



ANNUAL STRATEGIC PLAN UPDATE: NOVEMBER 2007

Emory: A destination university internationally recognized as an inquiry-driven, ethically engaged, and diverse community, whose members work collaboratively for positive transformation in the world through courageous leadership in teaching, research, scholarship, health care, and social action.

In the year that has elapsed since the first *Annual Strategic Plan Update* (November, 2006) was presented to Emory's Board of Trustees, Emory University has made significant progress in implementing its strategic plan through the accomplishments of its students, faculty, and staff. Emory students are increasingly engaged in scholarship and community service, its faculty members continue to excel in teaching and research, and its programs and partnerships are positively impacting the world and garnering national and international recognition. Here are a few highlights:

- His Holiness the Dalai Lama was named Presidential Distinguished Professor, the culmination of 15 years consulting and planning to bring together two great intellectual traditions; Phillis Wheatley Distinguished Chair of Poetry Natasha Trethewey won the Pulitzer Prize for *Native Guard*; and Salman Rushdie returned as Distinguished Writer in Residence.
- Undergraduate Zachary Manfredi was named a 2007 Rhodes Scholar and Aimi Hamraie and Julie Hoehn became the first all-female team to win the National Debate Tournament.
- Emory launched its new Emory Advantage financial aid program designed to reduce undergraduate student debt (particularly for middle class families) and undergraduate student admissions continued to become increasingly selective (27% of applicants admitted for fall, 2007, down from 32% for the previous fall).
- A report based on a series of faculty interviews conducted by the Office of the Provost concluded the "Year of the Faculty." The report underscores the importance of retaining and recruiting excellent, distinct, and diverse faculty in the face of the expected national trend of increasing retirements over the next ten years.
- The new School of Medicine building opened, the first "green" residence hall opened as part of initiatives to enrich the freshman experience, and construction was initiated for the School of Theology and Department of Psychology, with the Emory Clinic and mixed use development on Clifton Road on the near horizon.
- The Center for Health Discovery and Well Being opened at the Crawford Long campus as part of the Predictive Health and Society strategic initiative, while other strategic initiatives such as the Global Health Initiative continued forging crosscutting partnerships aimed at understanding and solving societal challenges.

As a community, Emory has embarked on a long road to achieve its vision of becoming a destination university of international reputation. As President Wagner has noted, this journey requires a "strategic discipline" that may sometimes test our "patience, persistence, and determination." Moving forward in implementing the strategic plan will require openness to opportunity, flexibility, and commitment to fiscal responsibility. Potential challenges include federal budget fluctuations, increasing competition from benchmark universities for students and faculty, rising tuition costs and competing financial aid packages for middle class families, expected increases in the number of



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faculty who retire, increasing government oversight and assessment of learning and research outcomes, rising healthcare costs and related legislation, and the growing emphasis on environmental stewardship, local community involvement, and campus security. In addition, the fiscal and political uncertainty surrounding the future of Grady Health System poses a serious threat that could reverberate through the entire Emory community.

The following report reflects these challenges as it describes accomplishments, priorities, and data that help us assess where we have been and where we are going as we move forward in implementing Emory's dynamic strategic plan. We revisit the components of the plan, describe the process and mechanisms established to enact and track implementation, highlight the progress of the schools/units and themes/initiatives through the *Implementation Status Report* and outline the strategic implementation process, concluding with some general priorities for the upcoming academic year.

TRACKING THE STRATEGIC PLAN

Last year's *Annual Strategic Plan Update* (November, 2006) presented the *Implementation Status Report*. This tool was updated for this report and are provided in the section. The *Implementation Status Report* highlights the progress achieved by the various schools, units, and strategic themes and initiatives in accomplishing their strategic goals as well as Emory's university-wide goals.

Emory's strategic plan, *Where Courageous Inquiry Leads*, lays out a blueprint for achieving its vision as a destination university for 2005 to 2015. The four university-wide goals are to ensure that:

- Emory has a world-class, diverse faculty that establishes and sustains preeminent learning, research, scholarship, and service programs;
- Emory enrolls the best and brightest undergraduate and graduate students and provides exemplary support for them to achieve success;
- Emory's social and physical environment enriches the intellectual work and lives of faculty, students, and staff; and
- Emory is recognized as a place where engaged scholars come together in a strong and vital community to confront the human condition and experience and explore twenty-first century frontiers in science and technology.

The plan supports these four university-wide strategic goals as well as those of the individual schools and units, the five crosscutting university-wide themes and their related initiatives, and the four implementation strategies. Emory has now completed the second year of the implementation phase of the 2005-2015 Strategic Plan. The University's schools and major units have committed people and resources toward achieving these strategic goals.

