

# Strategic Planning Progress Report

January 2020



**Carleton**  
UNIVERSITY

Canada's Capital University

# Message from the Co-Chairs

Since the Strategic Integrated Planning (SIP) Task Force was formed in September 2019, we have been engaging the Carleton community in a broad and consultative process towards developing Carleton's next Strategic Integrated Plan.

We have been impressed by our community's willingness and enthusiasm to participate and contribute feedback and ideas through in-person consultations and online through the SIP website.

With the help of a strong and engaged task force, and the facilitation expertise of the Office of Quality Initiatives, we hosted more than 50 consultations. In the initial Open Consultation Phase, we had more than 1,000 conversations with faculty, staff, students, community partners and alumni members about Carleton's strengths and vision for the future.

Armed with this substantial input, we moved into the Themed Consultation Phase. In this phase, we engaged the Carleton community again through specific conversations about particular themes that emerged from the Open Consultation Phase.

We are pleased to share this report with you to provide an overview of the process and a summary of what we heard.

On behalf of the SIP Task Force, we thank you for your engagement in this important process and we look forward to your feedback on the draft plan in the spring.

Sincerely,

## **Lorraine Dyke**

Co-Chair, Strategic Integrated Planning Task Force  
Deputy Provost (Academic Operations and Planning)

## **Betina Appel Kuzmarov**

Co-Chair, Strategic Integrated Planning Task Force  
Clerk of Senate

## **Patrice Smith**

Co-Chair, Strategic Integrated Planning Task Force  
Dean, Faculty of Graduate and Postdoctoral Affairs

## **Cindy Taylor**

Co-Chair, Strategic Integrated Planning Task Force  
Assistant Vice-President, Human Resources



**Strategic Integrated Planning Task Force Co-Chairs**  
(left to right): Cindy Taylor, Betina Appel Kuzmarov, Lorraine Dyke and Patrice Smith.

# SIP Task Force Membership

An open call resulted in almost 70 nominations for the SIP Task Force. Members were chosen to create a Task Force that is broadly representative of the Carleton community. Representation includes members of faculty, staff and student bodies.

- **Abdulwahab Al-Haimi**, Student, Bachelor of Sustainable and Renewable Energy Engineering
- **Greg Aulenback**, Director, Strategic Initiatives, Office of the Vice-President (Students and Enrolment)
- **Trish Ballamingie**, Associate Professor, Department of Geography and Environmental Studies, Faculty of Arts and Social Sciences
- **Adrian Chan**, Professor, Department of Systems and Computer Engineering, Faculty of Engineering and Design
- **Michael Charles**, University Advisor on Equity and Director, Equity and Inclusive Communities
- **Steven Cooke**, Professor, Department of Biology, Faculty of Science
- **Ryan Davies**, Director, Advancement Strategy and Brand, Department of University Advancement
- **Scott Gonsalves**, Manager, Strategy and Quality, Sprott School of Business
- **Emily Grant**, Student, Master of Political Management, Faculty of Public Affairs
- **Jordan Gray**, Student, Bachelor of Global and International Studies, Faculty of Public Affairs
- **Jaymie Koroluk**, Assistant Director, Educational Development Centre, Teaching and Learning Services
- **Catherine Kitts**, Recruitment Communications Officer, Undergraduate Recruitment Office
- **Pauline Rankin**, Dean, Faculty of Arts and Social Sciences; Professor, School of Indigenous and Canadian Studies
- **Philip Mansfield**, Manager, Sustainability Programs, Facilities Management and Planning
- **Patricia McGuire**, Assistant Professor, School of Social Work, Faculty of Public Affairs
- **Benny Michaud**, Assistant Director, Equity and Inclusive Communities
- **Laura Newton Miller**, Assessment and Collection Strategy Librarian, MacOdrum Library
- **Dan Rubinstein**, Senior Writer, Department of University Communications
- **Murray Sang**, Contract Instructor, Sprott School of Business
- **Karen Schwartz**, Associate Vice-President (Research and International); Professor, School of Social Work, Faculty of Public Affairs

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## Task Force Support

- **Nancy Arnold**, Director, Office of Quality Initiatives
- **Rebecca Drodge**, Strategic Integrated Planning Task Force Assistant and Events Coordinator, Office of the Deputy Provost (Academic Operations and Planning)
- **Rosemary O'Hearn**, Executive Assistant to the Provost and Vice-President (Academic)
- **Sandra Slater**, Executive Assistant to the President
- **Jane van den Dries**, Communications Officer, Office of the Provost and Vice-President (Academic)

