

UPDATED 10/1/10

Guidelines for Strategic Planning Task Force Reports

Background

See <http://info.ncsu.edu/strategic-planning/> for information about the overall strategic planning website, including timeline and other task forces.

The Strategic Planning Committee (SPC), which will coordinate the task forces and weave together their reports into a single strategic plan, is co-chaired by Interim Provost Warwick Arden and Faculty Chair Margery Overton. Other members of the SPC include the task force co-chairs and representatives of the faculty, students, staff, deans, and executive officers.

Nine task forces were formed around key strategic issues identified at a University Council retreat in July 2010. The roughly 160 task force members were selected from more than 400 faculty, students, and staff nominated by members of the University Council and others across campus.

Based on the retreat discussion, several questions were framed to illustrate each issue. These questions are included in the task force charge letters and posted on the Web site. However, the task forces are free to focus their deliberations in their own way; they need not be constrained by these questions.

Report Format

Please organize your final report using the following outline.

1. **Context:** Describe the central challenges facing NC State that are key to our success in this area. Provide a brief overview of NC State's activity that is relevant to those challenges.
2. **Goals and strategies:** What should NC State strive to achieve in this area during the next 5 to 10 years? What broad, university-wide, multi-year strategies should we adopt that will be "game changers"?
3. **Specific Recommendations:** Propose and prioritize 2 to 5 specific initiatives to move NC State toward these goals and to implement these strategies. Be bold! (Examples include improvements to existing programs, services, policies, and practices; elimination of unnecessarily duplicative or outdated programs and services; and new approaches and practices.) Suggest implementation details, including who, what, how, and when. Include a general estimate of new costs (if any) that would be required for implementation (e.g., positions, operating funds, and infrastructure).
4. **Metrics:** By what metrics shall we monitor our progress toward the goals and the implementation of specific initiatives? Select metrics that measure outcomes and results, rather than processes. If available, provide baseline data as well as targets for 2015.

Preliminary Reports

In early December, co-chairs will be asked to present informal, preliminary reports. In these 1-3 page reports, please highlight the Goals and Strategies (#2) and Specific Initiatives (#3) that you expect to include in your final reports. This report may be as simple as a list of Strategies and Initiatives with a 1-2 sentence description of each. Or, you may use the draft text for your final report. Please take whichever approach is most efficient for you. You may *exclude* the Context (#1); implementation details and costs (#3), and metrics (#4). The SPC will provide feedback and coordination across task forces at the meetings scheduled for that time. In addition, an updated version will be used to solicit feedback and support from the University Council in January.

Ideas

As you develop your report, consider the following.

- **Fundamental university values and commitments.** The following were tentatively identified by the Strategic Planning Steering Committee this summer and will be reviewed by the Strategic Planning Committee this fall.
 - Innovation
 - Sustainability
 - Diversity
 - Adequate and efficient use of resources
 - Economic development
- **Expertise.** Rely on your own experiences and solicit input from other individuals or committees with expertise on the issues of interest. *For example, the Comprehensiveness and Interdisciplinarity task force might talk to members of the 2008 task force on multidisciplinary programs, or the Research and Scholarship Task Force might build on the work of the University Research Committee.*
- **Campus data.** Check out University Planning and Analysis (UPA) <http://www2.acs.ncsu.edu/UPA/>, where you can find the results of student, faculty, and staff surveys; comparisons of NC State with its peers; and basic campus data. Other useful Web sites include SPARCS at <http://www.ncsu.edu/sparcs/reports/index.php>, <others here>.
- **Campus input.**
 - The university strategic planning Web site provides an opportunity for the entire community to provide input. This information will be regularly routed to task force co-chairs.
 - Watch the strategic planning Web site for events, such as the General Faculty meeting on October 5, which will serve as a Town Hall event for the Faculty Excellence Task Force.
 - Attend Chancellor's installation and Town Hall, October 26. The Town Hall will be organized as an opportunity for the campus community to share their ideas related to the strategic plan.
 - If you want to solicit additional campus input, contact Karen Helm; this will be coordinated with other task forces' efforts, as needed.
- **Overlap.** There will be some overlap in the focus and interests of the task forces, which could lead to innovative ideas and broader perspective. Task force co-chairs can solicit new ideas and reconcile competing ideas at meetings of the Strategic Planning Committee.

Assistance

- Staff support to your task force (e.g., for scheduling meetings) will be provided by one of the co-chairs.
- For information and assistance related to the university's strategic planning Web site, contact Marielle Poca (5-1283).
- Questions related to the overall process, task force report guidelines, open meetings requirements, and requests for university data may be directed to Karen Helm (5-6648).

Satisfying the Open Meetings Law

- Send dates, times, and locations of meetings to marielle_pocan@ncsu.edu at least 3 days in advance.
- Take minutes of task force meetings, and maintain a file of all task force records.