



The University of Louisiana at Monroe

University Strategic Plan - LEVEL I

April 21, 2004

INTRODUCTION

Background

As The University of Louisiana at Monroe (ULM) nears its 75th anniversary, the academic community, students, alumni, and other key constituencies in the ULM family find themselves at an exciting moment. Both for those who are new to the University and for those whose professional lives at the institution go back many decades, the current leadership and energy have sparked a rebirth of the old spirit of pride and a sense of expectation that extends into the external community and the alumni family. Together with many other University initiatives, the ULM Strategic Planning process typifies this pride.

President James E. Cofer initiated the strategic planning process in April 2003 with a two-day strategic planning seminar, which was facilitated by a national strategic planning expert. Afterward, and in consultation with the college Deans and the Vice-President for Academic Affairs, the President appointed a Steering Committee to lead the fourteen task forces that were planned. Two ULM students were also named to the Steering Committee itself. In the days following these appointments, total membership on the strategic planning task forces grew to more than 125 members. Each task force then received its charge in successive meetings with the President and the outside facilitator, and the process was underway.

Now, twelve months later with the completion of the Level One Strategic Plan, the University has a primary guide for the next five years. This plan will provide direction for many institution initiatives, the allocation of resources, and University assessment.

The plan itself is not the end result. Under the leadership of President Cofer, The University of Louisiana at Monroe has formalized a broad, inclusive, public process that is to be ongoing, comprehensive, and dynamic. ULM now possesses a participatory planning process that will connect decision-making on every level to a larger plan. This process will be repeated in five-year increments, thus ensuring a consistent pattern of involvement in University planning.

Challenges

In the data gathering and analysis stages, several key challenges to the University's progress and success became evident. These included the lack of a consistent, positive image; an uneven integration and involvement of the academic and staff units at the university; and inconsistent expectations. The Steering Committee felt it necessary to acknowledge these difficulties very quickly and to present the challenges as opportunities that will spark action. In fact, many of the strategic initiatives are intended to meet these challenges. The Steering Committee found that ULM must continue to develop the following:

- ◆ A strong, positive, widespread University image.
- ◆ Involvement and interaction of the internal and external constituencies of the University.
- ◆ A consistent set of values.
- ◆ A clear role within the service region.
- ◆ Accountability of all University units.
- ◆ Financial support from supporters, alumni, and the community.
- ◆ Expectations that match University identity and goals.

Comparative Advantages

On the positive side, the data analysis also identified a number of distinct advantages that ULM possesses:

- ◆ Faculty provides exceptionally high quality instruction.
- ◆ Low student/faculty ratio allows individualized instruction.
- ◆ Location in a reasonably safe, moderate-sized urban location presents students with opportunities for employment, cultural activities, and social life. It also presents the University with opportunities for business and corporate ties, internships, and other forms of mutual support.
- ◆ Recognized areas of program excellence and distinction that include, but are not limited to, allied health sciences, teacher education, and gerontology.
- ◆ Administrative philosophy of leadership, student engagement, and sound management.

Constituencies

Many distinct groups comprise the University's family, and each group plays a crucial role.

Students are the focus of the University and include part-time, full-time, traditional, and nontraditional types. We consider both prospective and current students essential constituencies. The ULM student body is diverse, being composed of the different genders, as well as people of different race, ethnic background, and nationality.

Faculty forge the University's intellectual identity. Their talent, knowledge, and expertise offer successive generations of students the opportunity to succeed academically and the challenge to grow in personal and social ways.

Staff provide and maintain the institution's vitality in terms of its processes and its service to the students, faculty, and community.

Alumni provide the continuity and connections between successive generations of ULM graduates as they create a strong presence in the larger community.

Community members have a significant stake in the institution given the University's economic impact upon the region's well-being. ULM's growth and welfare have a profound significance for the service region, not only for economic reasons but also for the cultural, academic, and intellectual development the University makes possible.

Supporters are those who may live near or far but who have an attachment to the institution and a sense of its mission. They may benefit from the University directly, or they may sense the importance of the institution to the larger community. Supporters use ULM's facilities, attend its events, and follow its programs.

Employers can meet their hiring needs because the University provides a renewable source of qualified, educated professionals for the workplace.

VISION STATEMENT

Within the decade, The University of Louisiana at Monroe will be recognized as a preeminent student-centered university with learning as its primary goal.