# The Process

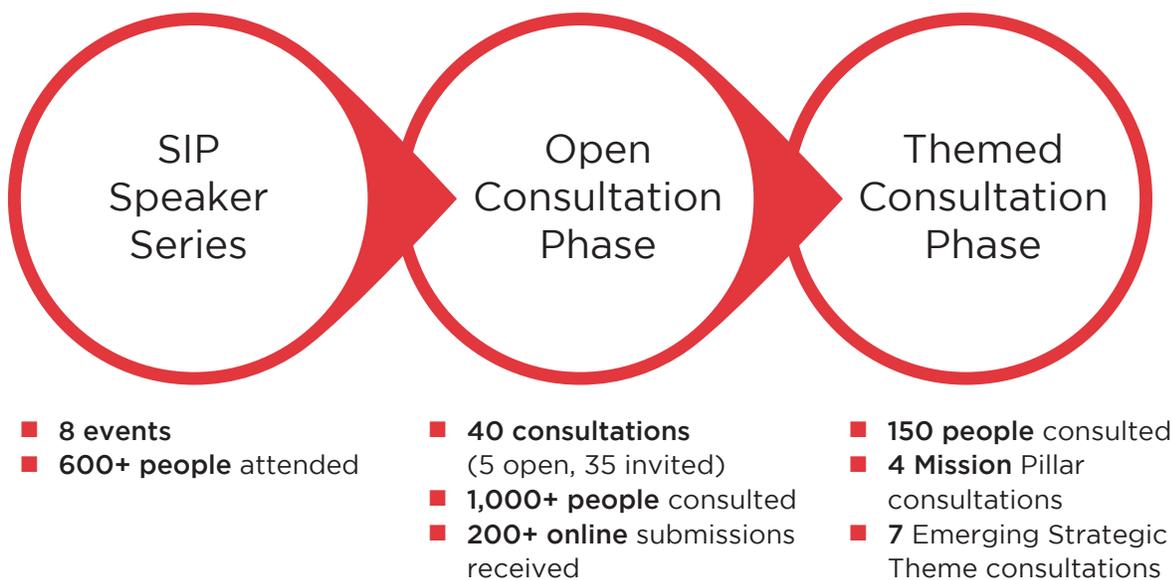
A campus-wide event on September 5, 2019 marked the official launch of Carleton University's strategic planning process. About 250 people attended "Carleton's Strategy: The Next Chapter," where the Strategic Integrated Plan (SIP) Task Force Co-Chairs introduced the planning process Carleton will undertake. The launch event featured a keynote by higher education expert and futurist Ken Steele.



**“Planning matters and over time the strategies we develop become our reality. We are starting on a journey that will plant the seeds of our future successes.”**

— Carleton President Benoit-Antoine Bacon

This event inaugurated the Strategic Planning Speaker Series, which brought 13 dynamic guest speakers to campus to deliver presentations and start conversations intended to spark our creativity and inform our vision of the future. The series prompted members of the Carleton community to think strategically about significant topics related to higher education.



# Strategic Planning Speaker Series

Over eight weeks, more than 600 people attended eight speaker events and heard from 13 experts on various topics.

Sept. 5

## Thinking Forward: The Road Ahead for Higher Ed

**Ken Steele**, *higher education market research analyst and brand consultant*

Higher education is under growing pressure to evolve to meet changing needs and expectations from society, government, our students, and the labour market of the so-called “fourth industrial revolution.”

To survive and thrive, universities will need to be more nimble, entrepreneurial, and innovative than ever – including embracing new technologies to facilitate learning and the student experience.

Sept. 9

## A Global Perspective on Universities

**Karen Dalkie**, *Vice President, Development and Partnerships, Canadian Bureau for International Education*; **Paul Davidson**, *President, Universities Canada*; **Greg Moran**, *Executive Director, Academics Without Borders*

Now more than ever, international researchers are collaborating on pressing issues to address societal and global challenges. With the growth of international students in Canada and an increasing need for graduates to develop cultural competency, universities must adopt a global perspective in order to prepare students for success as global citizens.

Sept. 19

## The Reputation Research Report

**Pam Ward**, *Principal, The Strategic Counsel*

Earlier this year, Carleton engaged The Strategic Counsel, a leading market research firm, to undertake a comprehensive research project to better understand public perceptions of the university. Some of the preliminary results of the project were shared with the Carleton community during this session.

