

Vision in Action

Project Report

Prologue: The VIA Process

Following a Strategic Planning Retreat in the summer of 2003, Chancellor Victor Boschini appointed a Strategic Planning Steering Committee (SPSC) on September 1st to develop an in-depth, participatory process for setting the priorities for the future of TCU. Thus, Vision in Action (VIA) was born. That same month, TCU engaged the services of Kaludis Consulting, a higher education strategic planning and management firm based in Washington D.C., to guide the design and implementation of VIA.

The basic concept was to build upon TCU's strengths, including the firm financial foundation established by Chancellor Emeritus William E. Tucker and the infrastructure developed by Chancellor Emeritus Michael R. Ferrari through *The Commission on the Future of TCU*. The planning process built on these past accomplishments and took into account current economic conditions and University aspirations. A vital aspect of the strategic planning process was the involvement of the TCU community at critical steps throughout the process, and key to accomplishing this comprehensive involvement was effective communication. To that end, the VIA website was established as the principal means of informing all members of the TCU family about the process and to provide access to information developed during the process.

The framework for VIA was set with the establishment of six key objectives:

- To build on the groundbreaking work of *The Commission on the Future of TCU*
- To more closely align strategic planning with budgeting cycles
- To identify short-range institutional priorities
- To fine tune the case for the fund-raising campaign
- To develop a long-range institutional worldview
- To create an active, ongoing university-wide planning process

Organization and Structure

Steering Committee

The Strategic Planning Steering Committee (SPSC) provided oversight and guidance for VIA throughout the project. Committee members evaluated the need for course corrections and made them, when warranted. They received an array of input from various sources and constituencies and successfully synthesized such input to provide strategic direction for TCU.

The SPSC has been co-chaired by then Professor and Charles B. Moncrief Chair of Geology (and current Provost and Vice Chancellor for Academic Affairs) R. Nowell Donovan and Associate Provost for Academic Support Leo Munson. SPSC members included:

- Carol Campbell, Vice Chancellor for Finance & Administration
- Bronson Davis, Vice Chancellor for University Advancement

- William H. Koehler, Provost and Vice Chancellor for Academic Affairs (retired May 2004)
- Larry Lauer, Vice Chancellor for Marketing & Communication
- Don Mills, Vice Chancellor for Student Affairs
- Cornell Thomas, Special Assistant to the Chancellor for Diversity
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Resource Groups

In addition to the SPSC, there were two staff committees—Economic Review and also Research and Data—that provided resource support during the discovery phase.

Economic Review Committee

Carol Campbell, Finance & Administration
 Jack Hesselbrock, Athletics
 Mike McCracken, College of Science & Engineering
 Ann Sewell, Academic Affairs
 Tammy Tanner, Financial Services
 Donna Traylor, Financial Analysis
 Cheryl Wilson, Financial Services

Research and Data Committee

Ray Brown, Admissions
 Emily Burgwyn, Student Affairs
 Susan Campbell, Institutional Research
 Ruben Chanlatte, Academic Affairs
 Gay Donohoo, University Advancement
 Jack Hessebrock, Athletics
 Pat Miller, Registrar, Chair
 Ann Sewell, Academic Affairs
 Mike Scott, Financial Aid
 Cheryl Wilson, Financial Services

Chapter I: Discovery and Analysis

I.1 Report Card on *Commission on the Future of TCU*

TCU launched *The Commission on the Future of TCU* in 1999 to chart a plan for the University's move to a higher level of distinction in American education. The work of *The Commission* was carried out by 17 strategic task forces that involved a total of 454 people, including alumni, friends, and various leaders from the community, corporations, and University. Concluding its work in 2000, *The Commission* generated 386 recommendations, which were then consolidated by Chancellor Michael Ferrari into four distinct areas: facilities, education, athletics, and community.

In Fall 2003, Chancellor Boschini requested a progress report on implementation of *The Commission's* recommendations. In January 2004, Provost-elect and VIA Steering Committee Co-Chair Nowell Donovan prepared and submitted a report to the Chancellor. This report showed that approximately 70% of the recommendations had been achieved or were proceeding, with planning in an advanced stage and a deadline for completion established (see Table I below).

