami has development needs in a wide array of areas, but we believe it is critical at this juncture that the bulk of development activities be targeted to scholarships. To achieve success in this area, a substantial increase in the size of the endowment targeted toward scholarships will be necessary.

Recommendation #13: We recommend that Miami provide the necessary resources to ensure that our students have the opportunity to study abroad or study away during their years at the university. Miami should task Global Initiatives and Advancement with generating the necessary resources to support this recommendation.

Miami has become a national leader in providing students with the opportunity to study abroad or away. As we prepare students to participate in a global society, these experiences away from our region are critical in developing intercultural skills. However, these experiences are also expensive and too often beyond the reach of many students and their families already struggling to afford a college education. As we strive for diversity, Miami must ensure that all students, regardless of income, will be able to take advantage of this study option.

Recommendation #14: We recommend that Miami strengthen its relationship with the city of Oxford. Miami and Oxford should develop a plan that will ensure a fruitful partnership.

It is critical that Miami and the city of Oxford engage in a productive partnership. Miami and Oxford depend on each other to support students' residential experience. We see great potential for development and other activities that can showcase Oxford as a destination. To enhance the quality of life for all members of the Miami community – students, faculty, staff and area residents – we recommend a plan be developed to facilitate the identification, exchange and pursuit of mutually beneficial opportunities and activities to jointly enhance the Miami and Oxford communities.

There are many town-gown coordinating groups that currently exist, but they do not appear to be well-positioned or they lack the authority to address specific operational areas including business communication, off-campus living and promotional efforts. Goals and areas of enhancement should include: securing a vibrant local economy that meets the needs of students, year-round residents and visitors in a dynamic world, encouraging community members and Miami students in community service efforts to help those most in need, leveraging our recent Town-Gown Association award to promote a healthy community, and advancing sustainability. Together, these goals would create meaningful progress toward making Miami and Oxford the healthiest, most sustainable college community in the nation.

Recommendation #15: We recommend that Miami continue its efforts as a leader in environmental sustainability. We support the work of the existing Sustainability Committee and suggest that its report be reviewed by the newly created ongoing Strategic Planning Committee (See Recommendation #24.) to ensure alignment with the overall university strategic plan.

Previous initiatives, including the Strategic Priorities Task Force in 2010, identified strategies that have helped to position Miami as a leader in environmental sustainability. In addition to the moral imperative to prioritize these initiatives, there are real long-term benefits to the bottom line in identifying and adopting environmentally responsible strategies. Currently, the Sustainability Committee is tasked with presenting a sustainability report by June 2019.

**We will invigorate our process and culture
to clear pathways for creative solutions.**

The engaged student learner has been the foundation of our academic philosophy at Miami. But today, many universities have adopted a similar approach. We must clearly distinguish what a Miami education can offer today's students to differentiate their Miami experience and actively communicate this to our target audiences. We must run on parallel tracks, building on our strengths while responding to student demand as our academic programs evolve. To better serve our students, we will:

- Make a Miami education more flexible, more multi-disciplinary and cross-disciplinary, more problem-based and more integrative.
- Ensure that our academic offerings are responsive to the needs of today's students.
- Build upon and enhance our core strength in liberal arts education.
- Generate new and exciting opportunities for academic excellence.
- Enhance the development of select new programs in areas of growing student interest.
- Right-size the existing curriculum to generate resources and institutional will for innovative academic programs.

To accomplish our goals in this area, we propose the following recommendations.

Recommendation #16: We recommend that Miami reorganize its academic structure to incentivize interdisciplinary collaboration and create synergies between departments and divisions. We propose the president appoint a committee in the summer of 2019 to develop a reorganization plan, including design, process, cost and timeline for an improved structure to achieve strategic plan goals.

The basic divisional and departmental configuration of Miami has not changed much in the past 50 years – but the world around us has changed. The challenges that we now face suggest that structural changes are necessary to thrive in our third century.

Reorganizing divisions and departments comes with costs. In order for any reorganization to be worth it, the new structure must facilitate Miami's larger strategic goals, provide a distinct advantage compared to the current structure and be financially sustainable. Any new structure must focus our resources strategically, increasing our visibility while enabling us to be nimble and responsive to changing environments. Our biggest challenge involves creating an interdisciplinary environment that recognizes the need for both disciplinary depth and cross-discipline breadth.