The Implementation Status Report

The *Implementation Status Report* (section two of this report) presents the top accomplishments for FY 2007 and priorities for FY 2008 of the five strategic themes, the four implementation strategies,



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and major schools and operating units as noted below. While the *Status Report* highlights many school and unit programs related to the University strategic plan, it does not attempt to fully capture the many accomplishments and initiatives across the entire University. The report will continue to be updated annually.

The *first three themes* aim at strengthening our most vital resources – faculty, students, staff, and alumni.

- *Strengthening Faculty Distinction*
- *Preparing Engaged Scholars*
- *Creating Community-Engaging Society* (also described in more detail at the end).

Themes four and five represent areas of scholarship designed to leverage Emory's unique academic strengths that cut across the humanities, the social and natural sciences, the health sciences, and professional schools. Each of the two content areas is subdivided into three initiatives (also described individually at the end of the *Implementation Status Report* section).

- *Confronting The Human Condition And Human Experience*
 - *Understanding Religions and the Human Spirit*
 - *Implementing Pathways to Global Health*
 - *Understanding Race and Difference*
- *Exploring New Frontiers In Science And Technology*
 - *Neuroscience, Human Nature, And Society*
 - *Predictive Health and Society*
 - *Computational and Life Sciences*

Four implementation strategies represent *institutional practices* designed to support the activities, plans, and programs throughout the University and enhance how Emory connects to the wider community and society. These strategies are:

- *Internationalization*
- *Institute for Advanced Policy Solutions*
- *Creativity and the Arts*
- *Strategic Alliances*

Highlights of accomplishments and priorities of the following schools and operating units are also described in the *Implementation Status Report*.

- *Graduate School*
- *Emory College*
- *Oxford College*
- *Candler School of Theology*
- *Rollins School of Public Health*
- *Nell Hodgson Woodruff School of Nursing*
- *Yerkes National Primate Center*
- *Emory Healthcare*



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- *Law School*
- *Goizueta Business School*
- *School of Medicine*
- *University Libraries*
- *Michael C. Carlos Museum*
- *Campus Life*

Finally, although outside the scope of this report, the Campus Master Facility Plan and the Comprehensive Campaign provide resources that enable Emory to successfully implement the goals and vision of the strategic plan.

STRATEGIC IMPLEMENTATION PROCESS

Following the development of its comprehensive strategic plan, Emory had begun to put in place the processes to successfully realize the plan. An advisory committee consisting of university leaders met throughout fiscal years 2006 and 2007, developing priorities, reviewing achievements, and guiding strategic implementation activities (particularly those of the crosscutting themes and initiatives). This committee, the *Strategic Implementation Advisory Committee* (SIAC), is comprised of President's Cabinet members, Deans from across the University, and strategic plan theme leaders.

The SIAC continues to meet every other month to review progress or proposed key changes in the strategic plans of the schools, major units, and themes. SIAC's Executive Committee [Provost Earl Lewis, Executive Vice-President of Health Affairs Fred Sanfilippo {replacing Mike Johns beginning October 1, 2007}, and Executive Vice-President of Finance and Administration Mike Mandl] sets the agenda of the committee's work and facilitates communication with other key structures, such as the President's Cabinet and the Ways and Means Committee. Over the past year, a diagnostic assessment of the cross-disciplinary strategic initiatives and their implementation progress was conducted. As a result, a set of recommendations was created to improve communication, address current challenges, and create linkages among the schools and the initiatives of the plan.

A process of coordination and linkage to budgets and programs supports the strategic agenda and undergirds the implementation activities. The strategic management process includes linking implementation activities to current processes, developing and managing ways to monitor implementation progress for the University and for the schools and units, aligning strategic plan implementation across its various components, providing a central repository of resources and information, and helping develop ways to communicate progress and new developments. A committee known as the *Implementation Support Team*, comprised of associate deans and other senior administrators, meets after the SIAC meetings to help coordinate strategic implementation with operations and annual reporting across schools, units, and strategic themes and initiatives.

MOVING FORWARD

Key priorities for the University plan focus on both the implementation of university-wide priorities and school and unit priorities, as outlined in the Implementation Status Report. General school and unit priorities include recruitment of leaders and endowed chairs, finalizing plans for the capital campaign, redesigning the curriculum of key programs, and strengthening collaboration across schools. University-wide theme and initiative priorities include continued faculty recruitment,



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academic program development, and an ongoing focus on integration with school plans. Several key buildings will also be planned and initiated this coming year, such as the Psychology Building, Rollins School of Public Health expansion, facility upgrades at Oxford, and additional research space for the Medical School faculty. As the implementation of these strategies continues, we will continue to develop new organizational solutions, improve measures and indicators, and adjust goals and strategies as needed.