A. UPEI STRATEGIC PLAN
Introduction

The University of Prince Edward Island has a rich and vibrant history with roots in two founding institutions—Prince of Wales College and St. Dunstan's University. The University honours this proud legacy through a growing reputation for academic excellence, research innovation, community engagement, and service on local, national, and international levels.

UPEI has enjoyed numerous successes over the past decades. It is consistently ranked as one of Canada's top primarily undergraduate universities. It is home to an increasingly diverse student body, many talented educators (including five 3M National Teaching Fellows), a thriving research community (that includes more than a dozen funded research chairs and a prestigious Canada Excellence Research Chair in Aquatic Epidemiology), and a growing network of successful alumni.

Building on these strengths, UPEI is preparing for a future in which some of the challenges are unlike any previously encountered within post-secondary education. Changes in our fiscal environment, demographic shifts, increasing competition for students and resources, the need to better communicate the inherent value of a University education, and the provision of an educational experience for students who have been “electronically connected” since birth, all mean that UPEI must be more relevant and responsive than ever before. The significant challenges associated with higher learning budgets and changing expectations on the part of students, parents, labour markets, and governments clearly require transformational change to ensure the long-term health of UPEI.

The priorities outlined within the UPEI Strategic Plan are highly student-centred and focus on establishing effective processes. Collectively, these priorities will enable the University to achieve its vision by better meeting expectations and more fully differentiating and positioning itself within the post-secondary education landscape.

As with the development of UPEI's Strategic Plan, the implementation of planning priorities will be carried out in consultation and collaboration with the campus community and key external stakeholders who share our commitment to assist students in reaching their full potential in both the classroom and community.
UPEI’s Mission, Vision, and Values

Our Mission

The University of Prince Edward Island, founded on the tradition of liberal education, exists to encourage and assist people to acquire the skills, knowledge, and understanding necessary for critical and creative thinking, and thus prepare them to contribute to their own betterment, and that of society, through the development of their full potential. To accomplish these ends, the University is a community of scholars whose primary tasks are to teach and to learn, to engage in scholarship and research, and to offer service for the benefit of our Island and beyond.

Our Values

Accountability & Integrity
As individuals and as a community, we are accountable to those we serve, including our key partners, for the quality of education we deliver and the transparency of our operations. We will conduct ourselves with integrity, employing our expertise to serve others and benefit society.

Excellence
We aspire to excel in education, research, and service through an unwavering pursuit of the highest endeavours envisioned by our community of scholars.

Respect & Collegiality
Respect for self, others, and the process of discovery is the hallmark of our community. Through respect, collegiality, and reciprocity, we welcome the opportunity to exchange ideas and implement decisions.

Shared Responsibility
Through shared responsibility of faculty, staff, and students we are called to a duty of creating an enriched learning environment that fosters student success through engagement and experience.

Our Vision

The University of Prince Edward Island will be a leader in delivering outstanding experiential learning opportunities that encourage our students to develop to their full potential in both the classroom and the community. Driven by discovery, UPEI will be a destination for those eager to advance our world by creating new knowledge. Together, we will foster the development of tomorrow’s leaders who will emerge from their studies ready to excel and contribute to the betterment of our local and global communities.
**Student Experience**

Improve student learning and experiences by examining what—and how—we teach in support of UPEI’s vision of becoming a leader in experiential learning.

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**UPEI Strategic Priorities**

UPEI’s vision states that we will be "...a leader in delivering outstanding experiential learning opportunities that encourage our students to develop to their full potential in both the classroom and the community..." In support of this vision, the University will work to further enhance an experiential and active learning curriculum for students in all programs while promoting the value of existing and emerging modes of learning. In keeping with University processes, items under the purview of Senate will continue to go before Senate for approval.

Providing students with increasingly dynamic, relevant, and applicable learning opportunities lies at the heart of UPEI’s future direction and strategic planning. "How we teach and what we teach" is core to the student experience UPEI offers. It encourages the growth of our students while on campus, as well as their continued educational development and commitment to UPEI as alumni.
As a result, UPEI will work to:

- Increase effectiveness in the areas of student engagement, participation, and learning outcomes, reflective of students’ expectations for more academic and extra-curricular opportunities, coupled with a greater level of support and mentorship. Emphasis on academic innovation will be critical to all efforts to enrich the UPEI student experience.

