

**As approved by the
Board of Governors - June 23, 2011**

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

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23 June 2011

Executive Summary

Toward A Sustainable Future: The First Integrated Plan for Trent University (2010-2015) charts a new course to build on past accomplishments and an outstanding heritage and to prepare for the future. The objective is to move Trent decisively toward a sustainable future consistent with the renewal of Vision, Mission and Strategic Directions concluded in the 2009-2010 integrated planning processes. In this Integrated Plan, Institutional Priorities include:

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

The *Strategic Priorities Fund* will support implementation of the Integrated Plan. Key Actions are highlighted to be considered for implementation in later years of the planning cycle. *Action Leaders* are identified, will work strategically and transparently, and report regularly on measures of success (see Appendix I). Achieving progress in the implementation of this Plan will depend on successful engagement of the vast store of enthusiasm and passion for Trent's success that all members of the Trent community share.

Context and Overall Strategic Intent

In August 2010, *Values, Vision, Renewal – to Action: the Planning Context for Trent University's First Integrated Plan* was produced and widely shared. This was followed in December 2010 by the first draft of *Toward A Sustainable Future: The First Integrated Plan for Trent University (2010-2015)*. This second draft of the Integrated Plan represents a significant step in Trent's long-term commitment to planning discipline and strategic leadership that will serve to guide discussions and decisions at Trent University in this planning cycle and beyond. Trent's overall strategic intent¹ is *'to foster our role as a university that offers high-quality, challenging and distinctive academic programming; to continue to develop our national and international research record and reputation; to be financially stable; and to be organizationally and administratively responsive to changes in external and internal climates.'*

One of the most important considerations in this planning cycle is to make progress in achieving the recruitment and retention targets, defined by Key Performance Indicators, in Trent University's Multiyear Enrolment and Retention Plan (April 2010). The university is far from homogeneous; enrolments in some areas have grown while those in others have declined. Understanding the factors driving enrolments is a critical need, and must be based on ready access to the appropriate internal data. The goal is to create a financial environment in which the institution's academic operations and aspirations are fully realized or are at least realizable. The external context is certainly of great

¹ *Values, Vision, Renewal – to Action: the Planning Context for Trent University's First Integrated Plan*, August 2010 (<http://www.trentu.ca/planning/>).

importance in the effort to influence positively Trent University's budget dynamic. For example, the overall provincial strategy for the period 2010-2015 is one of growth and (limited) new resources as outlined in the March 2010 Ontario Provincial Budget, which identified increased postsecondary participation rate targets (up to 70%), expectations for increased student numbers through demographics and demand drivers (current projections are for 41000 new undergraduates, 10000 new graduates, 50% more international students in the coming five years), and the introduction of negotiated targets for each institution based on capacity to meet demand.

An important challenge for Trent University, which this Plan is intended to help address, is to maintain a commitment to academic excellence and quality, and participate in this provincial enrolment growth strategy in ways that serve our students and community and contribute to overall institutional development.

Integrated Planning Priorities and Key Actions

Toward A Sustainable Future: The First Integrated Plan for Trent University (2010-2015) is comprised of four Institutional Priorities and a series of recommended Key Actions that will be considered for implementation in phases in later years of the planning cycle. Administrative leadership from within the President/Vice-President Executive Committee (PVP), the Provost's Planning Group (PPG), and the Extended Management Committee (EMC) is identified, and these *Action Leaders* will work with others to direct resources strategically and transparently to implement this Plan and to measure success. Activities pursued as part of this Integrated Plan are subject to the appropriate approval and governance processes (e.g., Senate approval of a new academic program; Board provision of resources to support such programs). The Strategic Priorities Fund is available to support implementation of this Plan. A process by which *Action Leaders* identified in this plan can be considered for access to these limited funds will be developed by the President/Vice President Executive Committee.