THE UNIVERSITY OF LOUISIANA AT MONROE

MISSION STATEMENT*

The University of Louisiana at Monroe (ULM) is a selective admissions, comprehensive senior institution of higher education. It offers high quality academic and professional programs to meet the intellectual, cultural, vocational, social, and personal needs of its students. The University offers both traditional and innovative graduate and undergraduate programs in the Colleges of Arts and Sciences, Business Administration, Education and Human Development, and Health Sciences.

ULM's mission is to serve its students and community through teaching, research, and service. On a dynamic and diverse campus that is technologically modern and conducive to learning, students are nurtured and encouraged to broaden their values, intellect, interests, talents, and abilities to become thoughtful and productive citizens. ULM also recognizes its responsibility as a community leader and is committed to improving the general quality of life through pure and applied research, clinics, teacher education, and partnerships. A major center for the health sciences, the University provides the public with valuable healthcare resources. Recreational opportunities are offered through intramural and intercollegiate athletic programs.

Learning is ULM's main focus. Faculty and staff are committed to offering a complete educational experience. ULM's goal is to produce graduates who will be successful in their chosen fields by promoting excellence in education and stressing social responsibility and individual accountability.

The University serves its students and the community by sponsoring quality research programs and creative activities that promote learning and improve the quality of life. This research includes, but is not limited to, public and scholarly presentations and publications on every level. Such activities give the University a competitive advantage, and each academic department is challenged to be actively engaged in research. Extramural funding and grant writing are valuable kinds of scholarly activity, and ULM supports faculty efforts in securing such research funds.

ULM also serves the community by sharing its expertise and facilities with the public. The region's quality of life is improved through University partnerships and internships with other academic institutions and with both public and private entities. Through its physical and academic resources, ULM serves as a cultural center to promote the area's unique arts, archaeology, history, folk life, and natural sciences.

*The mission statement for the strategic plan is presented here. The University's mission statement is published in the Louisiana Board of Regents Master Plan for Public Post-Secondary Education: 2001.

CORE VALUES

Excellence

Excellence reflects personal expectations and regional, national, and global standards. It is pursued through diligent individual and collective efforts and is achieved by setting the highest goals possible for each individual and not resting until those goals are attained.

Scholarship

Scholarship includes original research, the development of new interpretations, applying knowledge to solve problems, and the sharing of knowledge through teaching. We believe scholarship defines a university's intellectual climate and culture. Students and faculty are encouraged to follow ULM's motto, "Seek the Truth," through scholarly activities.

Diversity

Diversity in academic programs, traditions, experiences, perspectives, opinions, ethnicity, and culture enriches and unifies a university. We celebrate uniqueness in our students, faculty, and staff because diversity expands the opportunity for learning.

Responsibility

Responsibility includes acting morally and ethically, as well as being accountable for one's actions. Students, faculty, and staff have a duty to act with these standards in mind. We also recognize our duty to be thoughtful stewards of those resources entrusted to us.

STRATEGIC THEMES

I. Centering on Students

II. Developing an Academic Core

III. Cultivating Climate and Culture

IV. Extending External Relationships

V. Building the Campus Physical Environment

I. CENTERING ON STUDENTS

The University of Louisiana at Monroe's primary focus is its students. ULM's students, faculty, and staff constitute a team in which students take primary responsibility for their success, assisted by faculty and staff, and facilitated by a stimulating university environment. The University strives in every way to nurture its students, encouraging them to broaden their values, intellect, interests, talents, and abilities to become thoughtful and productive citizens.

To achieve its strategic vision of being a student-focused university, ULM will:

Goal I.1: Create opportunities featuring varied aspects of campus life, community involvement, and leadership.

Objectives:

Objective I.1.1: Establish cultural, intellectual, and recreational opportunities for all ULM students, so they can participate in a full range of extra-curricular educational activities and in social campus organizations and associations.

Objective I.1.2: Improve student participation and access to community involvement experiences.

Objective I.1.3: Advance opportunities for students to gain experience in leadership positions.

Goal I.2: Develop opportunities for lifelong learning fostered through vital interactions between students, faculty, staff, and community.

Objectives:

Objective I.2.1: Enhance established programs of academic excellence.

Objective I.2.2: Develop progressive programs that lend distinctiveness to the University.

Objective I.2.3: Provide innovative educational opportunities for students of all ages and backgrounds. These students include those adult learners who need alternative time schedules and those who are considering career changes, while all are encouraged to enjoy the experience of life-long learning.

Goal I.3: Offer diverse experiences which encourage the sharing and appreciation of different cultures, heritages, thoughts, and points of view.

Objectives:

Objective I.3.1: Broaden the scope of events which expose students to new and diverse perspectives.