Miami is developing new programs in health sciences and in data and information sciences. Creating an Honors College (*See Recommendation #1.*) will affect institutional structure as well. These examples illustrate the need to align our academic structures to respond to a changing landscape. Any new academic structure should meet the following criteria:

- **Process.** Any reorganization must prioritize large-scale change; our current policies are written for small-scale incremental change. The process must include all stakeholders.
- **Collaboration.** The new configuration should facilitate research and teaching among multiple disciplines and open new possibilities for students, faculty, outside partners and donors.
- **The right size.** Any new or newly structured divisions should rest on a viable financial base, be of sufficient size and complexity to constitute a full division, while remaining small enough to clearly focus on a coherent shared vision.
- **Leadership.** Recruiting, mentoring and accountability systems for chairs and deans should be strengthened to ensure visionary, constructive leadership.
- **Student success.** The new structure should clearly define student pathways to graduation.

- **Finances.** New structures should improve the financial position of the university, either through efficiencies, increased access to external funding or attracting new students.
- **Holistic.** There should be a realistic plan for divisions or departments that might be “left behind” when a unit is disbanding, ensuring all faculty can continue to thrive and contribute to Miami’s success.
- **Divisional curriculum.** Any restructuring should identify and address consequences that may result from shifts in divisional curricular requirements.
- **Innovation and entrepreneurship.** These are key elements that extend across all divisions. These values should permeate and anchor all programs, not be warehoused into a single unit that becomes another silo.
- **Faculty composition.** The faculty should align with individual program needs, adding more divisional flexibility and control. For example, the proportion of teaching or clinical faculty currently is limited by Senate rule.

Recommendation #17: We recommend transforming the Global Miami Plan to better prepare students for success. We propose that the provost create a committee with broad representation to engage in a comprehensive review of the Miami Plan and recommend revisions. (This process should be in addition to the ongoing work of the Liberal Education Council.)

While acknowledging the important contributions of the Global Miami Plan to the education of our students, the committee received consistent feedback that Miami’s general education core is no longer particularly innovative or included among national best practices. Many elite universities have a strong focus on their core that brands them. We have been known for our liberal arts education core, but our review finds that our approach no longer differentiates Miami. In a recent report by the American Council of Trustees and Alumni (ACTA), Miami’s liberal education program received a grade of “C.” More importantly, feedback from students suggests that the Miami Plan is not viewed as a distinguishing feature of their Miami education or a reason for attending Miami. We must transform the Miami Plan to be more innovative and impactful, with more distinguishing characteristics and fewer requirements to simply check boxes.

We suggest that the committee take the following steps:

- **Review best practices to ensure that we examine all options, and revisit reports from the previous review committee.** Although positive changes came from the recent Miami Plan revision (advanced writing, experiential learning, etc.), a more transformational revision is needed to meet the needs of a constantly changing world.
- **Simplify the plan.** The Miami Plan Foundation course list (27+ credit hours) may be too extensive and disconnected, and is often perceived by students as a continuation of the traditional distribution model. There are too many categories, too many approved courses in each category and possibly too many core competencies. A simplification of core requirements would give students more opportunities to customize their education, produce financial efficiencies and reduce time to degree as mandated by the state.
- **Remove the thematic sequence (TS) requirement. Consider other ways to encourage or require a secondary area of breadth or expertise beyond the major.** There is benefit in developing secondary expertise outside the major and providing students a credential that furthers their careers. However, a great many students now meet the TS requirement with a second degree or a minor, and many thematic sequences already are anchored in a single discipline (such as a minor).
- **Ensure students have an in-depth experience in at least one of the areas described below, where Miami already has demonstrated success.** Given our track record in the areas listed below, we suggest that our Miami Plan include an opportunity for students to develop a recognized track record in at least one of these areas. Demonstrated expertise could be achieved through a combination of core Miami Plan courses, experiential learning, independent studies, special programs and courses meeting major requirements. Miami should be known for producing students who have core training in at least one of these subject areas:

- Undergraduate research
- Leadership and teamwork
- Communication (writing, speaking)
- Entrepreneurial thinking
- Cultural competency in a diverse world

- **Prioritize cross-disciplinary and project-based learning.** Much emphasis has been placed on the value of cross-disciplinary, project-based “horizontal” learning that connects students across disciplines, and with collaborators outside the university, in solving complex “big idea” problems. Both the thematic and capstone requirement in

the current Miami Plan support this in concept, but neither really does a good job of incentivizing this type of learning experience outside the student's major, since many thematic sequences and capstones are within the major and often double-dip for major requirements. Such a requirement in the core also could connect Miami students to the university initiatives (research, leadership, entrepreneurial thinking, cultural competency and communication) discussed above.