Toward A Sustainable Future: The First Integrated Plan for Trent University (2010-2015) is an integration of business and academic planning, which are at different states of maturity at this time in the development of the institution. Clearly, the Integrated Plan contains elements of a business plan, but is not itself a stand-alone business plan. Similarly, the Integrated Plan is not a stand-alone academic plan though it does contain significant aspects of academic planning. Integrated planning is comprised of elements of academic and business planning, and a balance may be achieved through the selection of priorities. And finally, the Integrated Plan is not a comprehensive synthesis of all we do or should do. Universities always require additional processes and documents to support integrated planning. At Trent, for example, capital planning has not been formally considered in this cycle of integrated planning, although a comprehensive operating/capital planning process to consider all these aspects of university activity at one time would be highly desirable in the next planning cycle (2016-2021). While priorities are identified in this Integrated Plan, there remains a need to maintain an ongoing commitment to adaptive and flexible planning processes, an intense focus on certain outcomes, and constant attention to changing external and internal dynamics. This

requires a commitment to foster debate and discussion in all of the university's many deliberative and decision-making fora. Wherever possible, the Plan attempts to identify and support self-regulating processes rather than establish singular or 'ideal' end point goals.

No planning process is omniscient. There may very well emerge in this planning cycle influential opportunities (perhaps driven by capital planning or other developments), new priorities, and new ideas that will necessitate a reasonable degree of flexibility and adaptability in implementation of the Plan amidst the full range of activities within the institution. Identification of the activities in this Plan does not imply that other actions are not to be pursued, or that a final judgement has been passed on any individual unit-level plan or specific planning initiative, which collectively constitute an incredibly valuable strategic resource for Trent. Many initiatives and activities, not specifically highlighted here, some perhaps already in progress, should and will continue to develop.

Building on the Past, Building for the Future

This Plan identifies many of the important activities that will help Trent move toward a more sustainable future based on existing and emerging university strengths. The key is to continue building on the past and building for the future while aspiring to high university academic and intellectual standards. In this Integrated Plan, four Institutional Priorities are identified:

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

Commitment to Academic Excellence

An Academic Plan for Trent University will be developed with the leadership of the Provost and Vice-President Academic, who will direct a comprehensive academic planning process involving faculty, and the Provost's Planning Group, the Vice-President Academic Advisory Committee, Dean's Councils, Faculty Board, Faculty Council and Senate. The first priority is to establish a clear and compelling commitment to the university as an academic institution inclusive of all the university's academic units, programs and departments. The Academic Plan will be a foundational document in an Academic Program Review designed to ensure that all programs at Trent University are robust and viable and to identify strategic initiatives that will have a lasting effect on the university's success and development. Ideas, such as the wide range of marketing approaches, and ways to support the Multiyear Enrolment and Retention Plan (April 2010, updated March 2011), will be explored in light of Trent's pursuit of academic excellence, quality, and support of academic goals (e.g., flexibility of 'majors'). The Academic Plan must identify ways in which to support the Library's Strategic Plan, a cornerstone of faculty research and undergraduate and graduate work. The role of Trent University's commitment to interdisciplinarity, the identity and context of Trent

University Oshawa Thornton Road Campus, the possible role of Schools, the introduction of new chairs and professorships, faculty renewal, quality assurance, and the contribution of new programs to the enhancement of Trent's intellectual and academic culture, are all important organizational and intellectual issues to be clarified.

The Management of Unit-level Planning, a key part of the Academic Plan, will continue the review of unit-level plans submitted in June 2010, and additional unit-level planning activities anticipated throughout this planning cycle. Academic and administrative unit-level planning processes will be aligned with this Integrated Plan and the need to prepare for the development of Trent's Second Integrated Plan (2016-2021). The existing unit-level plans will be shared widely and appropriate actions identified for implementation through the Dean's Councils, and other administrative structures and deliberative bodies, with the final decision-making and budget responsibility held by the Provost's Planning Group. Units will be provided an opportunity to submit revised unit-level plans; in future years, unit-level planning will require both an annual update and a report on progress. With substantial lead-time each year, all units will be provided substantive comment on the unit plan update of the previous year, along with a request for the annual update and progress report. All units will also be provided the opportunity to pose questions and responses to the comments they receive in direct person-to-person meetings as well as in writing before submitting the update and progress report. Direction will be provided by the Provost's Planning Group (e.g., units will be invited to respond to the enrolment targets contained in the Multiyear Enrolment and Retention Plan). Given the high level of engagement, and the critical importance of unit-level planning initiatives, consideration will be given to an appropriate support mechanism for units engaged in planning, and PPG's overall responsibility for management (e.g., a single 'point-person' for integrated planning, and broader coordination with Deans and Chairs as part of the unit-level planning in future).

