

EXCELLENCE. ENGAGEMENT. ENLIGHTENMENT.
A FRAMEWORK FOR ACADIA UNIVERSITY'S
STRATEGIC PLAN – ACADIA 2025

SETTING THE STAGE

Acadia University is ready for the next stage in its future. Today, it is a renowned university that personifies the very essence of a liberal education for the 21st century society and economy. Acadia not only fulfills the core mandate of universities around the world, namely to preserve and create knowledge through research and teaching, but also delivers on that mandate within a stimulating and enriched learning environment that creates a unique educational experience for its students. That unique experience combines high quality teaching with the engagement of undergraduate and graduate students in research, experiential learning, community service, and environmental stewardship, at an historic residential campus set in a region boasting outstanding natural beauty and a high quality of life.

Acadia is a “jewel in the crown” of the Canadian university system. With strength in the core disciplines of the humanities, performing arts, social sciences, and sciences, Acadia has also developed distinctive professional and interdisciplinary programs in fields as varied as education, kinesiology, business, engineering, community development, and environmental and sustainability studies. The words “excellence”, “engagement, and “enlightenment” come to mind as defining what the Acadia educational experience is all about.

After a period of enrolment decline, Acadia is again growing in size and in reach. From 2015 to 2017, total enrolment grew by 4.4 percent and international enrolment by 12.5 percent. As of December 2017, Acadia had 3,777 FTE students, 39.7 percent of whom come from within Canada outside Nova Scotia and 12.5

percent from 59 other countries around the world. This recent growth owes much to the commitment of faculty and staff, as well as students and alumni who do so much to promote Acadia. As we plan our future course, our people are our most important and valued resource.

STRATEGY AND STRATEGIC PLANNING

This document is intended as a framework for the development of an integrated and comprehensive Acadia University Strategic Plan for 2019-2024. It reflects on Acadia's current strengths and on the environment in which the University will move forward, setting the scene at a high level for formulating goals, establishing priorities, and measuring impact including goals that ensure future financial stability.

Acadia University has not had a recent history of strategic planning at the institutional level, with the last Strategic Plan, entitled *Personalized Education for a Complex World*, dating from 2006. Also, a Strategic Research Plan entitled *Rural and Coastal: Local to Global*, was adopted in 2015 by Senate, building upon previous plans developed as a requirement for federal research funding.

That is not to say that Acadia has not been managed strategically, but simply to recognize that shortly after the adoption of the last Strategic Plan, the University was plunged into a financial crisis as a result of reduced enrolment and changes to the funding formula which took \$6.4 million out of its annual operating grant. The combined impact pushed Acadia into survival mode and an overriding strategic focus on restoring fiscal sustainability. In addition to making major cuts in operating expenditures, Acadia simultaneously pursued three goals: 1) recovering lost provincial grant funding; 2) increasing operating revenues from tuition and other fees by reversing the decline in enrolments; and 3) increasing external revenues from fundraising.

On the first goal, an urgent request for an increased provincial grant of \$7 million was answered initially with a loan, even though Acadia was clear at the time that it could not foresee ever being able to repay it. While providing short-term relief, this one-time loan did not address the ongoing impacts of the funding cuts and simply exacerbated an already acute financial problem by adding a significant amount of additional debt. In subsequent years, the Government of Nova Scotia responded with an additional \$3.5 million annually to Acadia's provincial operating grant. At the same time, Acadia took stringent measures to reduce annual expenditures to the tune of approximately \$3.5 million. In the summer of 2017, after a lengthy and concerted effort by the Board and senior administration, the Nova Scotia government agreed to forgive the \$7 million loan and incorporated the annual \$3.5 million payment into the University's ongoing operating grant. These financial adjustments by the provincial government have brought a level of fiscal stability to Acadia, albeit at a significantly lower level than would have been the case without the 2008 changes in the funding formula.

On the second goal, Acadia embarked upon a major re-branding and marketing strategy to increase student enrolments, as well as investing scarce resources into recruitment and student support services. Although it took some time to deliver, this strategy has been remarkably successful, and paid dividends when in 2016, after a period of enrolment decline, Acadia benefited from a 25 percent increase in its first-year intake over the previous year, which was then maintained in 2017. The results of this approach are responsible for the healthy enrolment figures mentioned above.

The third goal involved a reinvestment in Advancement and building our *alumni* relations. As a result, revenue from giving has increased significantly from \$2.9 million in calendar 2012 to an annual average of approximately \$7.7 million for the 2013-2017 period, an increase of over 160% since 2012 and with a value equivalent of almost 500 students. Although most of the fundraising revenue goes to donor designated accounts such as student scholarships or capital projects and not to the

annual bottom line, the implications for recruitment, academic programmes and deferred maintenance are significant, and the Advancement rebuild has been an important element of the improving financial situation.

This three-pronged strategy has placed Acadia in a position where we can now put our minds to a longer-term strategy to chart our course for the next five or so years. As we do that, it is important to have an understanding of the environment in which we currently exist:

- The MOU between NS universities and the provincial government ends at the end of March 2019, and negotiations on a new MOU have begun; NS universities will be asking for an increase in the annual escalator beyond the current 1 percent.
- As the Government of NS is committed to a balanced budget, it is highly unlikely that it will increase; it is likely that the current annual increase of 1 percent to the operating grants will continue into the next MOU.
- If the Government posts surpluses, one-time money may be available for specific projects such as deferred maintenance, IT renewal, and other infrastructure funding; this may occur in the current fiscal year.
- The Federal Government may be in a position to announce another infrastructure initiative in 2018.
- There are ever-louder calls for universities to be accountable for graduating students that are fully prepared for entering the world of work in the 21st century economy and for spending public funds and the funds from student tuition in an efficient and effective manner.
- Collaboration between universities and colleges, and between universities themselves, is seen as increasingly necessary to provide the diverse pathways and unique program areas that are relevant to the modern economy; as well, collaboration to increase service and cost efficiencies is viewed as important by government and society.