Recommendation #18: We recommend redesigning the current process for curriculum review in order to make it more flexible, efficient and responsive. To address these challenges, we propose that Miami create a new standing committee charged with providing curricular vision and vetting all proposals for new programs and significant program revisions.

One of Miami's current challenges is the absence of a partnership between the academic departments that create curriculum and the administrative units such as Enrollment Management and Student Success that hear directly from students about interest and demand, and Career Services that connects to the needs of employers. In addition, the process for development, revision and deletion of programs and courses is cumbersome. Despite an extended process, rarely does the review end in program denial or major modifications.

To ensure input from all stakeholders, we recommend the standing committee include faculty, divisional leadership, Enrollment Management & Student Success, Office of Institutional Research, Finance & Business Services and University Communications & Marketing. It would review proposed new programs and significant program revisions with a focus on university-wide benefits, efficiencies, competitive advantage and potential markets. This review would be completed before development of a detailed proposal for new curriculum that would continue to require University Senate approval. This committee should replace the Council on Undergraduate Curriculum and also coordinate with the Boldly Creative proposal initiative for new programs. We further suggest that the process for minor changes to curriculum be streamlined and approved at lower levels of review.

Recommendation #19: We recommend a one-time comprehensive review of all undergraduate majors. We propose a committee appointed by the provost to oversee this review, with subcommittees organized by broad subject areas to include field expertise. We do not recommend a review of minors, co-majors or individual courses at this time, as they are covered by existing sun-setting provisions and such a review would be inordinately time-consuming.

In order to grow strategically, resources must be reallocated. While a rich and varied curriculum benefits students and helps draw a diverse student body to Miami, the committee believes that a reduction in the number of undergraduate majors is appropriate. Miami has 138 undergraduate majors (as counted in the list of bachelor's degree majors in the 2018-19 Bulletin). We do not have the luxury and financial capacity to be all things to all people.

This review must be transparent and implemented in consultation with key stakeholders including faculty, Enrollment Management & Student Success and community partners. Programs should be grouped by broad subject area and reviewed as a grouping. A triage approach is anticipated, where programs or areas that appear to be misaligned with the criteria below receive a more extensive or accelerated review.

The criteria for this review should include:

- Alignment with Miami University's core mission, including cultivating a culture of inclusive excellence.
- Demonstrated high quality, as measured by faculty research and scholarship, levels and types of high-impact practices and participation of external stakeholders.
- Contribution to undergraduate research experiences and opportunities.
- Contribution to external funding.
- Contribution to the greater community – including our Miami environment, local, state, national and international.
- Documented student demand that includes actual and projected enrollments. Destination majors and programs that attract high-achieving students to Miami are particularly important in the current competitive higher education landscape.
- Uniqueness at Miami. In cases of significant similarity, those programs will be reviewed together within a subject area, and consolidation considered.

- Clearly articulated and realized student outcomes. Are students successful in pursuing their next step beyond graduation, including additional training, the first job or a career opportunity?
- Actual budget impact. Simply stated, curriculum has costs. These costs should be articulated. Calculated per-student costs for each program should take into account actual faculty salaries, space, facilities, support staff, graduate assistantships (if they impact the undergraduate program), class sizes and curriculum sharing with other programs.

Recommendation #20: We recommend a one-time comprehensive review of graduate programs. We propose a separate committee be appointed by the provost to complete this review, evaluating existing graduate programs and considering reallocation of existing assistantships.

At the graduate level, Miami supports a large number of small master's programs and should prioritize a better mix of those supported by the university and those that generate revenue. The review should focus on the same criteria used for undergraduate programs (*See Recommendation #19.*), plus the following additional criteria:

- Does the existence of the program improve the undergraduate program? Do graduate students assist with undergraduate research? Do high-performing undergraduates enroll in some of the graduate courses? Does the existence of the graduate program enhance undergraduate student recruitment or undergraduate student opportunities in other ways?
- What is the effect of the graduate program on faculty research productivity, particularly through external funding or publications?
- What is the net cost of the program, taking into account external funding, graduate assistantships, contribution to teaching and opportunity costs for faculty?