- Increase student retention through integrated learning as well as programs and services encouraging student engagement.

- Explore ways to enhance academic staff interaction and increase interdisciplinary opportunities that provide students with access to dynamic academic offerings more closely tied to their aspirations.

- Promote the benefits of international and cultural experiences to add further value to the education of our students and their development as global citizens.

- Build programs that are highly experience-based and collaborative, such as the UPEI Engineering Design degree, that effectively engage our students with communities and real world issues.

- Develop initiatives (such as Student as Scholar) that encourage students to be not just consumers of knowledge, but active participants in knowledge generation and dissemination.

An outcomes-focused and annually evaluated UPEI Teaching Centre will be established to facilitate and encourage teaching and learning developments in support of our strategic priority to improve student learning and other experiences.
UPEI's mission, simply put, is to help our students achieve their personal and academic goals. To achieve this mission, we must deliver meaningful services and programs that build student engagement.

Academic staff interaction with students is a significant contributor to student experience and learning at UPEI. This interaction enriches students’ daily academic experience while building a love for continuous, lifelong learning. More avenues for students to communicate and interact with faculty and staff will be explored to promote opportunities for students to discuss their goals, concerns, and pathways for future success.

To provide students with tangible evidence of their learning experiences outside the classroom, UPEI will adopt a co-curricular transcript. Co-curricular transcripts will officially track students’ participation in and contributions to student life at UPEI including leadership roles, non-credit educational programs, and volunteer efforts. The creation of co-curricular transcripts will provide further support for UPEI students in their employment, scholarship, and graduate school pursuits.
UPEI will develop a fully integrated, single point of front-line support for students through a “one-stop shop.” This will improve service efficiencies while better meeting students’ expectations.

Emphasis will be placed on the development of student support strategies and increasingly effective pathways for various student groups, including Aboriginal students, to aid in better connecting, engaging, and retaining our student populations.

From welcoming students to PEI to helping them don their robes at graduation, comprehensive services play an important role in anchoring dynamic and rewarding experiences for international students. A sense of belonging and feeling welcome on our campus lends to the growth and success of our international students, and the extent to which they view UPEI and our province as their “home away from home.” These services are critical to UPEI’s efforts to increase international student enrolment and engagement.

UPEI’s implementation of an Enterprise Resource Planning (ERP) system during the Strategic Plan timeframe will contribute to better services by providing students, faculty, and staff with enhanced access to accurate, reliable, and timely data. ERP will also promote a new level of staff cross-training leading to further service improvements.

Campus business and information technology policies will also be reviewed in the context of enhanced service to ensure they are service gateways, rather than service barriers.
Vibrant Communities

Make UPEI a centre that fosters the development and growth of our people and the engagement of our communities

Job satisfaction and employee development have a direct impact on the quality of education and student experience we deliver. Recognizing this, UPEI will take a “back to basics” approach to develop employees on an individual basis while building more synergetic, effective teams overall.

The need for improved co-worker support and interaction was identified in the 2012 UPEI Employee Engagement Survey as an area requiring action and improvement. Although UPEI’s goal to complete Respectful Workplace Training by June 2013 has been achieved, this important issue will remain a priority. Ongoing training will take place to reinforce constructive relationships and uphold our University’s core values of Respect and Collegiality, Accountability and Integrity, and Shared Responsibility.

An Employee Development Plan will be created in collaboration with our employees to address supports and processes to enable people to carry out their responsibilities, with regard to human resources, to the best of their ability. The plan will also look closely at professional development, mentorship models for staff and faculty, training for people in supervisory roles, and processes to attract and retain high quality employees.
A strong sense of pride is a defining characteristic of outstanding communities and workplaces. UPEI wants to be known as a great employer. We also want to be recognized as a University with outstanding campus spirit that energizes and excites people. In the coming months and years, we will build a campus that is increasingly known for its vibrancy and abundant possibility. We realize that we cannot expect others to feel and demonstrate pride in UPEI unless we possess it—and consistently demonstrate it—ourselves.

