SPAG Relationships and Role

Executive Leadership Team

Strategic Plan Advisory Group

Community

Leading and decision-making

Recommending, advising, and tracking

Campus collaboration to enable and support priorities

Inputs

Outputs

Introduction

In May 2013, President G.P. “Bud” Peterson directed Provost Rafael L. Bras to lead the institutionalization of the Institute Strategic Plan following its release in August 2010 and initial implementation phase. For this, a small group of faculty, staff, and students was formed to assume some of the responsibility for continuing the initial momentum. The purpose of this Strategic Plan Advisory Group (SPAG) is to serve as a catalyst for the discussion of strategic issues; to provide counsel to Institute leadership on the alignment, effectiveness, and impact of the Strategic Plan; and to develop approaches to best engage the Institute community in this effort.

“We have made a great deal of progress toward the goals articulated in the original document,” Provost Bras said. “Yet the notion of what constitutes the ‘Technological Research University of the 21st Century’ continues to evolve. For example, four years ago very few were talking about massive open online education, but it is now one of the foremost topics in higher education. We are looking to this advisory group to help ensure that our aim is true.”

The current members of the Strategic Plan Advisory Group are:

- **Gisele Bennett**, Director, Electro-Optical Systems Laboratory
- **Michael Best**, Associate Professor, International Affairs and Computing
- **Daisy Bourassa**, Graduate Student, Chemistry and Biochemistry
- **Laura Margaret Burbach**, Undergraduate Student, Public Policy
- **Kim Cobb**, Associate Professor, Earth and Atmospheric Sciences
- **Mark Demyanek**, Assistant Vice President, Operations and Maintenance
- **Jim Fortner**, Associate Vice President, Financial Services
- **David Frost**, Professor, Civil and Environmental Engineering
- **Lisa Grovenstein**, Assistant Vice President, Institute Communications
- **George Riley**, Professor, Electrical and Computer Engineering

Specific responsibilities for the group have included reviewing the Strategic Plan implementation activities to date, identifying gaps, creating transparent processes and timelines for new initiative consideration, recommending resource needs, and communicating progress to the campus community.

Strategic Plan Ecosystem

Based on discussions between SPAG members and campus leadership, as well as questions from members of the campus community about the relationships between the Institute’s Strategic Plan and unit-level planning, SPAG began to view this collective effort as the Georgia Tech Strategic Planning Ecosystem. The vision for this ecosystem is that while each entity may have its own plan to develop, it is the compatibility of these plans — and the manner in which they support, complement, and leverage one another — that produces a truly creative and innovative environment at Georgia Tech.

Reviewing the Plan

Significant effort was devoted during the 2013-2014 academic year by SPAG members to a series of activities aimed at developing a status update of the Strategic Plan as a whole as well as the accomplishments of various initiatives undertaken during the initial implementation period. This involved extensive review of documents as well as meetings between one or more SPAG members and campus leadership (deans, associate deans, vice presidents, and associate vice presidents) and initiative leadership (project leads, project co-leads, and project champions). The input received from all these individuals was particularly valuable in identifying what aspects of the Strategic
Plan implementation were working well and what elements needed enhancement.

SPAG made a number of core recommendations as a foundation for the path forward in November 2013. It was considered timely to review the high-level elements of the plan, even though it had been released in 2010. On the basis of this review, SPAG recommended that the original vision, mission, and goals remain unchanged. At the same time, a few changes were proposed to some of the original objectives to help clarify intent or reflect new areas of emphasis. To review the modified objectives, along with the reaffirmed vision, mission, and goals, see below.

Current Strategic Plan Initiative Synthesis

During the initial Strategic Plan implementation phase (2010 - 2013), a range of initiatives was selected out of more than 100 initiative proposals submitted to Institute leadership for consideration. Additional initiatives were identified in the ensuing years. As a result, during the initial three-year implementation period, some initiatives achieved most — if not all — of what was anticipated, while others achieved success to the degree that available resources permitted.

One of the initial activities undertaken by SPAG was to conduct an inventory of all projects and ascertain which ones might reasonably be expected to form the core group of projects moving forward in the institutionalization phase of the Strategic Plan. For this, SPAG members reviewed available documentation and met with project leads/co-leads and champions as well as members of the Institute leadership (deans/associate deans/VPs/associate VPs) to solicit input on the status of all initiatives.

In conducting the initiative inventory exercise, it became apparent that a number of important enhancements could be made in the institutionalization phase of the Strategic Plan in terms of the project portfolio. In particular, the project
inventory review exercise revealed that natural variations in both the scale and required time of the projects led to challenges in managing and supporting them. To this end, SPAG proposed that henceforth, both the existing portfolio of core projects as well as any new projects would be designated as a “program,” a “project,” or a “pilot” as a function of a number of factors. The advantage of implementing such a structure was not just to create three sub-groups of projects, but also to enhance communications between perhaps a new pilot or project and an existing project or program. Further, the attributes by which an initiative might be designated as a program, a project, or a pilot are summarized below, and include considerations ranging from effort level required, structure available to support, anticipated duration, likely investment levels needed, and potential benefits. The criteria associated with each attribute are intended as guidelines only and not as rigid factors. Final assignment of existing projects as a program, project, or pilot for future investment will occur with involvement from the project leads/co-leads.