Recommendation #21: We recommend that Miami create a master plan for e-learning that carefully articulates university policy, divisional responsibilities, target audiences and overall leadership – building on the leadership role taken by the College of Liberal Arts & Applied Science. This master planning process should evaluate the benefits and costs of a new administrative structure for Miami’s e-learning efforts.

E-learning curricular options should enhance the quality of existing programs and expand Miami’s reach and audience in strategically selected areas, particularly those critical to workforce development. Online-only education is a promising space for the development of professional certificates that in some areas can stack into a master’s degree. At the undergraduate level, programs for online or hybrid development should be carefully selected to complement, not compete with, the residential face-to-face experience. It is critical that Miami have a comprehensive online strategy, one that balances the growth in online course offerings, especially on the regional campuses, with the significant investment in the residential experience on the Oxford campus.

As part of the e-learning strategy, Miami should develop an array of lifelong learning opportunities for alumni and working professionals. Such efforts require an alternative organizational structure, resources for administration and marketing, infrastructure support and a recognition that such programs require an investment of university resources.

Recommendation #22: We recommend that Miami launch a systematic plan, led by the provost’s office in conjunction with divisions, to diversify revenue streams by developing additional educational experiences such as professional graduate degrees and certificates, specialized workshops and training opportunities. The plan should include expansion into additional areas that could tap into Miami’s extensive alumni network.

Because of Miami’s emphasis on undergraduate education, our location and our value placed on direct faculty involvement with students, Miami – particularly on the Oxford campus – has remained focused on our long-standing traditional student target population. Given some of our areas of expertise and the development of the online market, there could be select areas of the graduate and certificate market that would be a good resource investment, as would

educational activities that target our alumni. Activities could include professional graduate programs, certificates, continuing education and micro-credentials for workforce development. Miami could also explore exam prep services. However, such an investment requires both a university strategy and a shift in our approach. Miami currently serves undergraduate students in the traditional classroom model, and our existing processes mirror this focus. For any plan for additional graduate degrees and certificates to succeed, we must shift our mindset to resolve issues such as the application process, university calendar, fee structure, startup investment, marketing budget and faculty compensation.

Recommendation #23: We recommend that Miami revise program review goals and processes to align with the strategic plan. We propose that the current program review approach be suspended and that a new process be developed after the proposed reorganization and curricular reviews are completed.

Miami's program review process was originally developed as part of an effort to reduce the number of programs or majors. Over time, it was modified to become a process to help departments improve, with the most recent iteration focusing heavily on strategic planning. Although this shift has been useful, the goals of program review remain unclear. To the departments participating in program review, the process still feels like resource allocation is the primary goal, and the program review document is crafted accordingly. Consequently, the program review process and documents have been criticized for not being closely tied to departmental or divisional improvement actions. A revised program review should be a more holistic process in alignment with national best practices that also acknowledges requirements of the Higher Learning Commission (HLC).

Miami will act decisively to *implement* the reforms envisioned in this plan.

Expectations of strategic planning have changed. Given the dynamic nature of higher education, it is no longer viable to develop a formal 5-10 year strategic plan that can be followed in lock-step. Plans are now ideas that require continual updating and adjustment. The vision and goals remain critical, but tactics evolve much more rapidly in today's environment. To this end, it will be critical that the entire Miami community is committed to implementation of this plan. The recommendations in this section are designed to move Miami forward in its efforts to ensure plan success.

Recommendation #24: We recommend formation of an ongoing Strategic Planning Committee to monitor and coordinate plan actions and to update strategic efforts based on implementation experience and internal and external environmental developments. We propose that the president appoint a committee in the summer of 2019. We also suggest staggered three-year terms by members representing faculty and staff from across campuses to ensure a productive committee.

Some have argued that strategic planning as a concept should be replaced by strategic thinking, because a static five-year plan is no longer viable. Regardless of perspective, what is clear is that the plan is a living document that has to be monitored, coordinated, adapted and modified on an ongoing basis. We believe a standing Strategic Planning Committee that reports to the president and provost is critical. We propose that the ongoing Strategic Planning Committee include members who would also serve as co-chairs or members of key committees recommended throughout this plan. Coordination and communication between committees is essential to minimize disruption and maximize efforts through large-scale transformation.