There are many essential elements that contribute to "UPEI Pride," our sense of connectivity, and the value we place on UPEI's contributions to the world around us. These include: student engagement with academic staff and peers; the level of active and exciting dialogue taking place inside and outside our classrooms; employee support of (and participation in) campus initiatives; the ability to work together towards common goals; the ability to engage in healthy, productive debate; a strong and engaged alumni body; supporting and cheering on our athletic teams; and meaningful interactions with our communities.

Many positive ideas for campus engagement, pride building, and community interaction were submitted by UPEI employees and students through the Dare to Dream initiative. UPEI is committed to moving forward with a number of these ideas in an effort to enrich our campus life. A comprehensive internal communications strategy will be developed to improve how we communicate campus initiatives, share information, and celebrate our successes at UPEI.

A University Community Advisory Group comprised of representatives from across PEI will provide timely feedback and input into UPEI's community outreach activities. This group will play a valuable role in further building UPEI's meaningful linkages with our communities and in communicating UPEI initiatives and events.
Exploration and Discovery

Develop an increasingly integrated research culture that reaches further into our classrooms and communities

As a public university, UPEI has an obligation to contribute to improving the quality of lives in our community through the education we deliver and the research we conduct. Fundamental to any institution of higher learning is the ability to apply knowledge to real-world challenges, needs, and complex issues. Never has this been more relevant than now.

Funding agencies are clearly emphasizing their support of research that promises near-term impacts on local and regional economies. This funding focus requires an efficient and effective interface between University and private sector partners. If UPEI is to grow its research endeavours, it must align technology transfer with these new realities. Redefining the University’s technology transfer unit will demonstrate that UPEI is eager to expand and extend research through a more responsive model.

UPEI has an excellent track-record of research, scholarship, and creativity in a wide variety of fields. Our research endeavours have both near-term applications and long-range benefits, and contribute to the environmental, economic, social, and cultural landscapes of PEI and beyond. We will strive to enhance these research pursuits.
Our contributions to exploration and discovery will be supported by leveraging UPEI’s existing expertise in areas such as child and adolescent development, aquatic and veterinary epidemiology, and the history of medicine. At the same time, we will create new research programs and pursue opportunities to emerge as a leader in areas such as climate change and engineering. Facilitating opportunities for interdisciplinary research to further scholarship and the development of innovative and relevant programs will be a key to further evolving UPEI’s research program.

UPEI has demonstrated strong growth in its research and graduate programs over the past decade. The development of new focus areas, an increased commitment to collaborative and interdisciplinary approaches, enhanced graduate student supports, and new ways to recruit graduate students will be vital factors in garnering further success.

Introducing research to undergraduate students very early in their educational experience is a priority at UPEI. Through models such as Student as Scholar, UPEI will work to strengthen the relationship between research and undergraduate teaching to foster curiosity and create a richer education for all students.

As the research enterprise continues to develop at UPEI, a more integrated approach to research administration will be needed to meet the changing needs of academic staff and funding agencies. Providing more efficient grant application processes and personalized assistance to academic staff with respect to funding opportunities and applications will assist UPEI researchers’ grant funding competitiveness and success.
UPEI will demonstrate its commitment to fiscal, environmental, and cultural sustainability by managing resources in a responsible and accountable manner.

As of December 2013, the total number of students registered at UPEI was 4,335. This represents a 3.1 per cent decrease in students compared to the same date in 2012. To safeguard the long-term sustainability of UPEI, immediate and ongoing attention to enrolment is required. Student recruitment and retention will remain a top priority throughout the planning timeframe.

UPEI will develop an integrated culture in which all employees regard recruitment, retention, and student success to be central to their role. Our ability to better understand our prospective students and be more responsive to their expectations will be essential to growing our student population.

Recruitment strategies to increase enrolment (including attracting more students out of high school, more transfer students, and more international students) and improve retention will continue to be refined to address near-term challenges while a longer-term Strategic Enrolment Management (SEM) plan is developed.