### New Strategic Plan Process and Timeline

Given the importance of resource allocation to the success of many Strategic Plan projects, it was critically important that SPAG develop an annual process and timeline — linked to the Institute Budget Planning and Allocation cycle — for continuing and new Strategic Plan programs, projects, and pilots. At the same time, SPAG sought to develop a process that was efficient in terms of documentation and engaged

### Attributes of Programs, Projects, and Pilots

<table>
<thead>
<tr>
<th>Programs</th>
<th>Projects</th>
<th>Pilots</th>
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</thead>
<tbody>
<tr>
<td><strong>Structure</strong></td>
<td>Greater level of uncertainty</td>
<td>Well-defined</td>
</tr>
<tr>
<td></td>
<td>Larger team</td>
<td>Smaller team</td>
</tr>
<tr>
<td></td>
<td>May have number of projects and pilots linked to it</td>
<td>May have a pilot linked to it</td>
</tr>
<tr>
<td><strong>Effort</strong></td>
<td>Collection of complementary and interdependent projects</td>
<td>Represents single effort</td>
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<tr>
<td></td>
<td>Cohesive package of work</td>
<td>Team with common goal</td>
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<tr>
<td><strong>Duration</strong></td>
<td>Longer duration (multi-year)</td>
<td>Shorter duration (1 - 2 years)</td>
</tr>
<tr>
<td></td>
<td>May be divided into phases</td>
<td></td>
</tr>
<tr>
<td><strong>Benefits</strong></td>
<td>Working toward delivering outcomes</td>
<td>Working toward achieving specific outputs</td>
</tr>
<tr>
<td></td>
<td>Result may be policy or cultural change</td>
<td>Benefits tend to be tangible</td>
</tr>
<tr>
<td><strong>Likely Investment Levels</strong></td>
<td>$&gt; 500K</td>
<td>Between $25K - $500K</td>
</tr>
<tr>
<td></td>
<td>Likely a combination of State, Institute, external sponsor, and development resources</td>
<td>Likely a combination of Institute, external sponsor, and development resources</td>
</tr>
<tr>
<td><strong>Common Attributes</strong></td>
<td>Temporary</td>
<td>Temporary</td>
</tr>
<tr>
<td></td>
<td>Have a business case</td>
<td>Have a business case</td>
</tr>
<tr>
<td></td>
<td>Aligned with strategic objectives</td>
<td>Aligned with strategic objectives</td>
</tr>
<tr>
<td></td>
<td>Deliver change</td>
<td>Deliver change</td>
</tr>
</tbody>
</table>
appropriate administrative levels. The new SPAG process is intended to encourage collaborative discussion involving individuals or groups proposing ideas. SPAG will play a facilitation role and will work to create connections between new ideas and existing initiatives. SPAG will seek to provide access to at least three primary currencies for idea proposers: resources, connections, and visibility.

In addition to the process and timeline, SPAG also sought to leverage existing institutional culture and procedures to help enhance the level of engagement embedded in the

Strategic Plan program/project/pilot selection and support process. For example, a new form called the Strategic Plan Commitment Form is modeled on the well-established Proposal Cost Share Form, currently used when faculty are submitting proposals to external funding agencies that require institutional matching funds. In a similar manner, it is expected that the Strategic Plan Commitment Form will catalyze communication between various levels of leadership as they determine individual and collective levels of interest and support.

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**SPAG Process**

**Note:**
1. Strategic Plan Program/Project/Pilot Online Idea Form
2. Strategic Plan Proposal Form including Strategic Plan Commitment Form
3. SPAG Evaluation and Recommended Metrics Form
4. SPAG Periodic Metrics Review Form
Evaluating Our Progress

One of the ongoing activities of SPAG is to identify an approach to measure the impact of Strategic Plan goals, objectives, and initiatives. For assistance, SPAG has partnered with the Strategic Consulting Group to conduct a series of charrettes, engaging a broader group of individuals who are routinely involved in both gathering and evaluating data to support institutional planning and decision-making efforts. The intent is to identify a core set of metrics for Strategic Plan goals and objectives and then engage with existing programs, projects, and pilots leaders/co-leaders to discuss what metrics they consider appropriate for their initiatives. For future initiatives, identification of appropriate metrics/measures will be part of the concept proposal and evaluation process.

SPAG Annual Process Timeline — 2014 and Beyond

Communications
- New Idea Solicitation
- SP Stories and Updates
- SP New and Renewal

Development
- Development

ELT
- ELT New Idea Review & Decision
- ELT Renewal Review & Decision

SPAG
- SPAG New Idea Interview, Review & Decision
- SPAG Renewal Review & Decision

PIs and Co-PIs
- New Idea Intake
- Report and/or Renewal Request Intake
Examples of Implementation

The Innovation and Design Collaborative

Under the leadership of Jim Budd (Industrial Design) and Bill Wepfer (Mechanical Engineering), and with a combination of initial investments from Institute, College, and School resources as well as subsequent significant external philanthropy, the Innovation and Design Collaborative (IDC) has gone from a concept exploring how to innovatively integrate interdisciplinary design experiences to a reality involving an engaged group of faculty, students, and staff. IDC incorporates a range of elements in various stages of maturity including interdisciplinary curricula, a design resource inventory, an idea incubator, and a communications portal. The IDC opened its doors in the East Wing of the Library in fall 2013 with the appointment of Wayne Li as the first James L. Oliver II Professor of the Practice in Design and Engineering and first director of the IDC initiative. The IDC continues to evolve as a vehicle to encourage and enable students to develop their creativity and passion for design and innovation.

The Family-Friendly Initiative

To help Georgia Tech continue to grow, not just as a place to do great research and teaching but also as “a great place to work,” a task force under the leadership of Scott Morris (AVP/Human Resources) and Archie Ervin (VP/Institute Diversity) was charged with assessing Tech’s environment, developing an inventory of existing programs supportive of family-centered activities, and identifying opportunities for improvement. They identified seven focus areas for future investment and enhancement. Specific actions to advance these focus areas were identified and are now being pursued with support from a variety of sources across campus.