Oct. 3

## Disruptive Technologies and Key Skills for the Future

**Colette Lacroix**, *Industry Executive Higher Education and Research Canada, IBM Canada's Public Sector Division*

This session explored virtual reality, artificial intelligence and other disruptive technologies that will undoubtedly affect the workforce and the skills that are required of students in the future.

# Strategic Planning Speaker Series (continued)

Oct. 18

## Make Big Plans: Strategic Planning and University Transformation

**Sheldon Levy**, former President and Vice Chancellor, Ryerson University (2005-15) and former Ontario Deputy Minister of Advanced Education and Skills Development (2015-17)

Sheldon Levy shared his insights about university strategic planning and transformation. He emphasized the link between strategic planning and reputation. He advised us to think about a strategy that is bigger than the university.

Oct. 21

## The Research Enterprise

**Geneviève Tanguay**, Vice-President, Emerging Technologies, National Research Council Canada

This session explored the challenges and opportunities for research in a rapidly changing environment.

Oct. 28

## Innovative Pedagogy

**James Arvanitakis**, Pro Vice Chancellor (Research and Graduate Studies), Western Sydney University; **Peter Felton**, Executive Director of the Center for Engaged Learning and Assistant Provost for Teaching and Learning, Elon University; **Lindsay Morcom**, Canada Research Chair in Language Revitalization and Decolonizing Education, Queen's University

These panelists spoke about approaches such as creating citizen scholars, engaging peer learning and embracing indigenous pedagogy. The underlying theme was that good pedagogy is built on relationships.

Oct. 31

## Engaging Diverse Learners

**Sean Lyons**, Associate Dean, Research and Graduate Studies, Gordon S. Lang School of Business and Economics, University of Guelph; **Heather A. Smith**, Professor of Global and International Studies, University of Northern British Columbia

In this final speaker series event, two higher education leaders brought a wealth of knowledge and experience about understanding today's generation of learners and the importance of building spaces and processes that are inclusive of the student voice.

# Open Consultation Process

## Faculty and Staff Engagement

In this initial phase, the SIP Task Force engaged the Carleton community in discussions about Carleton's strengths and vision for the future. Over the course of 40 consultations, the SIP Task Force had more than 1,000 conversations. In addition, over 200 online submissions were received.

Consultations were facilitated with all divisions, specifically:

- All Faculty Boards
- MacOdrum Library
- Academic Heads Roundtable (Deans, Associate Deans, Directors)
- Strategic Integrated Planning Committee and Strategic Integrated Planning Task Force
- President's Division
- Provost and Vice-President (Academic) Division
- Research and International
- Students and Enrolment
- Finance and Administration

During the Open Consultation Phase, SIP Task Force also held:

- Five consultations that were open to all members of the Carleton community
- Eight invited consultations with departments across the university to accommodate requests for consultations with specific units

## Student Engagement

The SIP Task Force includes three student representatives, who collaborated with the Co-Chairs to develop a communications strategy for student engagement and outreach in the consultation process. As a result, the SIP Task Force received close to 200 online submissions from students through an online form and through Instagram. Although some students attended the campus-wide consultations, the SIP Task Force held two additional student-specific consultations. The SIP Task Force Co-Chairs invited Student Government Leaders to a special consultation, and the SIP Task Force student members facilitated a second consultation event that was open to all Carleton students.

## Governance

In addition to providing updates on the SIP process and timeline, the SIP Task Force Co-Chairs held specific consultations with Senate and the Board of Governors.

## Other Stakeholder Engagement

The SIP Task Force also held consultations with executive members of Carleton's alumni and retiree committees, and also with select community partners.



### 3. What significant strengths could be built upon to differentiate Carleton?

- Caring community
- Accessible, diverse and inclusive
- Excellence in research and teaching
- Interdisciplinary and collaborative
- Innovative and nimble
- Our Capital location (High-Tech, Government)
- Our connections with community
- Leaders in sustainability
- Integrated solutions to problems
- Foundation of strong academic programs
- Technology
- Policy
- Wellness

In addition, students praised the high quality of instruction and student support.