SEM will be driven by our commitment to student success. Above all, we must continue to provide a compelling, challenging, and rewarding

**Long-term Sustainability**

*Achieve growth to ensure a thriving, sustainable future*
University education; an academic experience and campus environment that engage, invigorate, and transform in ways that ensure strong enrolments.

UPEI will establish a University-led program review cycle, one which will incorporate existing reviews into an integrated framework for undergraduate and graduate programs. This will support academic excellence and ongoing innovation that are required to remain competitive. The recent modification of UPEI's Bachelor of Education degree from a two-year program to a math and science focussed one-year program, provides an example of how Faculty led program review is able to directly address student expectations, as well as benefit graduates by making them more competitive within their profession. In addition to fostering program renewal, a review cycle will support the introduction of new and relevant programs—such as the proposed project-based and industry-linked Engineering degree program—that address new knowledge needs that occur as our world changes. This review cycle will include a broader Faculty review every five years.

To ensure resources are in place to achieve strategic academic goals, UPEI's Faculties and Schools will undertake the creation of new operating models based on SEM to address the fiscal realities facing the institution and decisions regarding campus planning.

UPEI's long-term financial sustainability—which is essential for the progress of our academic programs—will also depend greatly on our ability to mitigate risks associated with critical issues such as UPEI’s pension plan, enrolment challenges, reduced operating grants, and the need to secure additional funds through sources such as fundraising and ancillary services.

UPEI's fundraising goals will be realigned with UPEI's strategic priorities and changing campus needs. In addition, a comprehensive alumni engagement strategy will be developed to better inform and encourage alumni participation in areas ranging from recruitment to fundraising.

Initiatives will also be implemented to build UPEI's connectivity with our communities to ensure we clearly and consistently demonstrate the impact of UPEI's academic and research programs, and the University's contributions to the growth of our province and nation through learning partnerships, service to the community, cultural infrastructure, public dialogue, and public policy development.

Preserving our environment and the cultural richness, heritage, and diversity of our campus will remain a top concern as we endeavour to build a sustainable future.
**APPENDIX 1: Summary of Strategic Plan Priorities, Initiatives, and Accountability**