Objective I.3.2: Review and update on a continual basis policies and procedures that affect the quality and diversity of student life.

Objective I.3.3: Develop a vibrant entity in the University which fosters appreciation and respect for the region's unique art, culture, literature, history, archaeology, folk life, and natural sciences.

Goal I.4: Develop efficient, productive student services.

Objectives:

Objective I.4.1: Provide comprehensive and convenient campus services for students, faculty, and staff.

Objective I.4.2: Develop a technology plan that assures modernity and efficiency within all facilities and services.

II. DEVELOPING AN ACADEMIC CORE

Consistent with its University status and according to its collegiate responsibilities, ULM will provide its students, faculty, and staff with an excellent academic environment. This level of excellence will be established and maintained by ensuring scholarship through worthy programs. These programs include the traditional liberal education pursuits and applications in the professional curricula.

To achieve its strategic vision of being a student-focused, learning-centered university, ULM will:

Goal II.1: Establish and maintain an academic identity.

Objectives:

Objective II.1.1: Identify, develop, and maintain traditional and progressive curricula.

These curricula will emphasize teaching, research, and service and will exploit the University's existing strengths, geographical advantages, and distinctiveness. The phrase "traditional programs" refers to curricula heretofore considered as centers of excellence at ULM, programs such as teacher education, health science programs, atmospheric science programs, gerontology, and insurance. The curricula to which the term "progressive curricula" apply are developing.

Objective II.1.2: Discover and communicate knowledge effectively through a balance of internal and external scholarship elements. These include:

- a. Internal: research, integration, application, and teaching.
- b. External: service and internships.
- c. Promote cutting edge interdisciplinary programs and partnerships with community, local, and state liaisons.

Objective II.1.3: Develop and maintain programs designed to provide educational opportunities.

Objective II.1.4: Develop and maintain dynamic relationships with other academic institutions which can further ULM's goals.

Objective II.1.5: Procure, develop, and maintain contemporary technological vehicles for knowledge acquisition and dissemination.

Goal II.2: Maintain and further enhance academic quality.

Objectives:

Objective II.2.1: Balance programs against financial resources.

Objective II.2.2: Challenge each department to increase scholarly productivity.

Objective II.2.3: Increase accountability for faculty, students, staff, and administrators.

Objective II.2.4: Elevate performance expectations for faculty and students.

Objective II.2.5: Pursue scholastic diversification.

III. CULTIVATING CLIMATE AND CULTURE

Goal III.1: Develop a commitment to excellence within all elements of the University.

Objectives:

Objective III.1.1: Elevate the level of expectation in everyone's performance.

Objective III.1.2: Identify the needs of and provide professional development for faculty and staff.

Objective III.1.3: Develop and employ incentive and recognition initiatives.

Objective III.1.4: Pursue diversification of faculty, staff, and students.

Goal III.2: Develop a sense that the University is the mutual responsibility of the students, faculty, staff, alumni, and community.

Objectives:

Objective III.2.1: Promote shared governance.

Objective III.2.2: Decentralize and broaden participation in all University planning processes.

Objective III.2.3: Educate all constituents about their roles as ULM's partners.

Objective III.2.4: Involve students, faculty, staff, and alumni with the community and provide opportunities for the community to be involved with the University.

Goal III.3: Develop an effective and efficient University organization.

Objectives:

Objective III.3.1: Develop a more effective campus-wide communications system.

Objective III.3.2: Maintain and communicate a clear and consistent organizational chart.

Objective III.3.3: Develop consistent and strong leadership throughout the University.

Objective III.3.4: Continue activities that cultivate an atmosphere of mutual trust and openness.

Objective III.3.5: Streamline services through the utilization of technology and best practices.

Objective III.3.6: Develop a comprehensive, consistent set of policies and procedures for the University's operations.

IV. EXTENDING EXTERNAL RELATIONSHIPS

The University of Louisiana at Monroe is committed to the community and the entire region in which it is located. Its students, faculty, administration, and staff are active participants in the community through many avenues. ULM promotes its involvement in the community and encourages the community to become more involved with the University. The institution must maintain and expand relationships with all of its constituents, from the “Twin Cities,” throughout northeast Louisiana, and beyond.

ULM must integrate completely with the people of Monroe, West Monroe, and northeast Louisiana so that all people in proximity to ULM take ownership of the University with the attendant loyalty, pride, and commitment of resources.

To achieve its vision of being an externally focused university, ULM will:

Goal IV.1: Meet the needs of businesses and industries by increasing the number and quality of community partnerships.

