



STRATEGIC RENEWAL

Report on Strategic Planning

April 2021

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Message from the Provost and Vice-President, Academic (acting)

In early 2019, a comprehensive, engaging, and consultative process was initiated and led by Provost Teri Balsler to renew the University's strategic priorities. This process bridges from the University's previous strategic directions "*Inspiration and IMPACT*" which spanned the period from 2014 to 2018. The aim of the strategic renewal is to identify the elements that are fundamental to Dalhousie's future. The strategic renewal process was paused due to the onset of the COVID-19 pandemic in early 2020 and, given the latter's implications, the University took time to understand how the response to and impact of COVID-19 would influence Dalhousie's strategic outlook.

This paper describes the planning process and the emerging strategic themes and priorities that helped inform the final phase of our strategic plan development. This summary of the work to date includes the results from extensive consultations from many across the University. Special acknowledgement to Dr. Balsler, the self-study leads and their teams who are instrumental in bringing us to this point.

The President, other members of the executive team and I look forward to working with you in the next and final phase of strategic renewal for Dalhousie.

Frank Harvey
Provost and Vice-President (acting)

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1.0 BACKGROUND

1.1 Renewal of Dalhousie's Strategic Priorities

In January 2019, Dalhousie launched a four-phase strategic planning renewal process, building from the previous five-year Strategic Direction "*Inspiration and IMPACT*". This renewal process enabled inclusive participation across the University to help identify and make recommendations on critical strategic issues that will steer Dalhousie's future.

The strategic planning process has been guided by the following principles:

- Grassroots oriented and driven by a diversity of lived experience and interests
- Informed by broad-based expertise
- Goal-defined, versus path-defined
- Built on prior work (e.g. the "*Inspiration and IMPACT*" Strategic Direction)
- Driven by bold ideas and future-focused thinking
- Informed by lessons from the COVID-19 pandemic

1.2 Drawing from the Previous Strategic Directions "*Inspiration and IMPACT, 2014-2018*"

The starting point of renewing the University's strategic outlook was to ensure Dalhousie builds upon the momentum, goals, continued strategic initiatives and accomplishments of the previous plan while engaging in new consultation, identifying new opportunities and issues, and updating data and environmental scans for a refreshed perspective reflective of the time, place, issues and challenges of today.

Throughout this phase, recurrent strategic imperatives for Dalhousie included:

- a. A strong commitment to the University's core mission of excellence in teaching and learning as a foundational principle underpinning our strategic priorities
- b. Building on and reinforcing Dalhousie's status and important contributions as Atlantic Canada's leading research-intensive university, and among the highest ranked universities in Canada
- c. A continued and emphasized commitment to attracting talented and diverse perspectives to drive the region's intellectual, social and economic development

- d. Integrating equity, diversity, and inclusion across all facets of Dalhousie
- e. A deeper understanding of the relationship between student experience and student retention and success
- f. Expanding the number, scope and depth of Dalhousie's partnerships and relationships among donors, alumni, governments, universities, our community and many other stakeholders and partners

1.3 The Four Phased Strategic Renewal Process:

Three of the four-stage planning processes occurred between January 2019 and March 2020. These stages are summarized below. As the University was transitioning to the fourth and final phase, the uncertainty and immediate challenges of a global pandemic were top of mind. The planning process was paused, as President Deep Saini and the senior leadership team deemed it imprudent to be finalizing a five-year strategic plan until the impacts of the pandemic were more fully understood. The consequences and associated lessons learned from our response to COVID-19 can now be more fully integrated into Dalhousie's long-term strategic planning.

In recent months, in addition to absorbing and integrating the extensive feedback through consultations and the self-study papers, several common themes, insights, opportunities, and recommendations have been identified, all of which are being considered in the final phase of the strategic renewal process. As the Fall 2020 term commenced, and as responses to the pandemic were coordinated through the "Return to Campus" committee, President Saini asked the strategic planning team to re-engage the planning process.

The following sections outline the work completed through each phase, including some of the recommendations, cross-cutting themes, strategic insights, and preliminary lessons learned from COVID-19.

Phase I: Explore and Listen (January – May 2019)

A Provost listening survey (253 respondents) launched this initial phase. The themes identified through the survey included repeated references to excellence, sustainability, partnerships, infrastructure, affordability, Student experience and support, diversity, equity and inclusion, and opportunities for collaboration and interdisciplinary work.