Commitment to Strategic Enrolment Management

Trent is committed to the development of an effective Strategic Enrolment Management process focussed on student recruitment, retention, engagement and success. The Strategic Enrolment Management (SEM) Committee will continue implementing recommendations associated with earlier analysis of Trent's enrolment situation and programs, and will be responsible for monitoring successful recruitment and retention strategies and practices (e.g., review of Territorial Management, a program to strengthen academic advising, and participation by academic units in enrolment strategy). A near-term Trent housing strategy will be considered as part of the effort to support enrolment management. A Five Year Oshawa Plan, currently under development, will be approved for the Trent University Oshawa Thornton Road Campus, and this will help position Oshawa, both in terms of funding and attitude, as an integral part of Trent University with its own unique nature, requirements, and level of autonomy.

A distinctive Positioning Statement will be developed to communicate to prospective students, faculty, staff and the wider community the diversity of Trent and 'what we are and what we aspire to be'. This statement will flow naturally from the Academic Plan for

Trent University, and the renewal of Vision, Mission and Strategic Directions. Positioning, and branding, will shape and influence marketing and communications throughout the institution and will be conducted with appropriate market research and testing. When considering the student experience, an interesting challenge exists in balancing a diversity of programs, a commitment to a philosophy of integration in teaching and research, and the potential opportunities for new growth (in research and enrolment, for example). There is a need to better understand the student profile, to improve the 'in-class' and 'out-of-class' experience – to base our pedagogy on excellence and understanding of learner needs and development.

Commitment to Achieving Financial Stability

A Multiyear Budget Framework Planning Tool with multiple scenarios and transparent assumptions will be developed to support strategic resource allocation and budget reduction/allocation approaches based on this Integrated Plan. The Framework will assist budget managers in preparing budget submissions and will be used to increase overall awareness in the Trent community of key budget drivers. The Vice-President Administration and the Provost and Vice-President Academic will share responsibility for the development and presentation of the Multiyear Budget Framework, which will be employed and reviewed by the Finance and Property Committee of the Board, Extended Management Committee, the Provost's Planning Group and the Senate Academic Planning and Budget Committee, among others, in development of the Annual Operating Budget of Trent University. This approach will promote awareness of ways to enhance revenues, identify and influence rates of expenditure, clarify impacts of strategic opportunities and challenges, and highlight potential academic and administrative efficiencies (such as improving real-time financial records, smooth transfer entry). To help introduce the Multiyear Budget Framework, a Financial Literacy Program will be implemented to ensure that assumptions, principles and realities of current budget planning, including the need for deficit reduction, decision making based on relevant evidence, and budget accountability, are widely shared. The literacy program will be available to all staff, faculty, and all interested members of the Trent community. In developing and implementing a financial literacy program, the following points will be clearly recognized and taken into account: 1) there already exists substantial financial knowledge within the University community that constitutes a resource for further development; 2) critical debate, rather than straightforward information delivery, is an effective means of encouraging financial literacy; 3) there are areas of disagreement and differing presuppositions among financial experts, and a key aim of the financial literacy program should be to make these differences a matter of explicit attention; and 4) there should be a practical focus that acknowledges substantial areas of uncertainty in actual financial decisions.

At the same time, continued efforts will move the university toward a decentralized budget. Deans and administrative unit-managers will be assigned budget lines and allocations will be tied to widely-shared and agreed-upon criteria (e.g., growth in specific factors, such as student enrolment and retention, demonstrable excellence and high quality in faculty teaching, improved pedagogy, administrative priorities, and research

success). A much clearer view of revenues and costs must be available. There will be an annual ‘fiscal and operational snapshot’ of each program/cost centre that will be made available to all academic and administrative units to increase awareness and understanding of the unit-level and overall financial landscape, and Trent’s fiscal capacity. Such an open and transparent approach may help address issues of organizational culture, workload and program delivery. The methods of developing and sharing the unit ‘snapshots’, or descriptions, will be determined in consultation with the units concerned and, as appropriate, with Trent’s deliberative bodies, such as Faculty Council, Faculty Board and Senate.