Objectives:

Objective IV.1.1: Strengthen partnerships with area/regional businesses and industries.

Objective IV.1.2: Prioritize the University’s role as the region’s intellectual, cultural, social, and economic center.

Objective IV.1.3: Enhance relationships with other academic institutions.

Goal IV.2: Cultivate opportunities for the University’s alumni and friends to further ULM’s mission by giving of their time, talents, and treasure.

Objectives:

Objective IV.2.1: Develop a plan to engage the large number of nearby alumni in the University’s life on a consistent basis.

Objective IV.2.2: Create and implement a plan to enlarge the University’s annual fund and endowments.

Objective IV.2.3: Steward ULM’s political support.

Goal IV.3: Assert a clear and consistent identity for the University.

Objectives:

Objective IV.3.1: Communicate more effectively with internal and external audiences.

Objective IV.3.2: Develop and implement a marketing plan for the University.

Objective IV.3.3: Develop and implement a marketing plan for Athletics.

Objective IV.3.4: Increase the number and variety of campus events that bring the community and University together.

V. BUILDING THE CAMPUS PHYSICAL ENVIRONMENT

Attractive, well-equipped, and well-maintained buildings and recreational spaces that are sufficient in size and number are prerequisite to the success of ULM's recruitment and retention efforts. As the primary venue for learning, discovery, and living, the campus physical environment significantly affects the University's academic, cultural, and social life. These facilities, furthermore, contribute greatly to the institution's external and internal image, as well as the *esprit* that unites the members of the immediate University family.

To provide a superior quality environment, the University will:

Goal V.1: Develop, implement, and maintain a campus facilities plan.

Objectives:

Objective V.1.1: Complete a facilities utilization study that will determine the adequacy of University space and address safety, accessibility, and security.

Objective V.1.2: Identify opportunities for improvement in and enhancement of campus growth, including construction, renovation, and pedestrian and vehicular traffic flow.

Objective V.1.3: Identify and exploit unique facilities and cultural resources.

Goal V.2: Develop, implement, and maintain a comprehensive maintenance program.

Objectives:

Objective V.2.1: Expand and improve the system of maintenance reporting, response, and assessment.

Objective V.2.2: Establish a proactive approach to identifying and addressing weaknesses to minimize major maintenance problems.

Goal V.3: Formulate a University-wide technology plan.

Objectives:

Objective V.3.1: Create an organizational structure that will effectively address the technological needs of all University divisions.

Objective V.3.2: Identify best practices that can be adopted as benchmarks for technology infrastructure, equipment, and software.

Objective V.3.3: Enhance the technological literacy of faculty, staff, and students through coordinated training efforts.

EPILOGUE: THE ULM STRATEGIC PROCESS AND ITS FUTURE

On March 17, 2003, President Cofer hosted a seminar on strategic planning, facilitated by an outside expert who works with universities to produce such plans. Following this seminar, a Steering Committee was appointed by the President after consultation with the college Deans and the Provost. The unusually large number of fourteen Steering Committee members reflected the President's desire to create a high number of individual task forces, each having as chair a Steering Committee member. Students were also asked to serve on the Steering Committee itself. We were informed early on that many universities involved in a similar process use from six to nine task forces, while others have a single central task force; ULM's philosophy has been to include as many of the campus and community constituencies as possible in the strategic planning process.

The Steering Committee consisted of the following members:

Eric Pani (Academic Program Review Chair); Nick Bruno (Human Resources Chair); Carlos Fandal (Image Chair); Jeff Galle (Facilities Chair); John Rettenmayer (Finances Chair); Paul Sylvester (Climate and Culture Chair); Tammy Parker (Athletics/Student Services Chair); Dorothy Schween (Administrative Services Chair); Charles Pryor (Values Chair); Traci Murphy (Governance Chair); Mark Arant (External Economics/Technology Chair); Robin Evans (Educational/Social/Demographic Chair); Joe McGahan (Legislative/Political/Competitive Chair); Terry Jones (Editing Chair); Bill Krutzer (Community leader member); Evan Earl (Student member); and Janeca Foster (Student member).

The members then selected Jeff Galle to chair the Steering Committee, and the ULM effort was underway. Following in rapid succession were the nomination and confirmation of 125 members for the individual task forces. Each task force then met as a group with the facilitator to receive the parameters of their mission and to hold some general discussion concerning their first tasks. Additionally, each task force chair met with President Cofer to refine and focus specific charges. By May 10, 2003, all of this was completed, and the work of individual task forces began.