We observe a common theme across the various recommendations in this report. Our current decision-making processes are too often decentralized and disconnected, and it will be important moving forward to rethink our strategic planning as a process that can make these connections in real time. For example, as curriculum and organizational structure are revised, this will have an immediate impact on facilities decisions. As we seek to create a transformational experience for students, it will be important to strengthen the connection between academic and co-curricular decision-making. A standing Strategic Planning Committee can help to make these connections while also providing strategic direction for the university.

Recommendation #25: We recommend that Miami establish a Diversity, Equity and Inclusion (DEI) Leadership Committee with primary responsibility to oversee diversity, equity and inclusion policy, programming and evaluation across the university. The DEI would report directly to the president; we propose that it replace the existing Council on Diversity and Inclusion (CODI).

Diversity, equity and inclusion are core values of Miami. We have invested significant time and effort to identify, critique and emphasize change in the climate on our campuses. However, there has not been a holistic approach to move the university community effectively and efficiently from recommendation to policy to coordinated action to actual climate changes that matter in everyday experiences.

One reason for our limited progress is that there is no central committee structured or empowered to effectively evaluate and respond to inequities and oversights in policy and practice across the university. The membership and structure of CODI are not designed to implement DEI audits, to establish necessary DEI trainings or to evaluate the progress on DEI initiatives.

The proposed DEI Committee should include representatives from each of the current six academic divisions, students and classified staff, as well as members from Enrollment Management & Student Success, Finance & Business Services, Athletics, the President's Office, Libraries, Student Life, Advancement and Information Technology.

The committee's attention should be directed to key policy and practice issues that need immediate attention, including but not limited to:

- Completing diversity, equity and inclusion audits of key policy and practice.
- Deciding on a coordinated approach to diversity, equity and inclusion that will guide the development of primary goals and metrics.
- Tracking diversity, equity and inclusion outcomes over time to celebrate success and to highlight areas for improvement.
- Investigating diversity, equity and inclusion training options and making recommendations where needed.
- Implementing a process for reflective evaluation by all divisions and units and for evaluating the effectiveness of all diversity, equity and inclusion-specific programming.

- Establishing a clearinghouse of best practices compiled across academic divisions and campus units.
- Providing timely feedback on unresolved recommendations, ongoing diversity, equity and inclusion issues, and progress to the campus community.

Recommendation #26: We recommend that Miami coordinate and align facility planning with the overall strategic plan.

As Miami implements its strategic planning efforts, there will be long-term impacts on the use of and need for academic buildings. Whether it be the development of new academic programs, such as those now under consideration in the Boldly Creative initiative, or changes that occur as a result of departmental or divisional realignment, facility and strategic planning activities must be aligned.

We recommend that a facility master plan be developed in concert with the strategic plan and be made public to constituents. The facility master plan should reflect the strategic plan's recommendations (especially #16 – Reorganization of Academic Structure), address and prioritize both new and renovation projects, and be updated on a regular basis to reflect changes to the strategic plan.

We also recommend that a revised process be developed for planning and approval of facilities work, specifically the creation of a central and strategic Facilities Committee with appropriate representation from constituent groups. Facility planning should reflect the needs associated with curricular and co-curricular innovations. We observe that the current review process is fragmented and typically decentralized. Current review committees (e.g. Space Utilization Group, Campus Planning Committee) are typically more reactive than proactive. A more comprehensive and strategic planning process would be managed by Physical Facilities, but closely coordinated with efforts of the proposed Facilities Committee.

Recommendation #27: We recommend that Miami improve its system for managing resources to enable agile, strategic investment in growing and high-demand programs using data to inform assessment and decision-making processes. Dashboards that demonstrate progress in both academic and administrative performance should be regularly distributed to the university community.

The guiding principles for future funding decisions should use the following criteria:

- All activity must be strategically aligned.
- Quality outcomes must guide all programming and services.
- Processes and programs must demonstrate agility and responsiveness to demand and societal needs.
- Productivity and efficiency must be enabled through continuous improvement.
- Data should inform all assessment and decisions regarding resource allocation.
- Miami should leverage technology to reduce low-enrolled or under-enrolled course sections and maximize instructional productivity.