Commitment to Strengthening Community Engagement

Vibrant and vital connections exist between Trent University and the many external communities we serve. Few universities have enjoyed a more powerful synergy with their supportive communities, and the Trent community dynamic extends in multiple dimensions locally, regionally, nationally and internationally. The approach to strengthening community engagement is to develop even greater mutually beneficial relationships by being responsive to alumni, listening to the Trent community, understanding community needs, and continuing support for Trent University as a leader in the community. Under the leadership of the Vice-President External Relations and Advancement, a comprehensive engagement strategy will be developed, which recognizes the critical role of strong external and government relationships, the role of alumni and the need for philanthropy to follow academic and research needs. For example, Trent’s Board-approved Philanthropic Plan, the current \$50M Campaign, and the Centres of Knowledge Framework, will be reviewed to reflect the priorities identified in the Academic Plan. Efforts will continue to ensure a culture of philanthropy is fully embraced by faculty and administrators over this planning cycle.

These activities will lead naturally to a Community Advisory Council, to be coordinated with activities in Trent’s Career Centre, to work to help academic and administrative units introduce more co-op, internship, community-based and experiential learning opportunities in concert with community partners. The Registrar and Associate Registrars will ensure that pathways match with regulations and accreditation requirements, and that Trent’s position of leadership in Ontario university-transfer programs is maintained (e.g., strong collaborations with new and current partners such as Fleming, Loyalist, UOIT, and Durham College). A Survey of Community Life-long Learning Needs will be conducted to identify potential continuing education and academic initiatives that are consistent with university academic and intellectual standards. A rich array of life-long learning opportunities exist in the communities we serve, and the role of Trent must be clarified based on the need for revenue generation and larger trends, such as the development of the Ontario Online Institute. The development of more on-line courses, and more summer courses, can help improve many aspects of student and community success, including increased student enrolment and retention rates.

Key Actions to be considered during this Planning Cycle (2010-2015)

The following Key Actions are recommended for consideration in subsequent years of this planning cycle consequent on progress in the four Institutional Priorities in the coming year and as part of a phased-in approach to 2014.

First Phase (2011- 2012)

1. A Strategic Information Technology Plan will be established with the co-leadership of the Vice-President Administration and Provost and Vice-President Academic supported by all members of the senior administrative team, the Extended Management Committee, the Dean's Councils, and the Provost's Planning Group. The goal is to improve the management, planning, and implementation of the University's information technology initiatives to support the Mission and Strategic Directions of the University and to help the University provide effective services. This Plan will recognize that IT is fundamental to academic and intellectual life, with investments to be emphasized in this planning cycle, and will provide a foundation for the development of the IT infrastructure and standards that are critical to ensuring interoperability, consistency, and effective management of information technology costs. The vision for information technology use at the University will consider the development of an enterprise-wide focus to the application of IT, a focus on serving the University community and an emphasis on enabling institutional processes. *Action Leaders: Vice-President Administration, and Provost and Vice-President Academic; Timeline December 2012*
2. As part of the Academic Plan for Trent University, new undergraduate academic programs will be considered for implementation in this planning cycle based on academic merit and sound business plans. The responsibility for consideration of new programs initially rests with PPG, who have identified several candidates in the 2010 unit-level plans to be considered for implementation during this planning cycle. Expansion of undergraduate academic programs at Trent Oshawa Thornton Road Campus will be considered with the approval of the Trent University Oshawa Five Year Plan currently under development. The Trent University Oshawa Plan will continue the direction of establishing a distinctive identity in Oshawa, with appropriate academic, administrative and professional support. On-line course development will be supported in focussed areas identified through unit-level planning. Overall, successful existing programming should be well-supported and new programming should build on recognized and unique strengths of Trent University. *Action Leaders: Deans, Provost and Vice-President Academic; Timeline December 2011 with annual updates thereafter*
3. Graduate studies is one of the University's six Strategic Directions, and to achieve the graduate student enrolment targets set out in the Multiyear Enrolment and Retention Plan (April 2010), we will: stabilize current graduate programs; enhance our recruitment efforts; allow small increases in the number of students who receive funding in existing programs with faculty capacity; and consider new programs based on their academic merit and a sound business plan detailing both

current and future financial considerations. Course-based, professional Masters degrees that operate on a cost recovery basis or are revenue-generating should be considered in areas of research strength and where there is a social and market need. Moderate growth in graduate programs and student numbers will be the basis on which we make our case for an increase in provincially-funded FTE.