- All Canadian universities are being challenged to respond with actions to the recommendations of the Truth and Reconciliation Commission; Acadia is working on its responses through the Presidential Advisory Council on Decolonisation which has now delivered its initial report.
- Governments are increasingly concerned that universities be strong net contributors to the provincial economy, and especially in implementing the Atlantic Growth Strategy, as well as incubators for economic growth and social development within their respective regions; for over 30 years, Acadia has demonstrated significant strength in supporting innovation, entrepreneurship, and the expansion of business and industry in the region of Wolfville, Kings County, and the Annapolis Valley, including such important economic growth areas as tidal energy, wine, agriculture and agri-food, tourism and hospitality, IT, and sustainable resources, as well as critical areas of community development, health and welfare, education, music and performing arts, sport, fitness and wellness; all of which contribute to making the region one of the most attractive areas to live and work in the province, if not Canada.
- Universities are major players in promoting immigration to NS, both in terms of direct employment in high paying jobs, providing a rich pool of highly qualified personnel (HQP) for industry, business, government, and other employers, creating new R&D capacity, attracting new students from across Canada (up by 10.4% since 2010-11), and attracting international students to NS from around the world (up by 50.3% since 2010-11).
- A recent (2017) study on the export value of universities by Gardner Pinfold reports that NS universities constitute the third largest export revenue sector in the province, behind tire manufacturing and seafood products preparation and production (and ahead of fishing, pulp, paper, and forestry products); that the combined annual value of student and research exports is \$886 million (up by \$50 million since 2012); and that NS universities attract over \$184 million in research funding from outside the province.

- Recruiting for out-of-province students is becoming increasingly competitive as the domestic 18 to 25 year-old cohort continues to decline, especially in Atlantic Canada, and as other provinces provide increasingly attractive financial incentives for students to study within their home province; the most recent being Ontario, which is Acadia's largest source for out-of-province recruitment.
- Recruitment for international students is also increasingly competitive, as all Canadian universities seek to increase international student enrolment to offset domestic enrolment declines and provincial funding restrictions.

In earlier times, Acadia gained a reputation for big, bold strategic initiatives with the adoption of the Acadia Advantage in 1996. This boosted Acadia's reputation and status within Canada and beyond, and had an enormous impact upon the university. In many ways, the initiative defined Acadia for the next ten years, and still has resonance.

A question to consider: Is there another big, bold institutional-level initiative that could be a defining moment for Acadia and promoting the Acadia brand?

Finally, we must think about how Acadia University fits in and excels within the spectrum of post-secondary institutions in Nova Scotia, and in the Maritimes more broadly. Acadia has a unique role within the NS university system, not only in terms of our geographic location but also in the learning environment that we provide to our students. This is molded by our unique history, founded by Baptists with a mission to provide education regardless of race, creed, or religion; by the ambiance of our extraordinarily beautiful campus and buildings; by the commitment of our professors and staff to our students; by the partnerships with the town of Wolfville and the surrounding communities; by the passion, dedication and financial support of our alumni and donors; and by the students that we attract who are looking for a personalised, high quality, residential learning experience that is highly relevant to

the economy and society of the 21st century. This role propelled us to be involved in the creation of the Maple League of Universities, with the purpose of marketing and promoting the undergraduate, residential, liberal education and learning environment that each of the four member institutions provide; and that has become so rare in Canada as formerly small, undergraduate-focused universities have expanded in size and outgrown their ability to deliver that kind of learning experience.

COLLABORATING FOR THE FUTURE

This Strategic Planning Framework attempts to create a common understanding of how we will work together to chart the course for Acadia's immediate future, knowing that it will greatly influence the long-term future of our University.

Our strategic plan must be both aspirational and realistic, containing goals that lead us forward to realizing our vision and mission as a university, that reflect our institutional values, and that are accompanied by actions that are tangible and measurable. Our strategic planning process must start from the position that we are distinctive and have strengths that support our aspirations for development over the next five years. It must be developed by considering Acadia's strengths and the risks and constraints that we face; and how we can identify the strategic opportunities that can take us forward. This process must be highly consultative, involving and engaging the Acadia community and the community beyond our campus.

Universities have many similarities, but by their nature are each unique institutions. They are simultaneously based on models of individual achievement and collaboration. They are both collegial and hierarchical. They combine centralized and decentralized ways of doing things. Acadia is no different. Our faculty rely on peer evaluation of their individual achievements, often by others outside the institution, and are typically assessed on their individual performances as teachers

and scholars or their individual contributions to collective efforts. We are all engaged in some form of collective action as we undertake scholarly activities that are increasingly interdisciplinary; as we work together to improve our delivery of services and supports to the campus community; as we work with students to improve their ability to succeed academically and as engaged citizens of the world; as we engage with external communities to solve problems, provide real-world learning experiences for our students, and ensure that our academic programs are up-to-date and relevant to the society into which our students will graduate; as we develop our university and make the world a better place.