### 4. Where do you see opportunities for Carleton to push its current boundaries?

- Tell our story, build our brand
- Increase community collaborations and partnerships (serve as a link for government and industry; capitalize on our connections with high tech and government)
- Strengthen interdisciplinarity further
- Serve Ottawa (leverage our location)
- Serve the world (build our international presence)
- Leverage our strength in sustainability
- Support non-traditional students (lifelong learning, lifelong relationships)
- Relevance to labour market

### 5. What do you want Carleton to be known for in 2030?

- Research excellence
- Transformative student experience and learning environment through living labs on campus and in the community (Education for Good; Employable graduates)
- Solving global issues and shaping the future through interdisciplinary knowledge sharing (address important problems like climate change)
- Sustainability
- Wellness
- Community engagement
- Most inclusive university
- Entrepreneurial mindset extended across campus
- Stronger presence in the community
- Excellent students and programs
- Helping Ottawa revive its story
- Collaboration
- An open and welcoming campus

In addition, students identified a number of specific programs for which they felt Carleton deserved recognition.

### 6. What kinds of changes are required to realize this future aspiration?

- Take risks
- Be bold
- Invest in the long term (invest strategically)
- Identify and communicate Carleton's differentiators externally (Tell our story boldly and in a coordinated fashion)
- Communicate the vision internally to support change (A strategic plan with a clear direction; a process that allows us to adapt quickly)
- Strengthen our partnerships (build partnerships; strengthen interdisciplinary connections)
- Create spaces that mirror our values (beautify the campus)
- Global engagement

# Themed Consultation Process

All of the input from the Open Consultation Phase was documented and shared with the SIP Task Force. The SIP Task Force engaged in a process of review and synthesis to identify the key themes that emerged. In reviewing the identified themes, it became apparent that they span two distinct categories: **Mission Pillars** and **Emerging Strategic Themes**.

**Mission Pillars** refer to the core activities of the university:



Success on these activities is critical to achieving our mission but these activities are not unique to Carleton.

The SIP Task Force held one consultation on each Mission Pillar and asked the following questions:

1. What makes Carleton uniquely capable of delivering on this pillar within each of the strategic themes?
2. What bold, aspirational goals could Carleton aim to achieve 10 years from now on this pillar if we adopted each of these themes as our strategic direction?
3. What transformational actions would be necessary to achieve these mission pillar goals?

**Emerging Strategic Themes** are ideas we heard from the campus community about how we can leverage our strengths and distinctive campus character to create a unique vision of Carleton's future. The Emerging Strategic Themes are ideas that can be applied across the Mission Pillars. They represent alternative visions of what Carleton could become. Although the themes will evolve as we develop these ideas further, the remainder of the Themed Consultation Phase was structured around the eight preliminary Emerging Strategic Themes that are listed here in no particular order.

The SIP Task Force hosted one consultation on each of the Emerging Strategic Themes and asked the following questions:

1. How can Carleton build on its strengths in this theme?
2. What bold idea related to this theme could Carleton implement that would put our university on the map?
3. What else should we consider in this theme to support the Mission Pillars (Research; Teaching and Learning; Student Experience; Organizational Excellence)?

On the recommendation of the Carleton University Indigenous Strategic Initiatives Committee (CUISIC), consultation for the Emerging Strategic Theme of Indigenous Initiatives was integrated with the work of CUISIC. Over the past year, CUISIC has conducted more than 40 consultations — on campus and off — that included more than 450 people. Based on this feedback, CUISIC published a set of 41 draft Carleton-specific Calls to Action as part of an institutional response to the recommendations of the Truth and Reconciliation Commission.

## Emerging Strategic Directions

Leadership in Sustainability

Healthy Environments

Internationalization

Campus-Community Engagement

Real-World/Social Impact Beyond Disciplinary Boundaries

Innovation

Access, Equity, Diversity, Inclusion

Indigenous Initiatives

# Themed Consultation Summary

## Leadership in Sustainability

Carleton has demonstrated strong leadership and made significant progress towards improving the sustainability of its operations, offering innovative programs, and engaging in timely and relevant research.

### What we Heard

- Carleton has been recognized as a leader in sustainability, but further integration of sustainability is needed
- Campus community is passionate about sustainability; students are engaging in social activism
- This theme is linked to interdisciplinarity and community partnerships

### Ideas

- Use sustainability as a lens through which all decisions are made
- Build a re-use hub
- Support electric cars and/or scooters
- Build on-campus housing to reduce commuting

## Healthy Environments

The term “Healthy Environments” includes all of Carleton’s environments: our physical campus and environment, our culture and social environment, and the personal and professional environments that we create and foster for our communities on campus.

