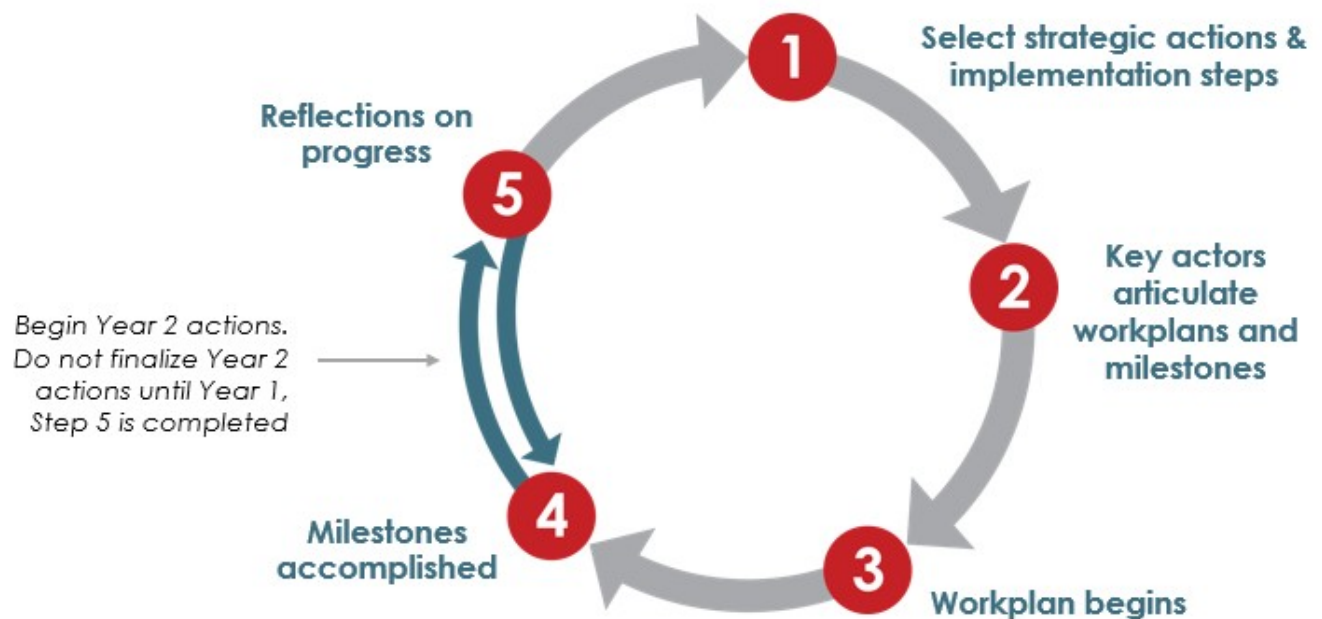# Context

WCER's mission is to improve educational outcomes for diverse student populations, impact education practice positively, and foster collaborations among academic disciplines and practitioners. The values that the people of WCER strive to uphold are innovation and excellence, equitable education, affirming and increasing diversity, a healthy workplace, and partnering across differences. It is in the context of our mission and values that we carried out the 2021 strategic planning process.

The idea to engage in strategic planning dates back to the search for a new WCER director that began in 2019, as that director would be expected to use strategic planning to set the direction for WCER's future. The foundation for the strategic planning process was laid prior to this through a range of staff efforts, including the development of our values statement and our 2019-2020 climate survey.

In July 2020, Dr. Courtney Bell became the new director and began a WCER listening tour of more than 120 individuals, including all service staff members, select academic and university staff, colleagues in the School of Education, and faculty members in WCER. Then, in Fall 2020, the center initiated a formal strategic planning process based on the vision of Dr. Bell and the insights gleaned from the listening tour. The goal was to guide the work of the center toward its mission and specify ways in which the center would uphold its values. Strategic planning will be ongoing and framed by a yearly cycle (see Figure 1). This report includes the recommendations that emerged from the dedicated work of the 2021 strategic planning group members.