Collegiality and community are often identified as key characteristics of Acadia, and the term “family” is commonly used to describe the nature of our campus community. Do these characteristics actually define our uniqueness? University strategic plans are criticized for being much of the same regardless of the institution; that they dwell too much on what makes us all alike rather than what makes each of us distinctive.

A question to consider: How can we ensure that Acadia’s strategic plan will actually define what distinguishes us from other universities, and that it will lay out a roadmap for building upon those distinctive characteristics?

We also live with the necessary reality of centralized priority-setting and decision-making for the institution as a whole, often in anticipation of our responses to external realities. As governments and society at large place greater expectations and accountabilities upon universities and how we spend public money, we become increasingly driven by external forces from which we were sheltered in the past. Stringent financial constraints continue to restrict what we can do, and central control of the allocation of resources has been necessary to ensure that expenditures have been reduced and revenues increased in order to generate balanced budgets and a sustainable financial environment.

Most academic and many administrative units in the university have developed their own ways of doing things over time. Indeed, many of our academic and administrative initiatives are based on the premise that grass-roots initiation and support are essential for success. We also have centralized plans and processes which are normally intended to support what we do throughout the institution, but sometimes there is a creative tension between the central and the dispersed.

Another source of tension is generated by the increasingly interconnected ways of conducting our business, whether it be through the increased interdisciplinarity and multi-disciplinarity of academic programs and research, or the necessity to reduce unnecessary duplication and eliminate barriers and red-tape in the delivery of services. The clashes between the silos created by traditional ways of doing things and the need to cut across artificial divides are real, and especially so in universities where academic and administrative autonomy has created highly decentralized procedures and decision-making.

Strategic plans can often exacerbate these tensions, especially if they are developed in a non-consultative manner and if they are seen merely as tools of forcing top-down administrative directives upon the rest of the university community. Strategic plans are collective because they are developed for the institution as a whole, and by their very nature, they are not all-encompassing (they are, after all, “strategic” plans) – they must be strategic in identifying priorities and directions for the development of the institution. Strategic plans need to provide a level of coherence to the otherwise confusing state of activities that occur within an institution, so that both internal and external communities can understand why decisions are being made and how the allocation of precious resources is being directed. In order to be successful, a strategic plan must provide a bridge between the aspirations and ideas of the various components of the university community and the overall needs of the institutional as a whole. A strategic plan needs to provide the mechanism by which “bottom-up” meets “top-down”, and it must also identify where areas of traction exist between grass-roots aspirations and institutional aspirations. In short,

successful strategic plans provide for a university community to identify where grass-roots and institutional aspirations connect.

Therefore, strategic plans must be truly consultative in how they are developed, so that all members of the community feel welcome and encouraged to participate, where as many people as possible feel actively engaged in the process, and where a strong level of buy-in across the institution is generated.

Understanding this leads to an important conclusion about how we will be successful. Success will require leadership and guidance from all parts of Acadia University. The collaborative and consultative process by which we develop this plan will be an important demonstration to both internal and external audiences that there is a strong collective interest in creating the best future possible for Acadia. As members of the Acadia community, we will collaborate within and with others to make our university ever stronger in reality and in reputation.

INSTITUTIONAL VISION, VALUES, AND MISSION

Typically, strategic plans begin with a clear articulation of the mission and vision of the institution. In order to plan strategically, we need to be fully cognizant of what our university is all about and what we believe as a university community. The 2006 Strategic Plan included statements on the vision, values, and mission of Acadia (see Appendix A). As the plan states, Acadia's vision describes the scholarly community it wants to create. Its values provide the foundation from which the University community pursues that vision. Its mission follows from its vision and values.

The 2006 Acadia Strategic Plan provided the following statement as a renewed understanding of the mission of the University:

The mission of Acadia University is to provide a personalized and rigorous liberal education; promote a robust and respectful scholarly community; and inspire a diversity of students to become critical

thinkers, lifelong learners, engaged citizens, and responsible global leaders.

The plan also expanded on the mission statement by identifying five distinguishing features of a distinctive Acadia education (see Appendix B for detailed description of each):

1. Personalized attention to students as learners
2. Undergraduate research
3. Education of the whole student
4. A focus on the environment and important social issues
5. Emphasis on responsible, global citizenship

A question to consider: Does the 2006 mission statement, with its five features, still define the unique experience that is the Acadia education in 2017?

Our strategic planning process needs to answer this question, yet Acadia is well-positioned here because the more recent branding exercise directly addressed the unique characteristics of the Acadia educational experience, and in 2013 Acadia's Senate gave a lot of thought to the notion of what constitutes the Acadia education experience and again more recently in the "Big Picture Discussion" of 2015-16 .

An Acadia Education

In April 2013 the Senate of Acadia University supported a motion from the Academic Planning Committee (APC) for the endorsement of a renewed articulation of "An Acadia Education" as a planning goal. While the APC found that the Mission remains relevant, compelling and current, the APC also concluded that it needed to explicitly identify the key components of an Acadia Education, as these were considered to be at the heart of the APC's efforts. The APC felt that the best way to do this was through a re-statement and expansion of the existing description. Consequently, the APC offered a renewed articulation of an "Acadia Education" which was approved by Senate in April 2013:

A. An Acadia education:

1. Is rigorous and liberal and requires students to gain knowledge and understanding within and across disciplines.
2. Focuses on the whole student and fosters healthy academic, social, and residential experiences to develop well-rounded critical thinkers, engaged citizens, and lifelong learners.