Action Leaders: Dean of Graduate Studies, and Provost and Vice-President Academic; Timeline December 2012

4. An Employee Relations and Services Initiative will be launched to identify and recommend best practices to ensure an even stronger reputation for Trent University as an employer destination of choice. An annual employee satisfaction survey will be implemented and appropriate responses will be timely and effective in meeting identified needs. This survey will include a Review of Employee Empowerment to facilitate faculty, staff and student initiatives by identifying and removing obstacles to creativity and innovation, supporting leadership development, and introducing greater unit-level responsibility and accountability for tasks (e.g., to implement streamlined processes to reduce excessive paperwork). Timely appointments of leadership in currently vacant or acting positions in academic administration will be made. *Action Leader: President; Timeline December 2012*

Second Phase (to end of 2013)

5. The development of an Integrated Learning Commons will be considered with the goal of greater integration of functionality of student support. Possible co-location options could involve the Library, undergraduate Associate Dean, academic advising, the Career Centre, Academic Skills, Student Health and Counseling, DSO, others – such a model is in place and working well in Oshawa. Academic advising will be integrated and enhanced by developing a complementary system of part-time in-college Senior Tutors and full-time centralized professional advising. Stronger coordination of the Registrar's Office with other units is essential, and would integrate enhanced programming for at-risk students, a 'service-first' ethos in all front-line locations, shared (annual) analytical reviews of NSSE and GPSS surveys, and measures of success of previous and current investments. *Action Leaders: Provost and Vice-President Academic, University Librarian, and Associate Vice-President Student Services; Timeline September 2013*
6. The role of the Colleges as a recruitment, retention and engagement mechanism will be clarified (cost-benefit and qualitative impact on the student experience). This analysis will begin with an assessment of the College Review Task Force Summary Recommendations. A fair and open measure of the importance of the College system to students is required. *Action Leader: Provost and Vice-President Academic; Timeline December 2013*
7. A comprehensive internal Trent Recognition Program will build on the proven success of Trent's existing employee Rewards and Recognition Program and will create new opportunities to highlight the outstanding contributions of all members of the Trent community, for students, alumni, staff, faculty, volunteers. This will

- be a step toward showing appreciation of the contributions of all employees, not only a select few each year. Such a program will leverage events during the President's Community Tours; one goal is to recognize and encourage stronger participation in the Tours by faculty, alumni, students, and senior leadership (e.g., members of Senate, Board, EMC, PVP, PPG, etc.). Academic and administrative leaders will work through the Alumni Council to more strongly leverage alumni capacity and desire to be involved at Trent. *Action Leaders: Associate Vice-President Human Resources, Director ERA Operations; Timeline September 2013*
8. A Scholar Cohort Mentoring Model will be implemented to build on institutional supports for research and scholarship, including the dissemination of research findings, and improving Trent's already impressive grantsmanship and funding success (e.g., Tri-council granting success, industry-sponsored research contracts). Such a model will be supportive of ways to help both new and established scholars contribute to raising the intellectual tone of the university in all areas of scholarly interest. Where relevant or appropriate, this Model will also help scholars become more aware of opportunities for commercialization. *Action Leader: Vice-President Research and International; Timeline September 2013*

Third Phase (to end of 2014)

9. A Review of Administrative Systems and Organizational Processes will be initiated based on the need to identify and support strengthening of organizational culture, system efficiencies and effectiveness, to consider the viability of current activities, and to implement appropriate structural change where necessary to achieve institutional coherence, clarity and sustainability. Overall, the university's administrative processes support the academic mission of the institution. Several components are envisioned, including a consideration of communications' effectiveness (e.g., internal and external, use of the portal, eGazette, President's Monthly Reports), financial services (e.g., structure and appropriateness of an internal audit function at Trent, integration of research accounting and finance activities, timing of account statements), and student services (e.g., both graduate and undergraduate student services, enhancing a culture of student satisfaction based on academic, cultural and social dimensions of student success, adhering to best practices in registrarial functions, recruitment, student engagement, risk management, career development and planning, academic skills development, wellness, student conduct and discipline (and their role in retention practices), orientation, in-course mentoring, and other services, such as developing instructional expertise and academic advising). *Action Leader: President; Timeline September 2014*
10. Engagement and outreach to Aboriginal communities will be strengthened based on best practices for recruitment and retention across the university and in specific markets. For example, a new initiative with community leaders will be introduced called The Thunderbird Camp, a two-week on-campus summer camp for Aboriginal "Leaders of Tomorrow" led by Trent staff and student employees in consultation with Indigenous Studies and integrated with our current academic