Table I: Status of Recommendations from Report of the *Commission on the Future of TCU*

	Total	Achieved	Proceeding	Not Achieved	Not Relevant
Strategic Task Forces					
1. Undergraduate Experience	24	8	12	4	-
2. Graduate Education	25	11	5	9	-
3. Technology	45	24	7	14	-
4. Distinctive Programs and New Directions	19	8	4	7	-
5. Community and Strategic Alliances	17	3	2	12	-
6. Global Positioning and Priorities	42	19	6	17	-
7. The Role of Athletics	14	14	-	-	-
8. Alumni Relationships	39	19	20	-	-
College and School Task Forces					
	Total	Achieved	Proceeding	Not Achieved	Not Relevant
9. Adran College of Humanities & Social Sciences	17	8	2	5	2
10. College of Science & Engineering	20	7	3	10	-
11. College of Fine Arts	27	14	4	7	2
12. College of Communication	29	3	6	20	-
13. M.J. Neeley School of Business	14	10	1	3	-
14. School of Education	17	9	3	5	-
15. College of Health & Human Sciences	4	3	-	1	-
16. Brite Divinity School	23	-	22	1	-
17. Ranch Management	10	8	-	2	-
TOTALS	386	168	97	117	4
PERCENTAGES		43.6%	25.1%	30.3%	1%

Three areas with the highest concentration of “Achieved” (significant implementation accomplished) and “Proceeding” (advanced planning with timetable for implementation) are facilities, athletics, Core Curriculum, and the Neeley School of Business. The areas with the highest concentration of “Not Achieved” recommendations (not acted on) are targeting/enhancing current academic programs capable of achieving regional, national and international distinction and connections to the community.

A copy of the full Report Card is presented in [Appendix A](#).

I.2 Strategy Work Groups

The central focus of the Discovery/Analysis Phase was the work of six faculty-led Strategy Work Groups, each of which was charged with answering a set of questions related to understanding TCU’s current position and setting institutional strategy in key areas.

- Size, Mix and Residentiality
- TCU Experience
- Academic Directions
- Connections to Communities
- Strategies for Athletics
- Learning Resources/Technology

Each group had a faculty member designated as the Convenor, while a member of the Strategic Planning Steering Committee served as liaison to the SPSC for the group. The members of the six groups were:

Size, Mix and Residentiality

Karen Baker, Office of the Chancellor
Mike Butler, AddRan College of Humanities & Social Sciences
Mike Scott, Financial Aid
Molly Weinburgh, School of Education, *Convenor*
SPSC Liaison: **Leo Munson**, Associate Provost

TCU Experience

Larry Adams, Academic Affairs
Ralph Carter, AddRan College of Humanities & Social Sciences
Barbara Herman, Student Development
Jane Kucko, AddRan College of Humanities & Social Sciences, *Convenor*
SPSC Liaison: **Don Mills**, Vice Chancellor for Student Affairs

Academic Directions

Jeff Coffey, College of Science & Engineering, *Convenor*
Richard Gipson, College of Fine Arts
Rhonda Keen Payne, College of Health & Human Sciences
Dan Williams, AddRan College of Humanities and Social Sciences
SPSC Liaison: **Nowell Donovan**, Provost-Elect

Connections to Communities

Valerie Martinez-Ebers, AddRan College of Humanities & Social Sciences
Bob Seal, Mary Coats Burnett Library
Cornell Thomas, Special Assistant to Chancellor for Diversity and Community
Jennifer Watson, College of Health & Human Sciences, *Convenor*
SPSC Liaison: **Larry Lauer**, Vice Chancellor for Marketing and Communications

Strategies for Athletics

Davis Babb, Athletics/Advancement
Chris Sawyer, College of Communications
Bob Vigeland, M. J. Neeley School of Business, *Convenor*
Zoranna Williams, College of Health and Human Sciences
SPSC Liaison: **Bill Koehler**, Provost and Vice Chancellor for Academic Affairs

Learning Resources/Technology

Sue Anderson, School of Education
Earnest Couch, College of Science & Engineering
Larry Kitchens, Instructional Services
Catherine Wehlburg, Teaching Excellence
SPSC Liaison: **Cornell Thomas**, Office of the Chancellor

The groups were provided with written charges that included a series of critical questions to consider and a timeline for completing the work. The charge and critical questions for each group can be found in **Appendix B**.

There was no prescribed methodology for accomplishing this work, and each group developed its own approach for discovering and gathering information. Faculty, student, and staff involvement, however, was expected, and each group addressed that requirement using a variety of activities, including surveys, focus groups, and face-to-face meetings.