### What we Heard

- Relevant strengths at Carleton include the mental health framework, therapy dogs, a compassionate culture, recent Excellence Canada Gold award in mental health
- We need to find ways to reduce personal stressors (e.g., streamline administration for researchers, sharing course development work among instructors)

### Ideas

- Develop a Wellness Hub
- Create spaces that support interaction
- Focus on the patient side of health care

## Internationalization

Carleton has a long history of strong international student enrolment. Internationalization encompasses the international students Carleton hosts, the international opportunities provided to Carleton students and the strategic partnerships Carleton pursues.

### What we Heard

- Carleton is supported in this theme by its capital location, proximity to embassies and current partnerships
- This theme links to community-campus engagement

### Ideas

- Build a campus abroad
- Provide funding for students to go abroad
- Expand language offerings
- Offer cross-cultural training

## Campus-Community Engagement

Carleton works with partners across the communities that we serve to our mutual benefit. This theme encompasses local, national and international partnerships with the non-profit sector, government and business.

### What we Heard

- Carleton is well positioned to build on this theme due to its location, existing relationships, founding history, applied research focus, experiential learning and the Carleton Dominion-Chalmers Centre
- This theme links to the real-world/social impact and internationalization themes
- We can help Ottawa revive its story
- proximity to government and technology sector

### Ideas

- Create a central office to coordinate community engagement
- Change Carleton's structure to facilitate community engagement
- Build hubs where campus and community can work together
- Provide seed funding

## Real-World/Social Impact Beyond Disciplinary Boundaries

The Carleton community is comprised of collaborative leaders who can address societal issues to have meaningful, real-world impact in an increasingly complex environment.

### What we Heard

- This theme is well suited to Carleton because of its location, interdisciplinarity, experiential learning, flexible degrees and concern for social issues
- Linked to community-campus engagement, innovation and sustainability
- This theme could be viewed as a unique theme or as an outcome of community engagement
- Leverage expertise in policy and proximity to government

### Ideas

- Reorganize Carleton to break down disciplinary barriers
- Create spaces that facilitate collaboration
- Invest in partnership development
- Measure and reward social impact
- Align ourselves with the United Nation's Sustainable Development Goals

## Innovation

Many types of innovation could occur — and are already occurring — in areas across Carleton: innovative services, programs, student experience, research and more.

### What we Heard

- Carleton has been very innovative and has strengths in entrepreneurship
- This theme links to community-campus engagement and real-world/social impact
- Innovation could be seen as a goal in itself or the way in which we do things. For instance, we could consider all research as innovation.

### Ideas

- Build satellite campuses
- Lead in the use of Blockchain technology
- Expand the Shopify model
- Forge stronger connections with the local information technology and communications industry

## Access, Equity, Diversity, Inclusion

Carleton has an extensive and dynamic history of making its campus and courses increasingly accessible to students with disabilities and is committed to being the most accessible campus in Canada. Carleton also fosters the development of an inclusive and transformational university culture where individual distinctiveness and a sense of belonging drive excellence in learning, research, teaching and working.

### What we Heard

- This theme emerged due to Carleton's inclusive culture; Research, Education, Accessibility and Design initiative; Paul Menton Centre; tunnels; and leadership of the Canadian Accessibility Network
- This theme is linked to internationalization
- A goal for 2030 would be that we are not talking about this anymore because we have been successful in incorporating Equity, Diversity and Inclusion

### Ideas

- Create an Ability Centre
- Integrate into curriculum
- Offer related programs and training (micro-credentials)
- Integrate into our communications plan

## Indigenous Initiatives

This theme incorporates the work of the Carleton University Indigenous Strategic Initiatives Committee (CUISIC). Over the past year, CUISIC has engaged over 450 people in conversations about how Carleton can support the recommendations of the Truth and Reconciliation Commission.

### What we Heard

- Carleton's advantages here include its capital location and the work of the Carleton University Indigenous Strategic Initiatives Committee (CUISIC)
- This theme is linked to the Access, Equity, Diversity and Inclusion theme

### Ideas

- Implement the calls to action published by CUISIC
- Create an institute for indigenous research
- Build a log house to house Indigenous projects
- Forge international linkages around Indigenous issues
- Employ elders in residence

# Next Steps

The input provided by the campus community includes a great many ideas about possible futures for Carleton. As the Task Force has worked with these ideas, many linkages have been identified. The Task Force will integrate these ideas into the core concepts underlying the plan for Carleton's next chapter.

The draft plan will be written in January 2020. In February and March, the Carleton community will be asked to provide feedback on the draft plan. Presentation and approval by the Senate and Board of Governors will take place in May and June 2020.

## Timeline

