Strategic Planning Feedback from Advisory Board
11/5/2015

Plan includes all of the right elements. Suggestion: Ok to brag and be specific about needs. Lots of the introductory pages can go to appendix.

Include a timeline (10 year?) with examples of goals and how to measure. Shorten document.

Include opening/lead sentence that summarizes the first sentence about what we have and where we were going would be useful.

Need metrics. Document’s structure is good. Better to have more info than you need, so it can be edited down. It is a directional document for guiding the institution for the next decade; not necessary to have timeline.

In University environment it’s hard to predict more than 3-5 years. Document is comprehensive enough that in the next 2 years we can commit to a certain topic area. Then create additional implementation plans to help focus next 8-10 years.

Document is a good, shows broad vision and strengths of RTC. RTC should take more credit of what it is already doing. A vibrant hub of activity. Take credit and frame it as next leap, instead of as initial baseline. In Exec. Summary 3rd paragraph, frame in a way that is more compelling, reaching into range of activities as vibrant hub and campus, Bay Area and broadly.

Well articulated goal for three main functions. Keep in mind those positive aspects. Agree that we should point out great resources activities that already exist. Effective strat plan would be similar to a NSF proposal. This doc isn’t quite like that yet. What’s the need, what’s the problem. We have this vision, and if you give us resources here’s what we can achieve. Want to see some strategy.

RTC part of a global network of marine labs. Does RTC have a specialty or is there research “complementariness” with other labs? Maybe not for vision statement, but maybe for implementation stage.

A strat planning doc is a reference point, a document that helps you say no, and keeps you on course with the mission.

Regarding strategies, the clearer the language the better. Assume the reader is naïve. If this point is about hiring more staff, then say, hire more staff. Sub point is what type of staff. Much of the language is too vague. Also, what are strategy priorities?

What’s currently being done, what is new? How long are we talking about? What kind of resources? Impression is that there is a lot there, but I am not sure how you are going to execute. 1-3 year plan needs to be clear, but impression is if we commit we need some
competence in how we’re going to execute. Just how granular do we expect this doc need to be. Then some annual review to work on deliverables.

Look at perspective from student view, want to see student at forefront of document. Increased scientific opportunities for students. Research is not necessarily the top for students. Alignment of goals that we’re going to do this for students.

It would be a shame if students were lost, if this doc didn’t clearly resonate for students. But it’s not an either/or. Courses, experiences offering because of the larger context of societal environmental needs. It’s students AND research, not instead of.

Reword to bring it down to layperson level. Add students to executive summary.

What are students currently working on and where they go when they finish? Telling student stories. Good framework, context. Practical way to implement that do a 10-min video at Discovery Day, when you go in to the labs and see the young professionals describing their work.

What they are working on now, faculty successes, they change and need to be fresh. Working to transform annual report to give it a refresh.

Add In appendix, key performance indicators.

We have all senior researchers, and a marine lab cannot run on soft money, you have to remember this, what ‘s unique is that we can give them hands on research in the field. We can’t do that much more on soft money. Research has to happen to bring students in.

Re: p. 7, venn diagram – “become a recognized center”, this center IS recognized

If we’re trying to integrate the local people, we need to tell potential donors about the things that we can’t do but want to … if you contribute it will fill the hole.

Suggest copy edit before finalized.

Public engagement goal p. 11 - Develop landscape stewardship for the center, important but it seems off target. If it stays in you have to help reader see connection. Focus has been marine/estuarine, then it’s landscape. Seems out of context.

Maybe landscape area is fuzzy, as tactic and not strategy. Great set of tactics, reflect values, maybe it lives in operating plan. In general 1/3rd are tactics not strategies in doc. Want a pithy document to be able to guide decision making.