Perhaps the most important mechanism for ensuring broader participation was the Town Hall Meeting (THM). Between March and December 2004, each group conducted a THM over the lunch hour in the Brown-Lupton Student Center, where representatives from the Strategy Group and Steering Committee could hear, first hand, the thoughts, concerns, and suggestions of members of the TCU family. Participation in the THMs was strong (an estimated average of 300 people attended), and while some faces were recognizable from one meeting to the next, each topic brought out a discrete cohort of interested individuals.

By mid-June, the following Strategy Group reports had been posted on the VIA website for public review. The individual reports are found in:

- Appendix C **Size, Mix, and Residentiality** Strategic Work Report
- Appendix D **The TCU Undergraduate Experience** Strategic Work Report
- Appendix E **Academic Directions** Strategic Work Report
- Appendix F **Connections to Community** Strategic Work Report
- Appendix G **Strategies for Athletics** Strategic Work Report
- Appendix H **Learning Resources/Technology** Strategic Work Report

In addition, a synthesis of the six Strategic Work Reports can be found in [Appendix L](#).

I.3 Environmental Scan Conference

In late March 2004, more than 90 faculty, staff, students, trustees, and alumni attended an Environmental Scan Conference to discuss trends in society and higher education and their impact on TCU. Chancellor Boschini presented an overview of the deep strategy issues facing TCU, the desired outcomes of the VIA Planning process, the basic assumptions for planning, and the four stages of strategy development incorporated into VIA. Provost-elect Donovan followed with a brief presentation on TCU's competitive position with a comparison cohort in Tier II (as defined by *U.S. News and World Report* in its annual rankings of colleges and universities) of both private and public institutions. He then discussed some of the key issues related to competing successfully with Texas public institutions and concluded with a review of the expected outcomes of the VIA process. After receiving these two contextual overviews, the participants broke up into 5 small groups (competition, pricing, demographics/general economy, philanthropy, and technology) to discuss the impact of the Environmental Scan's findings and conclusions on TCU and to report back to the reassembled group. PowerPoint presentations made by the Chancellor, the Provost, and Kaludis Consulting, along with the summary document of the proceedings, can be found in [Appendix I](#).

I.4 Economic Scan Seminar

In mid-April 2004, an Economic Scan Seminar was held to review the essential elements and trends of the TCU economy. The seminar was designed for major administrative officers, including the deans, strategy group convenors, and University personnel responsible for budget and financial strategies. The four principal goals for the Seminar were to:

- Recognize the essential elements and trends of TCU's economy
- Link the University's finances to goals, strategies, and financial planning
- Discuss opportunities and options for optimizing the University economy
- Involve conference participants in increased understanding of the economy and financial strategies.

TCU's economic strength, challenges, and issues were presented to provide an enhanced understanding of the institution's economy and, more importantly, as an opportunity for the participants to engage in a dialogue for building financial goals into the University's planning activity.

The Seminar showed the University's economic strengths included:

- Moody's Aa3 Rating
- 2nd highest endowment among Tier II private universities
- Low undergraduate student aid discount rate and low student need
- Low tuition, fee, and auxiliary rates charged to students
- Fully funding depreciation in the operating budget

The discussion concluded with an understanding that capital use and its development is likely to drive future financial requirements and strategies. The University's economy, then, was viewed as requiring:

- Balancing financial position and strategy with current requirements and future plans
- Moving to a private university model
- Using a strategic pricing model
- Creation and management of critical capital
- Focus on the major change drivers

These issues were designed to carry through the full VIA discussion. The resources and conclusions of the Economic Review Seminar can be found in [Appendix J](#).

I.5 Campus Master Plan

In 1991 the TCU Board of Trustees developed a comprehensive Campus Master Plan. This plan was subsequently updated in March 1998, and in 1999 the Board of Trustees approved the update. In April 2004, TCU selected the Forth Worth firm of Freese and Nichols, Inc. to review and again update the Campus Master Plan with the overall goal of supporting TCU's strategic direction. The Campus Master Plan establishes a standard for continued development of a physically attractive and stimulating campus environment, which is crucial in attracting top faculty, staff, and students. The Campus Master Plan also provides a framework for the daily management and future development of TCU's physical facilities.