B. To accomplish this, an Acadia education:

1. Is personalized in that students and faculty build close educational relationships that foster critical thinking, deep understanding, and attitudes of lifelong learning.
2. Encompasses a variety of curricular and extracurricular experiences that develop engagement with community and society on the principles of modern citizenship, ethical decision-making, and accountability.
3. Emphasizes the importance of understanding all facets of the environment.
4. Promotes students' participation in research and creative endeavours in order to enhance their critical thinking and analytical reasoning, and to foster their understanding of the importance of these activities.

Big Picture Discussion

The "Big Picture Discussion" reported to Senate in December 2015 focussed on two questions.

- What are the preeminent curriculum/academic program principles and priorities you want to see a future Acadia work toward and/or enact?
- Given our current strengths and resources, and given the current university context provincially and federally, how would you imagine operationalizing these principles and priorities? What supports /obstacles might you expect?

The Academic Planning Committee was directed by Senate to define emergent themes from that discussion, and subsequently identify principles based on the discussion and ensuing debate in Senate. The Senate approved the following principles be adopted by April 2016:

1. Senate reaffirms the definition of an Acadia Education, passed at Senate April 2013 (see above)
2. Acadia believes that opportunities for flexibility and choice in rigorous student learning within the liberal education framework should be enhanced.

3. Acadia continues to support the broader integration of the academic sector.
4. Acadia's educational environment promotes engagement, awareness of current societal issues including equity and diversity and critical analysis in our graduates as they enter the broader world.
5. Acadia believes in supporting community connections and engagement as part of the university experience.
6. Acadia believes in engaging our students with research.

The Acadia Brand

The branding and marketing exercise undertook a wholesale make-over of how Acadia communicates, and identified some key characteristics of how we present Acadia to the world and how we want the world to see us – see Appendix B. The branding exercise identified the Acadia reputation as being based upon the concept of exponential growth, meaning that the partnership between Acadia and its students results in a sum that is greater than its parts (the $1+1=3$ concept); a result that ensures our students are prepared for more than a career, they are prepared for a rich and rewarding life as thinkers, communicators, innovators, and individuals.

The branding exercise concluded that this partnership for exponential growth is what differentiates Acadia as an institution.

Reflection and Review

As the 2006 plan states, strategic planning provides an opportunity for the Acadia community to engage in an on-going process of reflection, review, and discussion to ensure that its vision, values, and mission continue to respond to changing times and needs. We need to meld together the 2006 statements with the branding exercise and the Senate discussions, and hold them up to broader examination and discussion in order to bring Acadia's mission and defining characteristics up to date.

A question to consider: How can we bring together the key elements of the branding exercise and the Senate deliberations on the Acadia education

experience and Big Picture discussions into a concise and coherent statement of Acadia's unique value proposition to Canadians and people from around the world?

MANDATE STATEMENT

Many universities are actively engaged in the development of mandate statements, often at the bequest or insistence of provincial governments. These mandate statements are typically part of the accountability process linked with the allocation of provincial operating grants, and address themes and issues identified by governments as being of importance to the economic and social development of the province, usually with a hefty bias towards the economic.

In Nova Scotia, the equivalent of a provincial mandate statement is the Outcomes Agreement incorporated within the Memorandum of Understanding (MOU) process that establishes an arrangement between the universities and the Government of Nova Scotia in exchange for the predictable allocation of operating grants and tuition fees over a multi-year (usually a three-year) period.

We need to review our Outcomes Agreement in terms of its relevance to the strategic planning process, and because it ends in March 2018 and will require renewal for the final year of the current MOU which expires in 2019.

In this Outcomes Agreement, Acadia identified four unique features that differentiate us from other NS universities:

- Focus on students and institutional quality
- Rural sustainability drives research priorities
- Community social responsibility
- Fiscal and environmental responsibility

These features, although developed specifically for a provincial government audience, are informed by the processes through which Acadia has assessed its

mission and uniqueness (such as the branding exercise and the Senate discussions described above) and by the Strategic Research Plan.

A question to consider: Do these features effectively characterize what makes us unique and do they define appropriately the specific mandate of Acadia as a university?

In other sectors, a mandate statement is typically something that is developed by the organization itself. Can we develop a mandate statement for Acadia that would be influenced but not controlled by our relationship with the provincial government? Having a mandate statement that sits between the mission statement and the strategic themes would provide a link that is often missing in university strategic plans. It could provide a clearer strategic direction to the development of the themes, goals and objectives of the plan.

STRATEGIC THEMES OR PILLARS

Strategic plans typically identify a number of strategic themes or pillars that relate to the mission of the institution. These themes provide the framework for the development of the goals and objectives of the plan, and link directly to strategic actions. Acadia's 2006 plan identified the following themes:

1. Learning and Teaching
2. Research
3. Building Community
4. Investing in People
5. The Environment
6. The Strategic Research Plan (SRP)

Acadia's Strategic Research Plan identifies four theme areas for research development under the overarching "rural and coastal" theme:

- Community Life , Organizations, and Cultural Diversity
- Natural Resources and Environmental Resilience
- Human Health and Wellness
- Innovative and Enabling Technologies.

