

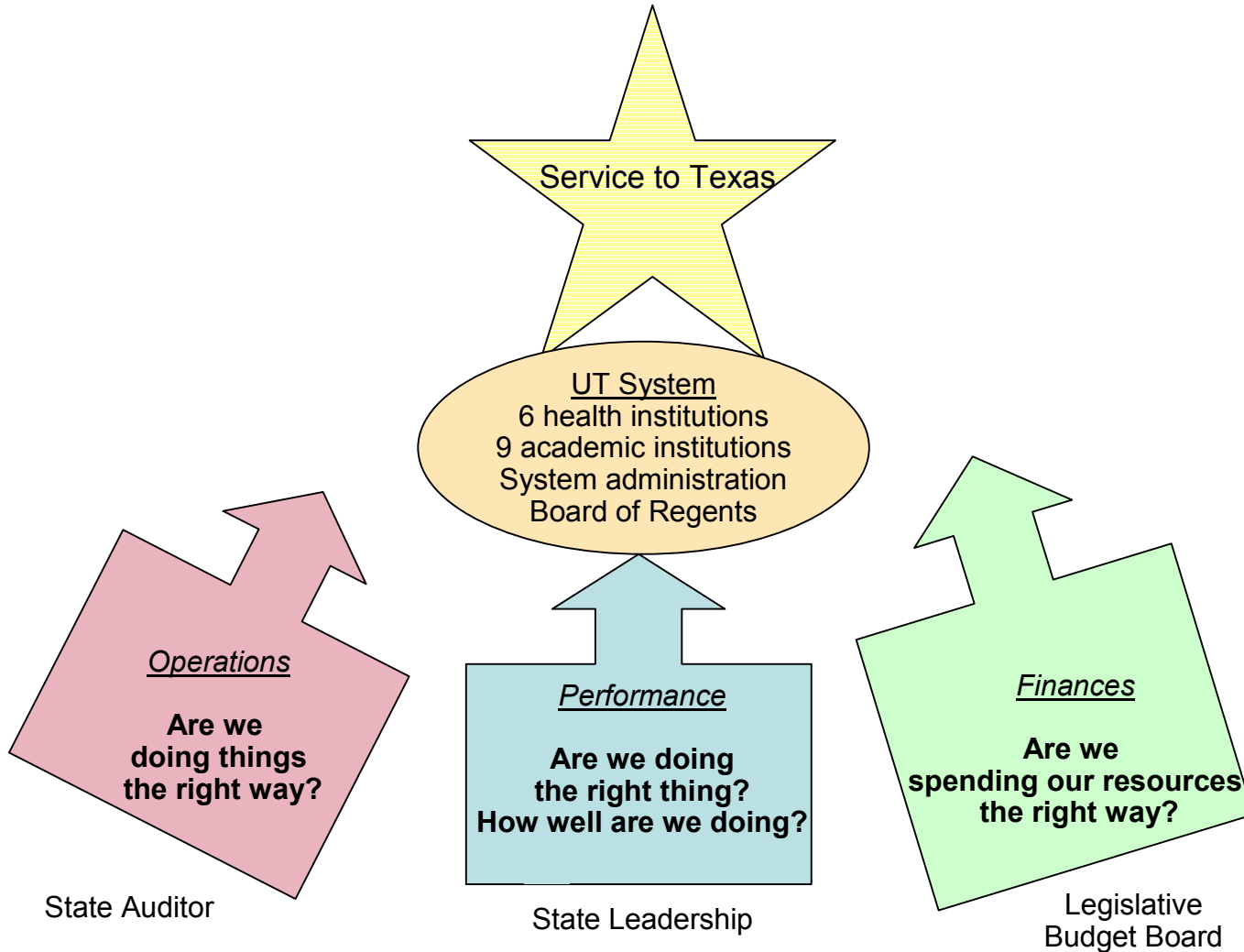


SCUP
November 2005

**Radical Makeovers Texas-Style:
Accountability, Strategic Planning, and
Organizational Change**



Planning and Accountability Context





Old Planning Framework

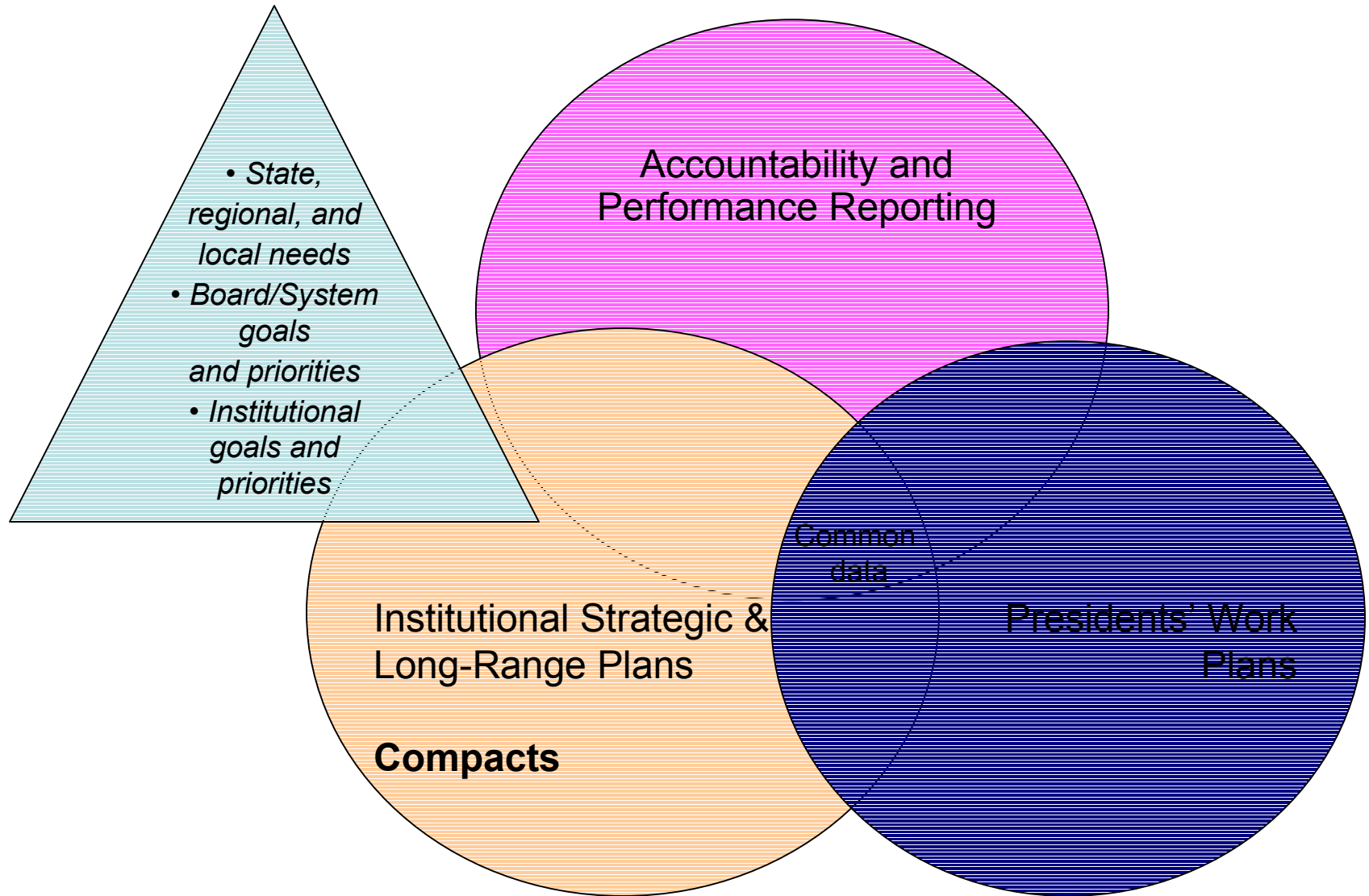
State Requirements

Board Planning

Institution Planning



New Planning Context





Accountability

Accountability and Performance Reporting

- Students, Research and Health Care, Community Impact, Organizational Efficiency
- 70 measures for academic institutions
- 50 for health institutions
- Peer comparisons

<http://www.utsystem.edu/ipa/accountability.htm>

<http://www.thecb.state.tx.us/InteractiveTools/Accountability/>



3-Level Planning Initiatives

**Institutional Planning
Institutional Compacts**

System Planning

**Board of Regents
Planning**



Presidents' Work Plans

**Presidents' Work
Plans**



What Is a Compact?