Figure 1. Yearly Strategic Planning Cycle

Select strategic actions & implementation steps — 1

Key actors articulate workplans and milestones — 2

Workplan begins — 3

Milestones accomplished — 4

Reflections on progress — 5

Begin Year 2 actions. Do not finalize Year 2 actions until Year 1, Step 5 is completed

It is important to note that the work of the 2021 strategic planning group took place during a pandemic that has had significant consequences for the center. In 2020, the WCER workforce consisted of approximately 525 academic staff, university staff, faculty, graduate students, hourly students, postdoctoral scholars, and research interns. WCER's funding sources from FY18–FY20 are displayed in Figure 2.

Figure 2. WCER Revenue by Source
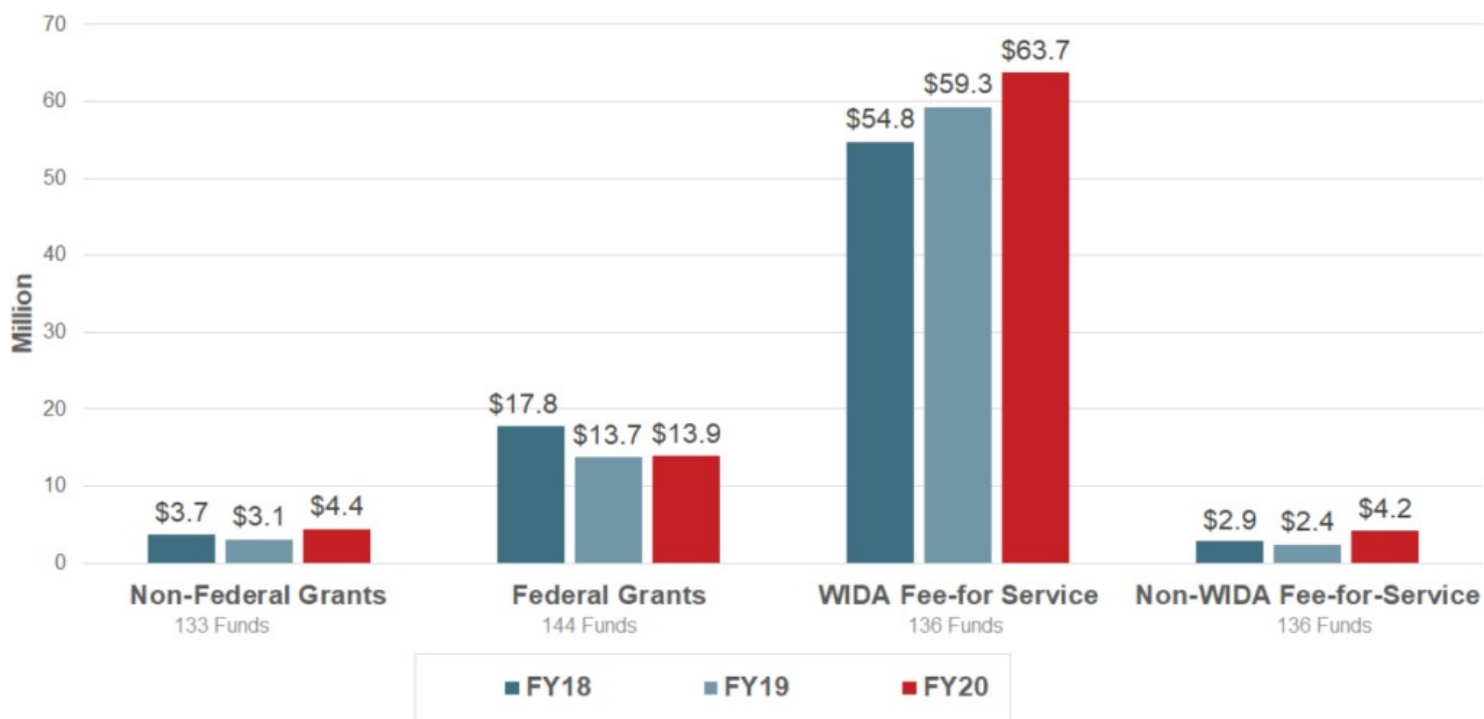
By September 1, 2021, WCER will have lost approximately one-third of its service staff through layoffs, retirements, and attrition. These losses directly impact the service units—director's office, business services, and technical services. More broadly, the financial reality will continue to shape the ongoing implementation of strategic plans over the next 3 years. The strategic planning actions set out in this report seek to minimize any indirect impacts of this decreased capacity on WCER's research projects.