Typical themes for university strategic plans are:

- Academic programs
- Research and Innovation
- Teaching and Learning
- People
 - Faculty
 - Staff
 - Students
- Campus Infrastructure
- Community partnerships
- Internationalisation and/or Globalisation
- Equity, Diversity, Accessibility, and Inclusiveness
- Indigenous Engagement and Outreach
- Advancement and Alumni
- Sustainability
- Interdisciplinarity
- Financial Stability
- Social Responsibility
- Health and Wellness
- Organisational Excellence

Some strategic plans have numerous themes while others focus on a few specific themes. The tendency to have many themes is driven by a desire to be comprehensive, and to not leave anyone or anything out of the plan. This often results in plans that are strategic in name rather than in content and direction. A small number of themes result from a determination to be strategic, meaning that not everything that the university does has to be incorporated into the plan, and that by its very nature, a strategic plan is not all encompassing. This can lead to a plan that is seen as exclusive and corporate in nature, and risks a lack of community engagement by those who do not “see themselves” in the plan. In a university setting, getting the right balance between these two is an important part of a successful strategic planning process.

Some examples of the number and type of themes - see Appendix C for details:

- UBC: Nine commitments (another word for themes or pillars) with goals and actions
- Wilfrid Laurier: Three themes

- Calgary: Three commitments and two cross-cutting themes
- Waterloo: Eight themes – five Foundational and three Distinguishing
- Trent: Four themes
- St. FX: Four pillars
- Carleton: Four themes

Regardless of the number of themes chosen, each theme is accompanied by one or more goals, each goal has a number of objectives that are designed to achieve the goal, and each objective has a number of actions which are the means by which each objective is achieved. These means should be measurable, but many plans fall short on this aspect. They have statements that are aspirational and full of good intent, but they simply cannot be measured in terms of achievements and progress. Of course, some things are easier to measure than others, but a strategic plan should have very clear ways to measure how progress towards meeting the goals.

STRATEGIC PLANNING PROCESS

Developing the strategic plan must be consultative and inclusive. It should comprise a series of phases beginning with fairly open consultation at university-wide level, and becoming progressively more focused leading to the production of a Draft Strategic Plan, and then a Final Plan that would go for approval at Senate and the Board.

For Acadia, the proposed process could be as follows:

Phase I - Ideas for Acadia 2025: We would invite members of the community to participate in an open consultation to think about what we want Acadia to be in 2025, which would be the year after the completion of a five-year strategic plan (2019-24). This university-wide level consultation would invite the community to comment on the vision, values, mission statements, strengths, challenges, and opportunities; and solicit ideas about the future direction of the University.

The method of consultation would be through the dissemination of a Strategic Discussion Paper and the establishment of an interactive Strategic Planning website with an *Ideas* submission section. The Discussion Paper would set out some broad themes (based upon our key challenges and opportunities) for soliciting ideas but also encourage the community to think creatively and generate ideas that are not necessarily related to a specific theme. While we would encourage the community to think about big ideas that would impact the University over the course of the next five years or more, all ideas (big or small) would be welcome.

In addition, members of the Acadia community could be asked to identify key words that define Acadia to them, and a Word Cloud could be developed showing how we think about ourselves. The words “excellence”, “engagement”, and “enlightenment” mentioned at the beginning of this document may be fine words, but perhaps there are other words that more accurately describe and define Acadia. It might also be interesting to conduct a Word Cloud exercise with some selected external groups to see how we are viewed by the outside communities that we serve.

A series of Town Hall sessions with faculty, staff, and students, together with sessions at Senate and the Board, could be used to present the Discussion Paper and stimulate and solicit ideas for the future. Members of the Acadia community would be asked to submit comments about the vision, values, and mission of the university, their ideas for making Acadia stronger and better, and their words defining Acadia through the web site.

An *Acadia Ideabook* would be developed based upon the submissions, with feedback and suggestions on the vision, values, and mission statements, ideas as suggested by the community, and the identification of emerging themes.

Phase II – Strategic Directions: A Strategic Planning Task Force (SPTF) comprised of faculty, staff, administration, and students appointed by the President would conduct a more focused phase of consultation based upon the *Acadia Ideabook*. A

series of Acadia Circle (A-Circle) groups could be created to address emerging themes, and start identifying potential goals, objectives, and strategic actions. Some A-Circles could be established by the SPTF and others could be initiated by groups or individuals. In order to foster broad and open thinking and dialogue, each A-Circle should comprise a reasonable balance of faculty, staff, students, and administrators, and have gender and ethnic diversity.

We might also consider establishing a small number of external Circles (e-Circles) to engage selected external communities in the strategic planning process. This might be done in Phase II or later in Phase III once we have a draft Strategic Directions document developed.

The SPTF would receive the reports from the Circles, and develop a draft Strategic Directions document. This document would outline the proposed themes of the strategic plan and would be published for consideration by the Acadia community. Feedback would be received from a variety of meetings and submissions to the website. The President's Office would also seek external comment and feedback on the Strategic Directions document.

Phase III - Draft Strategic Plan: The (SPTF) would conduct a more focused phase of consultation based upon the *Strategic Directions* document. Consultations at the departmental and unit level, as well as continuing feedback from the Circles, would address the prioritization of strategic directions, themes, goals, objectives, and actions resulting in the production of a Draft Strategic Plan. The Draft plan would be submitted to the President for review, and then published for consideration by the Acadia community. Senior administrators (VPs, AVPs, Deans, and Directors) would hold meetings to solicit feedback on the draft plan. Senate and Board would also be consulted on the Draft Plan. Based upon this feedback, the SPTF would review and rework the draft to create a Final Draft version for submission to the President.