From the end of the spring semester through September, the task forces worked to gather data in ways that seemed appropriate for the particular area under analysis. Task forces focusing on internal matters were to organize the data in terms of a strengths/weaknesses assessment, while those with an external focus were to present an opportunities/threats assessment. In this SWOT analysis, each chair, in consultation with task force members, decided which methods of soliciting data would be most appropriate for their area. This freedom led to a number of different kinds of data gathering, including one-on-one interviews, analysis of such existing reports as the ACT Student Survey, standardized surveys sent to larger groups, expert panels, and individually prepared surveys for special groups. The culmination of the SWOT analysis was the production of a 6-10 page report by each task force. These reports were submitted to the Steering Committee in September.

These various kinds of data deserve a brief mention. The thoughts of several thousand ULM students and more than 7,000 alumni became a part of this effort through the detailed ACT Student

Survey and an alumni email survey. Separate surveys also were created for the faculty and the staff to solicit valuable feedback on many different areas of the University. Some task forces employed the individual interview as a method to solicit opinion.

The expert panel became another useful way to gather good information, and in the summer three of these expert panels were organized—Education/Culture, Economics/Technology, and Legislative/Political. In the summer of 2003, when these panels were formed, the expert participants who agreed to serve held the following positions.

The Education/Culture panel consisted of:

Kathy Spurlock (Executive Editor of *The News Star*), Loren Blanchard (Vice President for Accreditation, University of Louisiana System), Tommy Usrey (Director, Northeast Louisiana Arts Council), Frank Hoffmann (Director of Personnel and Assistant Superintendent, Ouachita Parish Schools), Betty Carroll (Morehouse Parish Schools), and Ralph Calhoun (Executive Director of Biedenharn Museum and Gardens).

The Economics/Technology panel included:

Mark Anderson (CEO, Mid South Extrusion), Sue Edmunds (President, West Monroe/West Ouachita Chamber of Commerce) Malcolm Maddox (Regional Chairman, Hibernia National Bank), Tom Nicholson (President, Strauss Interests), Michael B. Taylor (State Director, USDA Rural Development), and Joan Tyler (Quality Manager of Guide Corporation).

The Legislative/Political panel consisted of:

Senator Bill Jones, Representative Francis C. Thompson, Mayor Jamie Mayo (Monroe), Mayor Dave Norris (West Monroe), Mayor Clarence Hawkins (Bastrop), Wayne Parker (Louisiana Board of Supervisors), and Harvey Hales (Shelter Insurance).

As mentioned above, each task force produced a 6-10 page report after gathering the necessary data. The Steering Committee studied each of these in great detail, and there emerged a deeper understanding of the University's internal and external environment. Awareness of the various challenges also came from this analysis and study, as did a deeper knowledge of the advantages that ULM possesses. Strategic ideas, objectives, and initiatives began to take shape as these reports were discussed by the Steering Committee. Ultimately, a complex set of more than seventy strategic ideas were identified.

These strategic ideas were eventually clustered into five general themes—Focusing on Students, Developing the Academic Core, Cultivating Climate and Culture, Extending External Relationships, and Building the Campus Physical Environment.

Understandably, the Steering Committee members were very familiar with the individual area that each had originally analyzed. As a result, it was felt necessary to regroup committee members in new ways to give the entire process a more dynamic analysis by having new people take a fresh

look at each area. Consequently, the Steering Committee was reorganized into “theme teams” of two or three members each. Each team studied a particular thematic area and organized the strategic ideas pertaining to that area into the traditional rendering of Goals and Objectives.

This part of the analysis was time-consuming and very detailed because the Steering Committee had to be certain that no centrally important idea was lost in the new groupings. Once the objectives had been clustered according to the five central themes, and goals were set for each theme, the objectives were placed within each. A strategic plan rough draft was then produced, and gradually over successive weeks, each section was refined as it was reexamined. ULM’s Level One Strategic Plan is the end result of twelve months of intense work.

The Steering Committee expresses gratitude to every person who contributed to this effort. In the first six months, as the task forces worked in their respective areas, many University family and community supporters offered their time and expertise to contribute to the data snapshot that was being taken.

Now that the Strategic Plan is complete, the University will develop action plans for every University unit. These action plans in the colleges and at the departmental level will emerge from and extend beyond the original Strategic Plan. Thus, the end of one process marks the beginning of the next. We are entering even more exciting times as our University moves ahead.

April 2004

Jeff Galle

Chair, Strategic Planning Steering Committee