To implement improvements, we propose that Miami:

- Explore technologies that maximize enrollment and minimize empty seats by asking students to indicate demand, followed by departments creating a schedule to respond to that demand, and then assigning students to class times.
- Monitor the financial performance of each academic division during 2019-20 through the transition from the original implementation of responsibility centered management (RCM) to the new budget model to (1) review this transition, (2) identify mechanisms to proactively preclude the risks of an RCM budget model, and (3) recommend adjustments to the new model that are aligned with the final report emerging from the Strategic Planning Committee.
- Measure and evaluate the productivity of auxiliary and administrative units, including the quality of their services. Use a benchmarking consortium and technology platform to enable this evaluation.
- Include Intercollegiate Athletics and other auxiliaries as active participants in the budget reallocation process, focusing on productivity contributions from the staff and operating

budgets for select units. The daily health, safety and well-being of student-athletes must not be compromised. ICA should look to strategically enhance revenue opportunities while reducing expenses.

Recommendation #28: We recommend that Miami develop a strategic enrollment management plan to achieve specific, measurable short-term and long-term enrollment targets for the quality and diversity of the incoming class – with particular attention to net tuition revenue. The plan should include a strategy for sustainable tuition discounting and prioritize net tuition revenue while Miami works to diversify revenue. It should prioritize university targets for quality and diversity over specific enrollment goals for academic units, manage resources to achieve these priorities and communicate the priorities to the university community.

Each year, we strive to improve the quality (ACT, curricular strength, etc.) and diversity (under-represented minorities, first-generation students, students from low socioeconomic backgrounds) of the incoming class. We examine the size and composition of the incoming class by considering the scholarship spending necessary to generate the class, the percentage of non-resident students and the resulting net tuition revenue. The interdependence of these elements – quality, diversity, net tuition revenue – presents a significant challenge. Miami's scholarship budget increased 59% from 2014-15 to 2018-19. **This rate of growth is unsustainable.** Our brand – how well we are known and what we are known for – impacts all three elements. A strong Miami brand can help lower our discount rate on quality and perhaps on diversity because the brand will carry us forward. There are competing aspirations and difficult choices to be made, but it is imperative to set priorities.

Recommendation #29: We recommend that Miami clearly define and aggressively market our brand as closely coupled with student success and the dedication of talented faculty and staff.

A common theme heard throughout the planning process was that Miami could do an even better job of telling our story of student and faculty success. With more than 40% of our students from outside of Ohio, there is widespread knowledge about Miami. But a consistent

message could facilitate progress toward the university's strategic goals. The message should emphasize the value of the Miami experience. There is a place in the higher education market for a strong liberal arts education featuring a four-year plan for intentional entry into careers.

Miami should prioritize transparency about student success outcomes through marketing and websites. For example, career placement data for every major should be readily available and consistently located on department websites for prospective students and parents. We should develop a plan to help faculty and staff refine our messaging about our brand and articulate it to multiple audiences. We should market faculty and staff success stories to external audiences. These stories should recognize and promote the diversity of exemplary teacher-scholars across the disciplines.

Recommendation #30: We recommend that Miami increase the external visibility of its research and reputation, focusing on the strength of cutting-edge research of Miami faculty and students. The university should develop strategies to enhance Miami's reputation and external visibility as an institution where meaningful research takes place.

Just as Miami must market its academic message aggressively, we also must do a better job marketing our research. Although Miami's reputation for teaching excellence is rightfully strong, our faculty includes top researchers. The committee believes that the message about their work and the work with student research partners could be disseminated more effectively. Miami should increase external visibility of research through its website, social media and press releases.