Phase IV - The Final Strategic Plan: After review by the President, the Final Draft Strategic Plan would be brought for formal discussion at the Senate, Board, Faculties, and administrative areas for feedback into the development of the Final Plan. The SPTF would then finalise the plan, and submit the Final Strategic Plan to the President. The President would then present the Final Strategic Plan for approval by Senate and then the Board.

Phase V – Implementation and Accountability: After approval, the entire Acadia community will be engaged in implementing the plan, and the President will be responsible for reporting on progress to the Board, Senate and the Acadia community on a regular basis and at least annually.

Strategic Planning Process Timeline:

Official Launch: March 14, 2018

Phase I - *Ideas for Acadia:* March – June 2018

Phase II - *Strategic Directions:* July – December 2018

Phase III – *Drafting the Strategic Plan:* January 2018 – April 2019

Phase IV - *Finalizing the Strategic Plan:* April - June 2019

Phase V - *Implementation and Accountability:* July 2019 – June 2025

APPENDIX A

Excerpt from Acadia's 2016 Strategic Plan: Personalized Education for a Complex World

Vision, Values, and Mission

Strategic planning provides an opportunity for the Acadia community to engage in an on-going process of reflection, review, and discussion to ensure that its vision, values, and mission continue to respond to changing times and needs.

Acadia's vision describes the scholarly community it wants to create. Its values provide the foundation from which the University community pursues that vision. Its mission follows from its vision and values.

Vision

The core vision of Acadia University is to provide balanced, rigorous, distinguished, and purposeful academic and co-curricular programmes that ensure a personalized liberal education for undergraduate and graduate students that prepares them to become leaders in a complex world.

Acadia strives to achieve excellence in teaching, research, scholarship, services, and community engagement and to use all of its resources responsibly when implementing programmes that educate the whole student – mind, body, and spirit, inside and outside the classroom. Acadia seeks to enroll well-prepared students, invest in outstanding faculty and staff, and maintain strong relationships with committed alumni, all of whom are encouraged to participate in the full range of the intellectual and cultural life of the campus community. Acadia aspires to create a deep appreciation of our natural environment and an active commitment to sustainability among all members of the campus community. The University community also aspires to prepare students to understand and address complex social questions and concerns.

Acadia will continue to provide a distinctive technology-rich educational environment in support of academic programmes, information management, and student life.

To enrich the campus community, Acadia seeks students, faculty, and staff from a diversity of backgrounds, and works to ensure equal access to an Acadia education.

Values

We at Acadia believe in the primacy of the following overarching values: *Excellence in Scholarship, A Close Community, and Personal Responsibility and Leadership.*

Acadia values:

Excellence in Scholarship

- excellence in teaching.
- excellence in research.

- the development of **distinguished academic programmes**.
- **rigour and flexibility in learning**.
- the **strength of academic disciplines**. In addition to their own merits, strong disciplines provide the scholarly foundation to respond to and participate in the complex interdisciplinary issues and questions that are raised in today's society
- the **integration of research and teaching**. The University community values such integration in the delivery of the curriculum and in the construction of a distinctive personalized education.
- the **innovative use of technology**. Acadia continues to be unique in supporting academic programmes with leading-edge information technology.
- **a distinguished history and unique academic heritage**.

A Close Community

- **close engagement between students and members of the faculty**.
- **a distinguished and diverse faculty**.
- **members of the staff**, who are **full contributing partners** in the University community
- **committed alumni and strong traditions**.
- the **education of the whole student, including mind, body, and spirit**. The University community embraces this commitment and uses all of its resources in support of it.
- **sound and accessible academic advising** and learning support services for Acadia's students.
- **a healthy, safe campus community**.
- **engagement with the community**. Acadia's students, faculty, and staff recognize the importance of including the community in planning and of working in partnership with the community to address common problems.
- **cultural awareness, the celebration of diversity, affirmation of human differences, and our common humanity**.

Personal Responsibility and Leadership

- a strong, consistent sense of **social consciousness, responsibility, equity, and ethics**. Acadia's students, faculty, and staff hold themselves to high standards of personal and academic conduct.
- **the protection and sustainability of the environment**.
- **a democratic and civil campus community** where contrasting views are heard and respected.
- **accountability in the use and allocation of its resources**
- **social entrepreneurship and leadership**. Acadia encourages students to seek opportunities for thoughtful innovation and to explore new hypotheses and ways of solving problems.
- a **global perspective**. Acadia supports international programmes and recognizes the importance of preparing students to live and work in a diverse global community.

Mission

The following statement offers a renewed understanding of the mission of the University:

The mission of Acadia University is to provide a personalized and rigorous liberal education; promote a robust and respectful scholarly community; and inspire a diversity of students to become critical thinkers, lifelong learners, engaged citizens, and responsible global leaders.