- and other programming (e.g., Enrichment Camp, TSSC). *Action Leader: Provost and Vice-President Academic; Timeline September 2014*
11. A Trent University Housing Strategy will build on the near-term housing strategy supporting enrolment management, and will be designed to consider long-term (present and future) student needs for housing and residence options. Housing is a key aspect in conversion of applicants, for example, and a thoughtful housing program is integral to their success and the development of ‘community’. Such a strategy will incorporate student perspectives, views from the community, and appropriate market research. This long-term strategy will be one step in the ongoing and strategic process of identifying and building Trent’s communities to leverage the outstanding legacy of infrastructure and natural beauty on Trent’s Endowment Lands. *Action Leaders: Vice-President External Relations and Advancement, and Associate Vice-President Student Services; Timeline December 2014*
 12. An International Advisory Council will be (re-)launched to review the success of the current Trent international recruitment model relative to third-party international recruitment services with a proven track record, to consider potential new markets (e.g., tripling of UK tuition suggests potential international student market development opportunity), and to provide advice and recommendations on international programming (e.g., Study Abroad, ESL Pathways, ESL for Specific Academic Purposes). *Action Leaders: Director of Trent International Program, and Provost and Vice-President Academic; Timeline: September 2014*

Summary and Next Steps

Toward A Sustainable Future: The First Integrated Plan for Trent University (2010-2015) identifies four Institutional Priorities for the coming year in this planning cycle:

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

In addition, Key Actions are identified to be developed and potentially phased-in during later years of the planning cycle. In the build-up to this Integrated Plan, much has been accomplished, and the process has revealed the depth and breadth of the many tasks before us. For example, the development of an Academic Plan for Trent University, which emphasizes academic excellence and quality, is acknowledged as a critical contribution requiring the commitment and participation of all members of the Trent community. Commitments to Strategic Enrolment Management, and the Multiyear Budget Framework, will help Trent achieve academic goals through increasing institutional financial literacy and improved unit-level budget processes. Community engagement will always be a priority for Trent, expressed in dynamic community relations, alumni and stakeholder engagement, and these will increase as we approach Trent University’s 50th anniversary in 2014-2015. In successive years of this planning cycle, a Strategic Information Technology Plan is recommended that will emphasize the

critical contribution of IT to the academic and intellectual life of the university and provide necessary guidance for potential investments in this critical area. Institutional consideration of positioning, branding, and marketing approaches is required, and continued leadership in multiple collaborations and partnership development will be leveraged.

Toward A Sustainable Future: The First Integrated Plan for Trent University (2010-2015) envisions positive outcomes, such as empowering staff and faculty, creation of a responsive and collegial administration, and phased-in activities that build on those institutional qualities which have made Trent such a special place for so many for so long. Trent is fortunate to have the passionate support and goodwill of a strong and diverse community upon which to draw for continued inspiration. The Integrated Plan is designed to move Trent University decisively toward a sustainable future – the next level of achievement and aspiration for Trent. Progress will be monitored annually, and success measured and reported in a transparent and collegial process through Trent’s existing deliberative and administrative structures. The Integrated Plan calls for new planning initiatives and actions that build on the renewal of Vision, Mission and Strategic Directions, and the many ideas and innovations suggested in unit-level plans, which collectively are an outstanding strategic resource that will serve the institution well in many ways throughout this planning cycle and beyond. In the final year of this Plan, our 50th anniversary in 2014-2015, we will have set the stage for Trent’s Second Integrated Plan (2016-2021).

Appendix I. Key Actions Measures of Success and Timelines

Measures of Success are indicated in the following tables for each of the Key Actions in Trent's First Integrated Plan. The *Measures of Success* approach taken in this planning cycle is based on the typical 'balanced scorecard' approach often used in universities and other public sector organizations (<http://www.balancedscorecard.org/>). This approach can help maintain a focus on strategic objectives and provide feedback on the progress toward achieving success. By the end of this planning cycle, reoccurring and overarching *Measures of Success* can be succinctly stated – for example, increased financial resources (e.g., surplus position with eliminated operating deficit), higher enrolments, and higher-levels of satisfaction expressed by members of the Trent community. Typically, in this approach, fewer measures are better (an institutional impulse to measure everything is known to contribute to strategic (directional) confusion). Interconnections among the Key Actions will be carefully mapped – perhaps in the form of a strategy map that refers to the Integrated Planning Institutional Priorities and to Trent's new Vision, Mission, and six Strategic Directions. As clearly as possible, the final set of *Measures of Success* will be evidence-based with well-understood data collection and analysis protocols. A transparent (typically, quarterly and annual) reporting mechanism is desirable and will be employed over the planning cycle (2010-2015).

