RD Role in Implementing an Institutional Strategic Plan: Internal and External Strategies
Presenters

Karen Eck, Assistant Vice President for Research, Old Dominion University

Paula Kueter, HSI Grant Project Director, Angelo State University

Anne Maglia, Associate Vice Chancellor for Research and Compliance, UMass Lowell

Jenna McGuire, Associate Director, Translational Data Analytics Institute (TDAI), The Ohio State University
Strategic Planning and RD

- Internal & External Strategies
- Tips, missteps and success stories
- Implementation
- RD approach to Strategic Planning
- Strengths of the RD Professional
Data is a critical element of strategic planning.

More universities are investing every year in collaborative, open data assets to guide decision making.
Higher ed has traditionally lagged in data-informed decision making.

Yet, we have some of the largest data-rich assets available.
Outcome: Solving grand challenges by using transdisciplinary thinking.

Example

Needs:
• Funding
• Success metrics
• Coordination
• Shared data sets
• Partnerships

Data-Driven Solution: University-level, research-based data institute
Lessons Learned

Change Takes Time
- Seed grants are not enough
- Restructuring faculty incentives

Data Literacy is Key
- Each discipline uses different tools / data sets

Demand is only increasing
Building the Research Portfolio:

- Extramural funding
- Transdisciplinary research
- External partnerships
- Research centers
- Visibility, reputation
- Student research
- Entrepreneurship

Campus-wide Involvement in Development & Implementation

UMASS LOWELL 2020 STRATEGIC PLAN

UMASS LOWELL 2020—PILLARS AND COMMITTEES:

Jacqueline Moloney, Chancellor
Strategic Planning Steering Committee: Patricia McCafferty, Lauren Turner, Michael Veyda, Joanne Yestramski

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Academic Sustainability Committee: Rich Lemoine, John Wooding, co-chairs
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Faculty Honors Subcommittee: Jim Canning, Surya Chakrabarti, Tony Szczesniak, co-chairs
Graduate Education Committee: Alkim Akyurtlu, Scott Latham, co-chairs
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Student Success Committee: Nicole Champagne, Kerry Donohoe, Larry Siegel, co-chairs
Financial Wellness Subcommittee: Brenda Evans, Joyce McLaughlin, Steve O’Riordan, co-chairs
Work Readiness Committee: Peter Gaines, Stefane Tate, co-chairs

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Title IX Committee: Ann Claraball, Clara Orlando, co-chairs

III. INNOVATIVE RESEARCH & ENTREPRENEURSHIP
Committee on Innovative Research: Andy Harris, Anne Maglia, co-chairs
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Intellectual Property and Technology Transfer Committee: Rekha Paleyanda, Xingwei Wang, co-chairs
Research Infrastructure and Faculty Support Committee: Matt Nugent, co-chairs
River Hawk Venture Fund Investment Advisory Council: Don LaTorre, Jack Wilson, co-chairs
Nancy Saucier, Fund Managing Director
University Research and Engagement Centers Committee: Andy Harris, Ram Nagarajan, co-chairs

IV. LEVERAGE OUR LEGACY AND OUR PLACE
Economic Development Committee: Scott Latham, Steve Tello, Jack Wilson, co-chairs
Corporate Engagement Subcommittee: Tom O’Donnell, Arlene Parquette, co-chairs
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Marketing Committee: Bruce Hoffman, Sandy Richrathmeyer, co-chairs
Web Advisory Committee: Gerry Nelson, Jim Sherwood, co-chairs

V. ENTREPRENEURIAL STEWARDSHIP
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Financial Planning Committee: Monica Gallizzi, Steve O’Riordan, co-chairs
Some Research Development Approaches

- Improved review and decision making
- Mentorship, project management training
- Institutional resources (FTEs, consultants, incentive funds, etc.)

External Partnership

- 5 strategic focus areas
- Monthly facilitated “meet-and-greets”
- Jointly-sponsored seed funding program

Transdisciplinary Collaborations

- 4 strength areas
- Monthly meetings directed at outcomes
- Funds for seed grants, speakers, travel

Centers and Institutes

- Improved review and decision making
- Mentorship, project management training
- Institutional resources (FTEs, consultants, incentive funds, etc.)
Leverage Regional Opportunities
Organizational Support and Resources
Build Critical Mass in Targeted Areas
Faculty RFP for critical areas
Quality matters too – not just quantity

Engage Faculty – RD professionals can play a key role
For many small to mid institutions, research development efforts are nice, but not consider a major component of the strategic plan.

The impact of RD is generally confined to a small percentage of faculty/staff who choose to pursue external funding external to their appointments.

So, how does RD become a player in the strategic planning world?
Orient your research development strategic plan into the conversation of the institution by:

External Motivations
- Competition
- Changes in student market
- Reduction in funding sources

Internal Motivations
- Changing institutional values
- Practical management of efficiency and effectiveness
Clearly align the need and support your office can provide to the successful implementation of institution's strategic plan.

• Utilize Key Performance Indicators to achieve the success in target areas: STEM improvement, student support, etc.
• Align your goals with the structure your office reports to.
• Be part of the engagement committee, volunteer to participate or lead group discussions.

• Align your resource needs to those of the plan, and make sure you provide impact if your resources are not slated to be enhanced. Always talk going up!
Do your analysis… use data to make your point. If an institution is scrambling for funds, note your competitors success in achieving external funding thus alleviating some of their funding concerns.

Work into the process slowly, watch and listen. Look for those impact areas, albeit small, that are often times overlooked.

Listen to your faculty and staff, as they are your best advocates with upper administration.
• Attend NORDP and research innovative, cross-disciplinary, and cross-organizational ideas and initiatives used by other institutions!

• Look up! Research and understand how the bigger universities integrate RD into visionary plans, as well as strategic plans.

• Understand how your development office works and what needs they have!

• Have at least 5 ideas/plans/innovative thoughts ready to launch!

• Be the leader!

https://implicit.harvard.edu/implicit/
Thank you!

Questions?