<table>
<thead>
<tr>
<th>PILLAR</th>
<th>STRATEGIC PRIORITY</th>
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<tbody>
<tr>
<td>STUDENT EXPERIENCE</td>
<td>1. Improve student learning and experiences by examining what—and how—we teach in support of UPEI’s vision of becoming a leader in experiential learning.</td>
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<td></td>
<td>2. Provide better service to students to improve overall student experience</td>
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<td>VIBRANT COMMUNITIES</td>
<td>Make UPEI a centre that fosters the growth and development of our people and the engagement of our communities</td>
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<tr>
<td>EXPLORATION AND DISCOVERY</td>
<td>Develop an increasingly relevant research culture that reaches further into our classrooms and communities</td>
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<tr>
<td>LONG-TERM SUSTAINABILITY</td>
<td>Achieve ongoing growth at UPEI to enable a thriving, sustainable future</td>
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* For operational targets see Section C. Scorecard.
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<tr>
<th>KEY INITIATIVES</th>
<th>ULTIMATE ACCOUNTABILITY</th>
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<tbody>
<tr>
<td>1 a. Establish baseline of experiential learning opportunities currently offered</td>
<td>VP, Academic</td>
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<tr>
<td>1 b. Further develop experiential and active learning curriculum, interdisciplinary opportunities, and program innovation in all programs</td>
<td>VP, Academic</td>
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<td>1 c. Establish a UPEI Teaching Centre</td>
<td>VP, Academic</td>
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<td>2 a. Create more student-academic staff interaction opportunities</td>
<td>VP, Academic</td>
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<tr>
<td>2 b. Adopt co-curricular transcript</td>
<td>VP, Academic</td>
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<tr>
<td>2 c. Develop “one-stop shop” for students</td>
<td>VP, Administration and Finance</td>
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<tr>
<td>2 d. Enhance international student experiences through strong services and integration opportunities</td>
<td>VP, Administration and Finance</td>
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<tr>
<td>2 e. Foster a student service culture through effective policies and operational practices</td>
<td>VP, Academic</td>
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<tr>
<td>1. Focus on employee development</td>
<td>VP, Administration and Finance</td>
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<td>2. Build pride in our University on campus and develop a stronger UPEI presence across Prince Edward Island</td>
<td>VP, Administration and Finance</td>
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<td>3. Communicate Dare to Dream ideas as implemented</td>
<td>VP, Academic and President</td>
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<td>4. Establish a University Community Advisory Group</td>
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<td>1. Create a more efficient and effective technology transfer unit</td>
<td>VP, Research</td>
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<tr>
<td>2. Explore the potential of new research programs, leverage existing expertise, and increase interdisciplinary research</td>
<td>VP, Research</td>
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<tr>
<td>3. Continue growth of UPEI’s graduate program</td>
<td>VP, Research</td>
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<tr>
<td>4. Streamline proposal and protocol processing and increase personalized assistance with proposal preparation</td>
<td>VP, Administration and Finance</td>
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<tr>
<td>5. Build engagement of academic staff/student research</td>
<td>VP, Research</td>
</tr>
<tr>
<td>1. Recruitment and retention viewed by all as UPEI’s top priority</td>
<td>VP, Academic</td>
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<tr>
<td>2. Implement Strategic Enrolment Management</td>
<td>VP, Academic</td>
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<tr>
<td>3. Implement University-led program review cycle</td>
<td>VP, Academic</td>
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<tr>
<td>4. Develop effective operational models for all Faculties and Schools</td>
<td>VP, Administration and Finance</td>
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<tr>
<td>5. Establish Risk Management Committee</td>
<td>VP, Administration and Finance</td>
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<tr>
<td>6. Develop an effective communications strategy that clearly outlines UPEI’s impacts and contributions to building a strong University, province, and nation</td>
<td>VP, Academic &amp; President</td>
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APPENDIX 2: Context of the UPEI Strategic Plan

The UPEI Strategic Plan builds on the UPEI Vision Document as a roadmap for transformation over the next five years.

The UPEI Strategic Plan is based on:

- information gathered over the past 15 months through UPEI’s successful Future Directions initiative and Dare to Dream campaign,
- a review of priorities identified in UPEI’s 2009 Strategic Overview prepared for the UPEI Board of Governors,
- input of UPEI’s senior leadership team and government partners, and
- issues and trends impacting post-secondary education.

The development of the UPEI Strategic Plan represents Phase 3 of the Future Directions initiative. Phase 4 of Future Directions will entail the roll out, communication, implementation, and evaluation of the UPEI Strategic Plan.

Within the plan are five strategic priorities and related initiatives that form pathways to student success, a stronger UPEI experience, an enhanced work environment, and the ability to achieve balanced budgets to enable the sustainability of our institution. Key initiatives are highly reflective of input gathered through the Future Directions initiative and Dare to Dream campaign. In the near term, UPEI’s Vice-Presidents will oversee the development of detailed operational plans to support and implement these initiatives. Upon adoption of the UPEI Strategic Plan by UPEI’s Board of Governors, an accountability framework will be implemented to track the progress of the plan publicly.

The UPEI Strategic Plan builds upon the four pillars outlined in UPEI’s Vision Document. The plan identifies strategic priorities that enable UPEI to build for the future while managing the challenges of today. The initiatives outlined within the plan directly support UPEI’s values.
APPENDIX 3: Future Directions Process

PHASE 1 JANUARY–APRIL 2012
Internal and external community consultations on the strengths, vision, and future needs of UPEI

MAY 2012
UPEI Vision Document endorsed by UPEI Senate and UPEI Board of Governors

PHASE 2 JUNE–OCTOBER 2012
Dare to Dream campaign launched to encourage continued staff, faculty, and student input on ways to build a transformative UPEI of the future

SEPTEMBER 2012
Future Directions update provided to UPEI Board of Governors

OCTOBER–DECEMBER 2012
UPEI Strategy Incubation Team reviews Dare to Dream ideas and provides report to President and Vice-Presidents