An Acadia Education

Acadia's history and heritage, current practice, and future design are to provide a rigorous, distinctive *Acadia education*. Five distinguishing features of an Acadia education are:

1. **Personalized attention to students as learners:** The focus of an Acadia education is on the learner. The size of the campus community, the faculty's focus on developing close educational relationships with students, and integration of learning opportunities throughout the University and community support Acadia's ability to provide this personalized education. Acadia provides academic advising and a learning environment in which information technology connects faculty and students in a unique way. Acadia also provides specific learning support systems and services (such as the Vaughan Memorial Library, the Harriet Irving Botanical Gardens, and the new Learning Commons) and abundant opportunities for interactive learning.
2. **Undergraduate research:** The undergraduate research experience reflects the special relationship with faculty and students at Acadia; relationships that can be at once challenging, mentoring, and supportive. Undergraduate students are engaged at an early stage in meaningful research activities that give greater depth to their educational experience. This enhances a student's capacity for critical thinking and analytical reasoning while improving their understanding of research methods in the natural sciences, health sciences, social sciences, and humanities. Students are also provided opportunities for using advanced information technology as part of their research experience.
3. **Education of the whole student:** The integration of intellectual and personal development at Acadia creates a flexible but rigorous framework for the distinctive Acadia education. Educating the whole student is not new at Acadia. The University community recognizes the importance of integrating academic, social, and residential experiences in the context of developing life-long learners. This approach to education helps to ensure that students become active partners in the learning experience.

4. **A focus on the environment and important social issues:** Acadia's curriculum reflects a commitment to protecting and preserving our natural environment. It considers and addresses the interdependency of society and economic development, protecting biodiversity, and sustainability. Acadia's historical emphasis on social issues becomes part of every student's educational experience.
5. **Emphasis on responsible, global citizenship:** Students at Acadia participate in a variety of forums and activities aimed at creating a greater understanding of modern citizenship, ethical decision making, accountability, and their current and future role in improving society.
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APPENDIX B

Excerpt from Acadia's Branding Exercise

The Acadia reputation focuses on exponential growth based on our formula: $1+1=3$. This equation means that the partnership between Acadia and its students results in a sum that is greater than its parts – a result that ensures our students are prepared for more than a career, they are prepared for a rich and rewarding life – as thinkers, communicators, innovators, and individuals.

At Acadia, we believe exponential growth requires a high-quality, high-engagement style of learning – inside and outside the classroom – that educates the whole person. Our academic standards are rigorous and our students are challenged and supported by an outstanding group of professors who are devoted to bringing out the best in them. In our classrooms, students learn to think critically about the world around them. On our campus, our students are part of a close-knit and supportive community made up of students from across the country and around the world.

This partnership for exponential growth is what differentiates us as an institution. Our students inspire us, and we inspire them.

When we communicate who we are in a clear, unique, engaging, and dynamic way, it brings in the tide so that all our boats rise. We all will benefit from the results – we will not only attract more and better-qualified students, more quality faculty will be attracted to our institution; we can increase engagement of our alumni, attract more donors, media attention, and political support. All of these will enhance our university.

The branding exercise identified some key characteristics of how we present Acadia to the world and how we want the world to see us:

Acadia's Positioning

Our positioning represents how we want our audiences to talk about Acadia.

“Acadia is a place devoted to helping its students see, discover and unleash their potential for great things.”

- **Devotion of faculty**, staff and other influencers helps Acadia students identify, understand and bring out the potential that is already in them. This is what Acadia does best. Students will be surrounded by people who are devoted to helping them be even more than they thought they could be.
- **Students with great potential**. There are lots of examples of students who have unleashed their potential to do great things, both at Acadia and after they graduate. Some students may not yet recognize it in themselves when they enter Acadia – but their parents or their guidance counsellors may.

- **The environment** is an incubator, it's a two-way, interactive, involved, close-knit, intimate, supportive, diverse, collaborative, engaging, fun community (both on-campus and the off-campus).
- **Teaching the whole person.** Acadia offers a balance of academic, emotional, spiritual and athletic education, which inspires students to tune in to everything around them, the broader "complete" education. Acadia is positioned to deliver far more than just a career; this approach will help transform and prepare them for life.

Acadia Elevator Pitch

Imagine being stuck on an elevator with only a couple of minutes to tell someone why Acadia University is so great.

How do we talk about Acadia? How do we deliver our compelling difference concisely? Here's a brief script to help make the most of that opportunity. If we are all telling the same story, it makes Acadia that much more memorable.

Acadia is a unique and special place that will touch your heart and your head in equal measure.

For 178 years, we have specialized in providing a premium, high-quality, high-engagement experience for students, primarily undergraduates, from across Canada and over 50 countries around the world.

The Acadia reputation focuses on exponential growth, based on a formula of $1 + 1 = 3$. This equation represents the partnership between Acadia and its students - one that ensures our students are prepared for more than a career; they are equipped for life - as thinkers, communicators, innovators, and individuals. The growth is exponential. The sum is greater than its parts. We inspire each other. That's the Acadia effect.

Acadia's balance of academic, emotional, spiritual and athletic education enriches the whole person - inside and outside the classroom. Our academic standards are high. With small class sizes, a friendly campus, and personal attention, our students are both challenged and supported by faculty, staff and other influencers who are devoted to helping them see, discover, and unleash their potential.

Our environment is an incubator — a two-way, interactive, close-knit, supportive, diverse, collaborative, engaging, and fun community. The university's prestigious but unpretentious personality attracts students who are dialectic, autonomous, versatile, discerning, self-effacing, and kind-hearted, with approximately 80% of Acadia's students volunteering in the community.