Thirty-seven Provost-led engagement meetings took place across the University with participation from all Faculties and other units (over 600 faculty members and staff). There was considerable overlap with the Provost survey, with additional themes which included:

- Climate, culture, and diversity (embracing differences rather than assimilation)
- Being relevant and modern
- Long term sustainability (financially and environmentally)

Phase II, Learn and Grow (May – August 2019)

This phase launched with a Provost led retreat in May 2019 and involved 200 participants from across the University, garnering more than 900 participant comments relating to opportunities or issues highlighted as having strategic impact on the University's future, including:

- Focusing on Dalhousie's strengths
- Ensuring policies and processes support/enable the University's academic mission
- Prioritizing equity, diversity and inclusion (EDI) and health and wellbeing for faculty, staff and students
- Taking more risks - be bold and prepared to make mistakes
- Improving linkages between teaching & learning and research & innovation
- Clarify and highlight what Dalhousie should stop doing

The retreat concluded with an invitation to assemble over the summer 16 informal "learning circles" to explore the topics identified through the various consultations, surveys, and retreats held to date. The 16 topics included:

- Undergraduate Research and the Teaching-Research Nexus
- Fostering Interdisciplinary Research
- Fostering Innovation and Creativity
- Employability (Skills and Training)

- Experiential Learning, Service Learning, Work-Integrated Learning
- Fostering Student Success
- The 4th Industrial Revolution
- The Future of Teaching and Learning
- Workplace Wellness and Campus Climate
- Attracting and Retaining Faculty and Staff
- Diversity
- Internationalization and Global Engagement
- Solving Global Challenges
- Staff Engagement and Support
- Universities and Sustainability
- Data Governance

Phase III: Self Study (September 2019 – March 2020)

This third phase launched in September 2019 with a planning retreat involving 150+ individuals. The retreat included presentations from 11 of the learning circle teams. Building on the work completed through the first two planning phases and the September 2019 retreat, eight strategic themes emerged that set the stage for detailed examination by self-study teams. The eight emerging strategic themes were:

1. The Future of Teaching & Learning
2. Research Future
3. Student Experience and Student Success
4. Campus Health and Wellbeing
5. Culture and Climate
6. Dal Purpose & Social Responsibility
7. Internationalization and Global Engagement
8. Sustainability and Environmental Responsibility

A team for each emerging strategic theme was assembled. Each self-study team was co-led by a faculty member and a staff member with team members from across the University, supported by subject-matter experts and executive champions (VPs). More than 150 Dalhousie faculty, staff, and students were self-study team members. Each team developed a thought paper for their respective theme, informed by cross-university consultation, evidence-based research and expert input.

Phase IV: Finalize (March 2020 – April 2021)

The final phase of the strategic renewal involved sharing the eight thought papers (and extensive feedback from phases I and II) with Dalhousie's President and senior leadership team to help inform decisions on strategic priorities for the next planning cycle. These contributions will be added to the lessons learned from our response to COVID-19 to complete the final stage of Dalhousie's strategic planning process.

2.0 RECOMMENDATIONS FROM SELF-STUDY THOUGHT PAPERS

Each self-study thought paper included reflection on values, observations, research findings, lived experiences and responses received during the consultation process. The key objective of these self-study groups was to help inform the strategic themes and priorities for the University's strategic plan.

Strategic and operational recommendations have been derived from the thought papers and are summarized below. The operational recommendations/tactics will eventually link to confirmed strategic priorities as part of the implementation plan.

2.1 Strategic Recommendations from the Self-Study Papers:

- Establish and foster a **culture of care** for all members of the Dalhousie community - physical, mental, and social structures, systems and policies need to be firmly rooted in a culture of care and connection and foster an environment of well-being. This can be a differentiator for Dalhousie.
- Increase and sustain commitments to **equity, diversity, and inclusion**.
- Embrace leadership opportunities to build **partnerships** within the local and regional community.
- Move to more flexible **teaching and learning**. Dalhousie can be a leader in delivery of online, multi-access, or blended learning courses at both undergraduate and graduate levels. Experiential education and universal design for learning must also be included.
- Explore and clarify **Dalhousie's definition of international** (Aspire and realize Dalhousie as "an international community on Canada's East Coast").
- Define, continue to build, foster, and sustain a **research culture** at Dalhousie (Grow and reallocate resources over the next 5 to 10 years to attain an institutional investment in research that is comparable to other U-15 Universities.)