PHASE 3 JANUARY–MARCH 2013
Vice-Presidents review input to-date and provide priorities for strategic planning purposes – preliminary UPEI Strategic Plan is drafted

APRIL 2013
Preliminary draft further developed by Vice-Presidents based on year-end information

MAY 2013
Preliminary draft shared for input with UPEI Board of Governors and leadership team

JUNE TO AUGUST 2013
Vice-Presidents, Deans, and Directors identify resources and initiate the development of detailed planning to support key initiatives of the UPEI Strategic Plan and development of accountability framework

LATE AUGUST TO EARLY OCTOBER 2013
Draft UPEI Strategic Plan to be shared with campus community from August 28 to October 4

SEPTEMBER 2013
UPEI Strategic Plan to be discussed at Senate

OCTOBER 2013
UPEI Strategic Plan to be presented to UPEI Board of Governors for consideration

PHASE 4
Upon adoption by UPEI Board of Governors, UPEI Strategic Plan is rolled out, implemented, and evaluated on an ongoing basis between 2013–2018
### APPENDIX 4: Summary of Dare to Dream Ideas Contributing to UPEI Strategic Plan Initiatives

<table>
<thead>
<tr>
<th>PILLARS: VISION DOCUMENT</th>
<th>DARE TO DREAM IDEAS CONTRIBUTING TO INITIATIVES (note: ideas are bundled &amp; presented in general terms)</th>
</tr>
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<tbody>
<tr>
<td><strong>STUDENT EXPERIENCE</strong></td>
<td>Adopt a truly student-focused approach to education; improve the first year experience; rethink the learning environment; develop more/better services, increase community and experience-based learning opportunities; provide more international experiences for students and staff; build global awareness and citizenship; improve internationalization planning; implement student as scholar; create more interdisciplinary programs and flexibility in programs; remove barriers to good programming ideas; make it easier for students to participate in the educational experiences they seek; create new and more relevant undergraduate and graduate programs; provide enhanced employability skills; consider accelerated degrees for international students; consider pre-masters and honours programs; improve mature student supports; provide more CE for professionals; improve IT systems; provide space for art and culture; encourage more faculty development/enriched teaching; bring in co-curricular transcripts/e-portfolios; develop a UPEI Welcome Centre; provide single point of contact service; serve students better; provide better supports for international students on campus and in the community</td>
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<tr>
<td><strong>VIBRANT COMMUNITIES</strong></td>
<td>Establish more respect on campus for the expertise of all—staff and faculty alike; create mentorship opportunities for all; provide enhanced training to staff and faculty; build leadership potential for faculty and staff; enhance faculty development and collegiality; improve HR orientation; further support a healthy workplace; create opportunities for colleagues to get to know each other and each other’s work better; develop better internal and external communications to share successes; build ‘Panther Pride’ for our athletics; encourage morale boosters including contests and challenges; do a better job of bringing UPEI to the community and the community to UPEI; support employee volunteerism; engage alumni better; encourage more cross campus idea incubation; welcome community members as volunteers for special UPEI events</td>
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<tr>
<td><strong>EXPLORATION &amp; DISCOVERY</strong></td>
<td>Enhance knowledge translation; build new graduate programs; leverage current expertise; develop areas such as brain trauma, climate change, health, aquatic health; education research; expand research infrastructure and data sharing on campus; improve international grad student support; support more interdisciplinary collaboration; provide mentorship for grad students; find dedicated meeting space for grad students</td>
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<tr>
<td><strong>LIVING SUSTAINABILITY</strong> (now referred to as Long-term Sustainability)</td>
<td>Improve recruitment, retention, student experience; develop more relevant programs; better understand and meet student expectations; provide enhanced training for staff and faculty; identify revenue opportunities within athletics including training camps, consider distance education and lifelong learning opportunities; improve administrative processes; develop a well defined internationalization strategy; improve support for arts and culture on campus; support grass roots environmental initiatives including carpooling, gardens, living rooftops; more NGO partnerships; improve connectivity with our communities; develop improved UPEI presence across PEI</td>
</tr>
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