A succinct written agreement between the Chancellor and a president that summarizes an institution's major goals and priorities, strategic directions, tactics, measurable outcomes, and critical issues for an 18 to 24 month period.



Compacts in the Planning Context

The compacts are based on a planning process that will

- Involve people who will carry out the plan
- Include faculty and key staff
- Forge consensus about goals and priorities – short, intermediate, and long-term
- Translate into specific actions
- Conduct cost-benefit analysis; decide where to invest funds

The Compact is an intermediate stage:

- Focuses on specific objectives that people are going to be held accountable for
- Two-year horizon



What Does a Compact Contain?

1. Institution mission
2. Major short-term and ongoing priorities and initiatives, and progress metrics
3. Future initiatives of high strategic importance
4. Impact of initiatives
5. Connections to System and State priorities
6. Compact development and consultation process
7. System contributions
8. Budget and key statistical information

For all compacts see:

<http://www.utsystem.edu/ipa/compacts/homepage.htm>

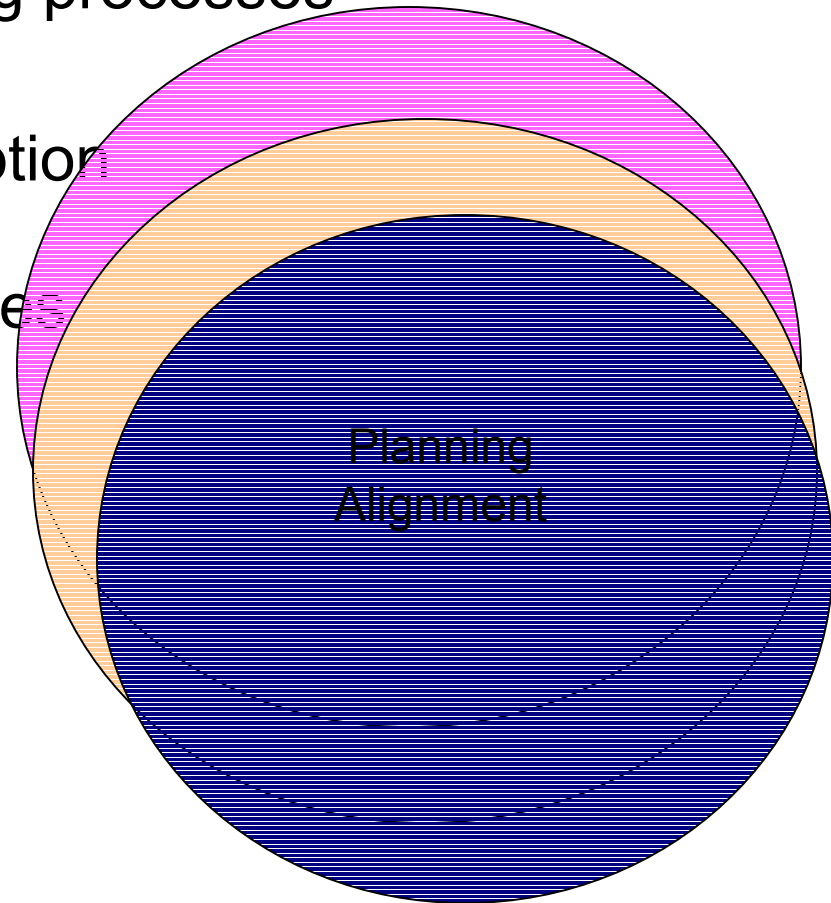


Impact on the System

- Jump-started renewed strategic planning
- Sharpened alignment of planning processes
- Improved consultation
- Increased consistency in description of specific tactics
- Focused on measurable outcomes

For more information visit:

<http://www.utsystem.edu/ipa/planning.htm>





Lessons Learned

- Leadership counts
- Consultation and participation count at least as much – involve faculty and staff who will carry out the plan
- Promote a shared framework, values, principles together with institutional flexibility
- Limit the number of planning issues
- Make planning outcomes explicit
- Make process efficient and context-appropriate
- Change is slow – be patient and persistent