- Re-think / clarify Dalhousie’s definition of **student success**.
- Position Dal as a model for **environmental sustainability**.

3.0 LESSONS FROM THE COVID-19 PANDEMIC

The COVID-19 pandemic has opened possibilities not previously conceived. The disruptive nature of the pandemic will influence strategic priorities and opportunities. How the University addresses the challenges of a global pandemic illustrates the possibilities of transformational change and strategic opportunity as we take a longer view of the University’s future. Lessons from the pandemic are outlined below and includes input from Dalhousie’s senior leadership retreat in October 2020. These include:



The power of collaboration and engagement



Rethink use of our physical environment across campuses



Pursuit of new approaches to teaching, learning and student experience



Emerging research in response to the pandemic



New approaches to how we work



Greater focus on addressing equality and inclusion

Additional lessons from our COVID-19 experience that will help inform our strategic priorities and the implementation plan include:

Enhance what we have: Before expanding courses and programs, work to adapt and strengthen what we already have.

Blended Model: Develop blended learning models; expand our student recruitment base; expand reach to non-traditional learners (e.g. lifelong learning).

The Truro Campus of Dalhousie University: Fully leverage the opportunities and benefits of the small, rural Truro Campus (The Dalhousie Agricultural Campus) to widen and diversify student access to Dalhousie through cross-Faculty programming and synergies. This includes strengthened academic access and offerings to the surrounding indigenous communities.

Student Experience: Find ways to enhance student experience and build student communities based on shared interests. There is a need for more effective and richer in-person experiences that complement online learning.

Workload: Re-examine workload for faculty and staff as online learning and working has radically altered the nature of work. Ensure that “community of co-workers” and in person experiences are not diluted or lost because of the changes in the nature of how we do our work (including the accommodation for service workload for equity-deserving individuals, groups and caucuses).

Community: Examine what our community connections (local to global) will look like and identify ways to strengthen in meaningful and equitable ways.

Research: Dalhousie’s research-intensive status is a central piece of on-campus experience. Let us stay the course on reactivating research on our campuses and revisit this in the spring 2021.

Invest in Technology: Our success will also depend on the quality of online experiences. Be selective and consistent in technology choices we make. To this end, Dalhousie has formed a Digital Strategy committee to develop the requisite enabling digital infrastructure and foundational principles to support the new strategic plan and related priorities.

4.0 NEXT STEPS

Renewing the University’s strategic outlook began with a commitment to build upon the momentum, goals, initiatives and accomplishments of the previous plan, *“Inspiration and IMPACT: Dalhousie Strategic Direction 2014-18”*. The four-phase, iterative strategic planning process launched with an approach that sought inclusive participation across the University to help identify opportunities and issues considered vital to the University’s future. Updated data and environmental scans also informed the process. The iterative planning process documented and shared ideas to inform subsequent planning phases. Each of the four interconnected phases provided opportunities to listen and learn; spaces for idea generation and authentic conversation; and was supported by coordinated data collection, synthesis and reporting out.

Emerging from this planning process will be Dalhousie's renewed strategic plan/direction which is reflective of time, place, issues and opportunities of today in addition to the recurrent strategic imperatives that bridge from our previous strategic plan including:

- A commitment to the University's core mission of excellence in teaching and learning which underpins our strategic priorities
- Building on and reinforcing Dalhousie's important contributions as a research-intensive university, and among the highest ranked universities in Canada
- A continued commitment to attracting talented and diverse perspectives to drive the region's intellectual, social and economic development
- Integrating equity, diversity, and inclusion across all facets of Dalhousie and its priorities
- Gaining deeper understanding of the relationship between student experience, retention and success
- Expanding the number, scope and impact of Dalhousie's partnerships and relationships among donors, alumni, governments, universities, our community and many other stakeholders and partners

Building on this work, the final phase of our strategic planning process involves further engagement with deans, VPs, AVPs and other senior leaders to confirm core areas of strategic importance and related priorities. Following presentation of the plan to and approval by Dalhousie's Board of Governors, we begin the collective effort of detailing the initiatives with measures to monitor progress, impact and outcomes through a comprehensive implementation plan.

Update - after this report was finalized, the Strategic Plan was reviewed by Dalhousie leadership, Senate and approved by the Board of Governors on April 20, 2021.