Draft Balanced Scorecard – Measures of Success, Milestones and Timeline for Completion

A. Institutional Commitments

| Institutional Commitment | Measures of Success | Milestones | Timeline for Completion | Action Leaders |
|-----------------------------------|---|---|---|--|
| 1. Academic Excellence | Increased satisfaction based on user feedback – students, staff, faculty Independent measures | Academic Plan by December 2011, Academic Program Review in 2012, Marketing and branding by March 2012 | December 2011 for Academic Plan | Provost and Vice-President Academic, Vice-President Research and International |
| 2. Strategic Enrolment Management | Strong existing and new programs approved by Senate and Board; increased enrolment; increased student satisfaction; increased student entering average; increased reputational rankings; increased out-of-province enrolment | Enrolment targets, unit-level planning, program proposals based on unit-level plans, academic merit and sound business plans | September 2012 | Provost and Vice-President Academic |
| 3. Financial Stability | Increased financial accountability, increased financial resources, stronger fiscal environment Seek input from Provost’s Planning Group; Feedback from budget managers Funding mechanisms for pension, deferred maintenance; Strategy for cumulative deficit reduction strategies | Multiyear Budget Framework in 2011, Financial Literacy Program in 2011, Budget decentralization over this planning cycle (Dept. Chairs) | December 2011 for a Multiyear Budget Framework, | Vice-President Administration, Provost and Vice-President Academic |

| Institutional Commitment | Measures of Success | Milestones | Timeline for Completion | Action Leaders |
|---------------------------------|---|---|--------------------------------|---|
| | Expand engagement plan Continuing and distance education strategy | | | |
| 4. Community Engagement | Expand engagement plan, Revised philanthropic timelines, stronger alumni connections and engagement Continuing and distance education strategy | Community council, positive survey initiatives, more community-based learning | December 2012 | Vice-President External Relations and Advancement, Vice-President Research and International |

B. Key Actions

| Key Action | Measures of Success | Milestones | Timeline for Completion | Action Leaders |
|---|--|--|------------------------------------|--|
| <i>First Phase (to end of 2012):</i> | | | | |
| | | | | |
| 1. Strategic Information Technology Plan | Key infrastructure investments, service and technology enhancements, increased satisfaction and feedback | Improve management, planning and implementation of information technology initiatives, measured student, faculty, staff satisfaction with IT support and systems | December 2012 | Vice-President Administration, Provost and Vice-President Academic |
| 2. Undergraduate academic programs | Programs approved by Senate and Board; increased enrolment; increased student satisfaction; increased student entering average; increased reputational | Program proposals and existing program support based on unit-level plans, academic merit and sound business plans, beginning in January 2011 as part of the | January 2012 and on-going annually | Deans, Provost and Vice-President Academic |

| Key Action | Measures of Success | Milestones | Timeline for Completion | Action Leaders |
|---|--|--|-------------------------------------|--|
| | rankings | Academic Plan | | |
| 3. Graduate programming | Programs approved by Senate and Board; increased enrolment; increased student satisfaction; increased reputational rankings | Program proposals based on unit-level plans beginning in January 2011 as part of the Academic Plan | December 2012 and on-going annually | Dean of Graduate Studies, Provost and Vice-President Academic |
| 4. Employee Relations and Services Initiative | Increased satisfaction based on user feedback – initially, students, staff, faculty | Identify and recommend best practices to ensure stronger reputation; Annual employee satisfaction survey/focus groups | December 2012 | President |
| <i>Second Phase (to end of 2013):</i> | | | | |
| 5. Integrated Learning Commons | Integration of student services/support in one-stop location; relationship to increased student satisfaction, retention, enrolment | Space review and possible allocation; secure capital funding; review of functionality; program evaluation | September 2013 | Provost and Vice-President Academic, University Librarian, and Associate Vice-President Student Services |
| 6. Role of the Colleges | Increased retention and recruitment; increased student satisfaction | Review of College Review Task Force Summary Recommendations; develop measures of College effectiveness and importance | December 2013 | Provost and Vice-President Academic |
| 7. Trent Recognition Program | Increased employee satisfaction; increased participation in President's Community Tours; Alumni Council feedback | Trent Recognition Program design, guidelines and process | September 2013 | Associate Vice-President Human Resources, Director ERA Operations |