And, with 11 varsity teams, Acadia has the most conference and national championships of any university in Atlantic Canada. We also have 107 CIS Academic All-Canadians – the most per student-athlete in the country. For the last 25 consecutive years, Maclean’s has ranked Acadia in the top five undergraduate universities in Canada, placing us in the top three 20 times. We are consistently the highest ranked primarily undergraduate institution in Nova Scotia.

APPENDIX C

Examples of University Strategic Plan Themes

UBC: Place and Promise (updated 2012)

<https://strategicplan.ubc.ca/files/2009/11/UBC-PP-Layout-Aug2012.pdf>

STUDENT LEARNING

The University provides the opportunity for transformative student learning through outstanding teaching and research, enriched educational experiences and rewarding campus life.

RESEARCH EXCELLENCE

The University creates and advances knowledge and understanding, and improves the quality of life through the discovery, dissemination and application of research across a wide range of disciplines.

COMMUNITY ENGAGEMENT

The University serves and engages society to enhance economic, social and cultural well-being.

ABORIGINAL ENGAGEMENT

The University engages Aboriginal people in mutually supportive and productive relationships, and works to integrate understandings of Indigenous cultures and histories into its curriculum and operations.

ALUMNI ENGAGEMENT

The University engages its alumni fully in the life of the institution as valued supporters, advocates and lifelong learners who contribute to and benefit from connections to each other and to the University.

INTERCULTURAL UNDERSTANDING

The University engages in reflection and action to build intercultural aptitudes, create a strong sense of inclusion and enrich our intellectual and social life.

INTERNATIONAL ENGAGEMENT

The University creates rich opportunities for international engagement for students, faculty, staff, and alumni, and collaborates and communicates globally.

OUTSTANDING WORK ENVIRONMENT

The University provides a fulfilling environment in which to work, learn and live, reflecting our values and encouraging the open exchange of ideas and opinions.

SUSTAINABILITY

The University explores and exemplifies all aspects of economic, environmental and social sustainability.

WILFRID LAURIER: Strategic Academic Plan 2015-20

<https://downloads.wlu.ca/downloads/common/documents/strategic-academic-plan.pdf>

Three themes:

- Advancing Academic Excellence
- Expanding Experiential learning
- Enhancing Diversity

UNIVERSITY OF CALGARY: Eyes High Strategy 2017-22

<http://www.ucalgary.ca/sites/default/files/ucgy/groups/Marketing/17-UNV-016-Eyes%20High%20strategy%20document-digital-FINAL.pdf>

Three Foundational Commitments

- Research and Scholarship
- Learning
- Community

linked by two cross-cutting themes:

- Student experience
- Campus culture

UNIVERSITY OF WATERLOO

<https://uwaterloo.ca/strategic-plan/>

The Strategic Plan identifies eight themes (our areas of strength) for Waterloo — five that form our foundation and three that set us apart from other institutions:

Our distinguishing strengths:

- Experiential education
- Entrepreneurship
- Transformational research

Our foundational strengths:

- Outstanding academic programming
- A global outlook (Internationalization)
- Vibrant student experience
- Robust employer-employee relationship
- A sound value system

TRENT UNIVERSITY: Toward A Sustainable Future: The First Integrated Plan for Trent University (2010- 2015)

<http://www.trentu.ca/planning/>

Four themes:

- Commitment to Academic Excellence
- Commitment to Strategic Enrolment Management
- Commitment to Achieving Financial Stability
- Commitment to Strengthening Community Engagement

ST. FX: The Way University Is Meant To Be; Strategic Plan 2017-22

https://www.stfx.ca/sites/default/files/final_2017-2022_strat_plan_2016.pdf

Four Pillars:

These are the pillars of our future:

Academic Excellence

Student learning is at the core of our mission. Our immersive learning environment reflects the principles of liberal education: we provide rich learning experiences and opportunities that promote intellectual and personal development. Faculty research is integral to and informs teaching and the learning experience. Inspired by dedicated faculty and staff, our students develop into analytical, creative, and critical thinkers – global citizens who adapt and engage in an ever-changing world with integrity and curiosity.

Student Experience & Opportunity

Our unique campus environment, rooted in strong tradition, is centred around social engagement and fosters a sense of purpose, community, and active citizenship. Immersion in the StFX culture creates leaders who have unparalleled access to and support from passionate faculty and staff. After graduation, our students become part of a strong network of inspired alumni bound by their Xaverian experiences.

Social Responsibility & Innovation

We, as local and global leaders, collaborate meaningfully and use skill and determination to foster active citizenship and enact positive change. Service is central to our collective identity; in serving others, we continue the very best traditions of the university. We draw upon our substantial human resources to bridge theory with social, cultural, and economic innovation, enterprise, and practice.

Equity & Inclusion

We are a welcoming community, reflective of the diversity of the modern world and strengthened by our differences. We respect and support the needs and aspirations of our students, faculty, and staff by being creative, adaptable, and inclusive in our practice and policies. We provide opportunities to members of all communities to participate, engage, and belong.

Stewardship & Sustainability

We use sound assessment and careful planning to allocate resources to best meet the broader goals of the university. We are purposeful stewards of our resources, considerate of our impact on the environment and our long-term resilience. And, we harness the power of our people: we draw on their knowledge and energy, and support their growth.

CARLETON UNIVERSITY: Strategic Integrated Plan (SIP): Sustainable Communities – Global Prosperity

<https://carleton.ca/sip/wp-content/uploads/Strategic-Integrated-Plan.pdf>

Four themes:

Programs and Enrolment

Research

Students

Organisational Excellence