Implementation Timeline

The committee recognizes that this plan includes an array of strategies that will require an extensive effort by faculty and staff across the university. We also recognize that this is a five-year plan and that the 30 recommendations need to be prioritized. This is always a difficult challenge in any planning process, since every recommendation is viewed as important to organizational success. Because many of the recommendations will be carried out by different faculty and staff across campus, we do propose that a large number of our recommendations can be implemented during the first two years of the plan. We have placed our recommendations into two time periods to recognize that we cannot implement every recommendation at once. Because some recommendations build on others, the implementation time period does not reflect level of importance. We also assert that some of

the recommendations need to be implemented simultaneously and that these efforts be coordinated. *(See highlighted recommendations in Table 2.)* We recommend that the ongoing Strategic Planning Committee serve this coordinating function, similar to the work of the current steering committee. The new ongoing committee members would serve as co-chairs on the various implementation committees recommended in the plan in order to ensure coordination. As a living document, the plan will need to be adapted over the course of the next five years, but our recommended timeline is included at the top of the recommendations section:

A Final Note: A Commitment to Implementation

Change is difficult for both human beings and organizations. It requires more than agreement on priorities and action steps. Our community must commit to meaningful and lasting change. Some of the recommendations in this report are not new. Several actually appeared in our 2010 Strategic Priorities Committee report, including increased endowment funds for scholarships, a systematic review of majors, maintenance and support of a smaller number of graduate programs and a careful review of department and divisional structures. These are difficult areas to address. But given the external environment Miami faces today, it is critical that we move forward and carefully assess these areas of change. Throughout the planning process, we often heard about barriers created by a Miami culture that was resistant to change. Frequently, our first administrative reaction goes to why an idea cannot be implemented, rather than asking why it is important, and if so, how we can make it happen. The planning and innovation literature talks about “culture eating strategy for breakfast.” In order to innovate, it will be necessary for Miami to address the cultural barriers that have evolved. We began our planning process by emphasizing Miami’s position of strength. In fact, as we complete this document, we have seen news about our large and accomplished incoming Class of 2023. This success is a good thing, which will allow us to continue to invest in our future. But that should not conceal our long-term reality: Miami must adapt to future challenges faced by higher education across the nation. We believe this strategic plan is a step in that direction.

Listing of Subcommittee Members

Academic Excellence Subcommittee

Renée Baernstein, HST and CAS, co-chair

Sherrill Sellers, FSW and EHS, co-chair

John Bailer, STA

Terri Barr, MKT and University Senate

Megan Cremeans, Undergraduate Student

Thomas Mays, CMR

Kevin Messner, Libraries
Jonika Moore, EMSS
Steve Norris, HST and Havighurst Center
Brody Ruihley, KNH
Joshua Smith, Hamilton City Manager
Andrew Sommers, MME
Scott Sportsman, EMSS
Todd Stuart, CCA Arts Management
Thai Wright, Graduate Student
Ellen Yeziarski, CHM and Center for Teaching Excellence

Diversity, Equity and Inclusion Subcommittee

Denise Taliaferro-Baszile (Educational Leadership), co-chair
Moira Casey, (English/Languages, Literatures and Writing), co-chair
Fauzia Ahmed (Sociology and Gerontology)
Tim Greenlee (Farmer School of Business)
Nishani Frazier (College of Arts & Science)
Jacqueline Johnson (Miami University Libraries)
Jennie Gilbert (Athletics)
Gwen Fears (Student Life)
Steve Large (Student Life)
Amy Yousefi (Chemical, Paper and Biomedical Engineering)
Courtney Rose (Student)

Excellence in Research and Scholarship Subcommittee

Bill Even (ECO), co-chair
Vaishali Raval (PSY), co-chair
Katy Abbott (SOC/GTY)
Naz Bautista (EDT)
Devon Delvecchio (MKT)
Annika Fowler (ASG, Student Representative)
Jeff Kuznekoff (CLAAS)
Amanda McVety (HIS)
John Millard (Library Representative)
Rick Page (CHM/BIOCHM)
Kumar Singh (MME)
Pepper Stetler (ART)

The National University Subcommittee

Aaron Shrimplin (University Libraries), co-chair
Diane Delisio (College of Engineering and Computing), co-chair
Sara Al-Zubi (Undergraduate Student/National Fellowships)
Zeb Baker (Honors)
Patrick Carroll (Grad student/PHY)
Mike Crowder (CHM & BIOCHM/CAS)
Karla Guinigundi (Global Initiatives)
Barnali Gupta (ECO/FSB)
Tim Holcomb (Entrepreneurship/FSB)
Fazeel Khan (MME/CEC)
Cody Powell (AVP, PFD)
Susan Schauer (EMSS)
D'Angelo Solomon (Associate AD, ICA)
Kim Tavares (AVP, Alumni)