| Key Action | Measures of Success | Milestones | Timeline for Completion | Action Leaders |
|--|---|--|--------------------------------|--|
| 8. Scholar Cohort Mentoring Model | Increased faculty satisfaction with research support; e.g., dissemination, grantsmanship, commercialization | Model development and implementation | September 2013 | Vice-President Research and International |
| <i>Third Phase (to end of 2014):</i> | | | | |
| 9. Review of Administrative Systems and Organizational Processes | Identify systems efficiencies and effective organizational processes and structures Evaluate Oshawa's organizational structure | Terms of Reference; identify measures and process; implement review; effect changes to begin Trent's Second Planning Cycle | September 2014 | President |
| 10. A focussed initiative to increase outreach to Aboriginal communities | Adoption of best practice; Thunderbird Camp launched | Appropriate consultation process; effective design of leadership and administrative structure | September 2014 | Provost and Vice-President Academic |
| 11. A Trent University Housing Strategy | New housing options identified and implemented | Initial market research; Draft housing strategy | December 2014 | Vice-President External Relations and Advancement, Associate Vice-President Student Services |
| 12. International Advisory Council | Increased enrolment in international programs; increased reputation internationally | Draft Terms of Reference; analysis of alternate models initiated | September 2014 | Provost and Vice-President Academic, Director of Trent International Program |

Appendix II. Document History

The first draft of *Toward A Sustainable Future: The First Integrated Plan for Trent University (2010-2015)* was prepared by the President/Vice-President Executive Committee and circulated widely on December 17, 2010. Feedback from many individuals and groups was received (available in the President's Office), and a series of meetings was held for discussion and consultation:

Senate Academic Planning and Budget Committee
Board of Governors
Extended Management Committee
External Relations and Advancement
Faculty Board
Lady Eaton College Cabinet
President/Vice-President Executive Committee
President's Open Forum for Staff
Provost's Planning Group
Senate
Faculty Council

On 1 March 2011, a second draft of the Integrated Plan was produced and widely-shared. In late March and April 2011, a number of Open Forum and meeting opportunities were held. Alumni, students, staff and faculty provided feedback, much of which has been incorporated into this third draft. An important outcome of these discussions was the commitment, by all participants to share widely comments and perspectives such that readers of the Integrated Plan could see the influence such comments and perspectives have had on the Integrated Plan. The following notes represent a synthesis of comments made as part of this phase of the consultation process:

- The importance of strategic cartography as a tool to understand market-based education should be recognized;
- Branding and connection to institutional positioning should be strong, certain image of 'blandness' must be removed; possibly niches defined and promoted provincially, nationally, internationally; Trent's radical/activist reputation; appeal to under-represented groups;
- Need for the Academic Plan to include student, faculty, alumni, retirees, leadership, advice and input, but rely on existing structures and leadership (e.g., the Deans); Academic Plan must be available before the next budget cycle;

- Levels of responsibility in unit-level planning should be clarified; looking beyond units in the planning process is required; be careful that planning does not become an end unto itself (the pendulum);
- Emphasize the role and interpretation of community engagement and community-based research;
- The funding model should reflect current reality – advocacy with the province focussed on the growth model; fiscal crisis is not new, Trent has always been financially challenged
- The idea of offshore or satellite campuses should be explored (international);
- Trent should work to improve internal communications;
- Relevant data are not always clear or available – this must improve;
- Serious work is required on the definition of the ‘types’ of university; the language and meaning are not well understood (e.g., Carnegie Foundation for the Advancement of Teaching categories for ‘comprehensive universities’);
- A more coherent identity for Trent is suggested that holds within a possibility of diversity;
- Student expectations have changed and must be better understood; other universities have caught up to Trent’s innovative interdisciplinarity;
- Emphasis on interactive teaching, experiential learning, field courses and less ‘one-size-fits-all’ pedagogical approaches; emphasize quality program delivery.

This (third) draft of the Integrated Plan will be presented to Senate on May 10 for endorsement, and the Board of Governors on June 23 for approval.