Campus Master Plan Committee

Carol Campbell, Vice Chancellor for Finance and Administration

Fred Oberkircher, AddRan

Chuck Williams, M. J. Neeley School of Business

Will Stallworth, Physical Plant

Brian Guterrez, Vice Chancellor for Finance and Administration (June 2005)

The 1999 update of the Campus Master Plan outlined six specific goals:

• Growth Management:

to accommodate change in an orderly, coherent and sensible manner, with flexibility to enable TCU to capitalize on currently unforeseen opportunities;

• Cohesiveness:

to sharpen the physical form, which promotes the unification and interdependence of the distinct areas of the campus so that first time visitors can understand the physical organization of TCU; and to develop a plan in which the physical campus expresses TCU's academic mission;

• Cost Effectiveness:

to recognize opportunities and limitations to the funding mechanisms for growth and change;

• Design Efficiency:

to enhance the appropriateness of land uses and facilities, and, conversely, to ensure the separation between conflicting uses; and to establish a development atmosphere appropriate to TCU's academic purpose;

• Aesthetics and Environmental Sensitivity:

to provide adequate areas of open space and preserve and enhance the aesthetic attributes of TCU;

• Relationships to the Community:

to relate gracefully to the urban and natural environments surrounding the campus.

The Campus Master Plan serves as a guide for future decision-making but does not set a time frame or schedule for planned improvements. The University's five-year plan implements master plan recommendations and establishes the priorities and time frame for necessary improvements. The five-year plan prioritizes requirements for the current budget year and four future years.

Conceptually the goals of the Campus Master Plan integrate closely with the relevant guiding principles developed by the Vision in Action Strategic Planning Project. This integration is particularly evident in "sustaining an environment in which rich personal interaction is enhanced by outstanding facilities and appropriate technology"; in "accelerating our connection with the greater community of Fort Worth"; and in "coupling wise financial stewardship with a well-planned entrepreneurial approach to academic opportunities."

The updated Campus Master Plan is currently under review by the TCU Board of Trustees.

I.6 Information Technology Plan

In May 2004, the Computing and Technology Committee (CATC) submitted the 2004 TCU Technology Planning Document, an annual update that identified six developmental/spending priorities: spamming, network security, technology funding, web content management, data warehousing, and wireless networking. The information from this planning document was reviewed in the context of the implications emerging from VIA concerning technology

development and investment, which could then be used to guide formulation of a TCU Information Technology Plan by the staff of Kaludis Consulting in October 2004.

Technology Infrastructure Group

Rich Baker, Student
Kerry Bouchard, Library
Emily R. Burgwyn, Student Affairs
Arthur B. Busbey, Science and Engineering
Ruben D. Chanlatte, Academic Affairs
Travis Cook Business Services
Gay Donohoo, University Advancement
Blake Eason, Student
Dave Edmondson, Information Services
C. David Grant, AddRan
Darryl Jackson, Student
Carrie Leverenz, Addran
James L. Mayne, Information Services
Andre P. Mazzoleni, Science and Engineering
William G. Powers, College of Communication
Kathy Smith, Residential Service
Mike TenEyck, Information Services
Stephen Weis, Science and Engineering
SPSC Liaison: **Leo Munson**

The following excerpt from the Information Technology Plan shows the connection between ongoing technology planning and VIA:

The reports of the VIA Strategy Groups suggest a number of potential strategies for the advancement of TCU, and they have significant implications for information technology planning, projects, resources, and support. They include a range of suggestions covering topics from implementation of quality standards in all aspects of the University to enhancing the living and learning environment of the institution. Further, these recommendations emphasize concern for the undergraduate student experience as well as for improvements in graduate programs.

The reports also stress the value of interdisciplinary and multidisciplinary programs and the importance of increasing intra-institutional collaboration and synergy (undergraduate/graduate; across units; Centers/Institutes). A significant outcome of the VIA process will be an integrated set of strategies across the University that optimizes the distribution and use of its resources.

A number of the objectives in TCU's IT planning document match VIA-defined institutional issues. Although the TCU technology planning document did not define strategies, it did present "Funding IT" as a major focus. CATC's IT issues reflect the strategic directions emanating from the VIA process, specifically:

- Create a method to coordinate technology budget development across the University;

- Apply digital information and technology to achieve improvements in efficiency and cost effectiveness of University business processes; and
- Design ways to redistribute or acquire additional resources for digital information and technology and to improve allocation of those resources.

The major recommendations in the TCU Information Technology Plan are:

- Create a more comprehensive definition and view of TCU's digital information and technology environment;
- Develop a new strategic digital information and technology plan and planning process;
- Create a means to coordinate TCU's IT and related functions within the context of an integrated digital information and technology plan.

The TCU Computing and Technology Committee's 2004 report and the Kaludis Consulting Information Technology Plan are presented in [Appendix K](#).