Rose Marie Ward (Associate Dean, Grad School/KNH)
Steve Wright (STA/CAS)

Transformative Student Experience Subcommittee

Elise Radina (FSW), co-chair
John Weigand (ARCH), co-chair
Kimberly Moore (Dean of Students)
Vicka Bell-Robinson (Director, Residence Life)
Craig Bennett (EMSS)
Jen Franchek (Career Exploration)
Bre Robinson (Associate AD)
Pete Haverkos (Assistant Dean)
Dr. Doug Ross (MD –Tri Health)
Amy Macechko (Community)
Megan Gerhardt (MGT)
Cheryl Young (Assistant Provost)
Brian Kirkmeyer (CEC)
Anna Klosowska (FRE-ITL)
Edith Liu (student, RHA, NRHH, ASG Senator)
Jacob Bruggeman (Student, Humanities)

Financial Sustainability Subcommittee

Stacey Lowery Bretz (CHM), co-chair
David Ellis (FBS), co-chair
Pat Haney, (Associate Dean, POL) – RCM Committee
Bob Davis (Regionals)
Thomas Poetter (EDL)
Jude Killy (ICA)
Brent Shock (EMSS)
Amit Shukla (MME – former chair Fiscal Priorities)
Mary Ben Bonham (ARCH)
Bruce Guiot (Chief Investment Officer)
Dawn Fahner (Associate VP)
Ruth Groom Assistant Provost)
Caroline Weimer (Student, ASG)

Strategic Planning Update

Board of Trustees – June 2019



Strategic Planning Steering Committee



- Academic Excellence: Sherrill Sellers & Renee Baernstein
- Research & Scholarly Success: Vaishali Raval & Bill Even
- Diversity, Inclusion & Community: Denise Taliaferro Baszile & Moira Casey
- Transformative Student Experience: Elise Radina & John Weigand
- Financial Sustainability: Stacey Lowery Bretz & David Ellis
- National University: Diane Delisio & Aaron Shrimplin
- Subcommittees include 62 faculty & staff from across the University, 10 students & two community members

The Process We Followed



- November/December: Met as a steering committee, collected input
- January-March: Subcommittees developed ideas (>100 meetings total)
- January-March: Co-chairs held >30 listening sessions with input from 600 faculty, staff & community members
- April-May: Steering committee generated recommendations
- June: Presented to Board of Trustees
- Fall 2019: Launching the hard work of implementation



A Summary of Recommendations

Innovate	Invest	Invigorate	Implement
#1-Establish Honors College	#8-Improve infrastructure to support research & scholarship	#16-Reorganize academic structure	#24-Establish ongoing Strategic Planning Committee
#2-Enhance cross-unit curricular collaborations	#9-Improve faculty culture for involvement in externally funded research	#17-Transform the Global Miami Plan	#25-Establish Diversity, Equity and Inclusion Committee
#3-Cultivate cross-disciplinary research	#10-Improve approach to how faculty resources are allocated to align with strategic initiatives	#18-Redesign curricular process	#26-Coordinate facilities planning with strategic plan
#4-Position Miami as a teaching & learning national resource	#11-Enhance student retention strategies	#19-Complete curriculum review: undergraduate	#27-Improve allocation of resources to align w/strategic plan priorities
#5-Develop a curricular "innovation lab" for experimentation	#12-Substantially increase endowment to support scholarships	#20-Complete curriculum review: graduate	#28-Develop strategic enrollment management plan
#6-Renew partnership between academics & residence life	#13-Provide necessary resources to Miami students studying abroad or away	#21-Develop master plan for e-learning	#29-Clearly define and market Miami strengths
#7 Redesign our student academic advising system	#14-Enhance the relationship between Miami and the city of Oxford	#22-Create plan for revenue-generating graduate degrees & certificates	#30-Enhance external visibility of research
	#15-Review recommendations from existing Sustainability Committee and align with plan	#23-Revise program review goals and process to align with strategic plan	

Disruptive Change = Challenging Implementation



"Culture eats strategy for breakfast."

- Peter Drucker

- Delivering excellence and innovation – at the same time.
- Focusing on vision and big ideas
- Creating a structure to promote innovation

Ongoing Strategic Planning Committee

Coordination with initiatives across Miami

Strategic Planning Update

Questions & Discussion