Strategic Planning Leadership Team and Committee

Strategic planning group members were drawn from throughout WCER and the School of Education. The leadership team consisted of Dr. Bell, deputy director and interim business services director Mariana Castro, special assistant for diversity, equity, and inclusion Shahanna McKinney-Baldon, strategic planning project manager Sarah Archibald, and senior editor Kurt Brown. The UW Office of Strategic Consulting helped plan the effort and co-facilitated several of the monthly meetings. The leadership team was joined in these meetings by the strategic planning committee. Combined, these 29 individuals represent the various groups, roles, units, and voices in WCER. The leadership team and committee met once a month from January to May 2021 to document and establish the direction of the organization, set priorities, and focus the center's energy and resources to ensure

that our work advances common goals. The committee also acted as ambassadors to the rest of WCER by sharing what happened at the planning meetings with their colleagues and bringing back their ideas and questions to subsequent meetings.

Charge

The strategic planning committee was charged with adhering to the WCER values. Including the wider WCER community in the process helped to center these values. Further, this was an opportunity to bring together a cross-functional team of WCER stakeholders for conversations centering equity to help prioritize our work over the coming years.

Based in part on Director Bell's listening tour and her vision for WCER, the leadership team identified five focus areas: diversity, equity, and inclusion (DEI), improving services, becoming a learning organization, research, and funding. The team then created a goal statement for each focus area and asked the committee to develop actions that would realize the five goals:

1. identify and foster the knowledge, skills, and awareness of positionality needed to integrate DEI into the center's daily operations;

2. improve and expand the center's services equitably to students, faculty, and academic and university staff;

3. use problem solving, experimentation, learning from diverse experiences, and efficient transfer of knowledge to achieve our mission;

4. promote high-quality, community-connected local, state, national, and international research on education;

5. expand and diversify sources of funding for research.

Summary of Strategic Planning Meetings

Strategic planning meetings addressed where WCER is now, where it should be going, what obstacles might make it challenging to achieve its goals, and what actions it should take to achieve its mission. The committee's activities are described next.

Where Are We Now?

In January 2021, the committee analyzed the current strategic juncture between WCER's history and future. This required analyzing the window of opportunity, barriers, needed changes, how to foster what was working well, and short- and long-

term directions. The critical question addressed in this meeting was: "As we chart our path over the next 3–5 years, what must we be mindful of to achieve our goals?"

We also sought to consider WCER operations from different angles, perspectives, and experiences. Dr. LaVar Charleston, School of Education associate dean for diversity and inclusion, encouraged the committee to seize this opportunity to move from merely aspiring to be more diverse, equitable, and inclusive to charting a path that makes this a reality.

Where Should We Be Going?

The goal of the February and March meetings was to develop a practical vision for the next 3–5 years that motivates and inspires. To meet this goal, the committee was asked to imagine what it would look like if WCER became a learning organization that provides excellent services and research through expanded and diversified funding, and where daily operations were centered on DEI?"

Several ideas emerged, examples of which included WCER as:

> •the go-to place for education policymakers and practitioners;

> •known for generative research, with research questions coming from the community;

> •a vibrant training community;

> •able to make research findings accessible and actionable for academic and other audiences;

> •a community that improves its focus on equity.

What Might Block Us from Achieving Our Vision?

In the April meeting the committee discussed the need to be vigilant in ensuring that no voices were lost in the planning. Committee members wondered if there were ways to create an equity-minded lens for the strategic planning goals, citing an initial lack of clarity on underlying DEI values that will shape our work toward our goals. Does the way the strategic planning process was designed take into consideration larger cultural and historical systemic contradictions, such as colonialism, racism, and ableism? If not, how can we ensure we do not lose sight of these issues?

The committee requested further discussion to better understand WCER's work across units and projects, as well as how to center DEI across the five strategic planning goals. Center-wide discussions on each goal, as well as a conversation on DEI facilitated by Ms. McKinney-Baldon, were planned to address these needs. The

committee agreed to come to the May meeting with ideas for revising the process to better fit the needs of the center, as well as a set of potential actions for each goal.

What Strategic Actions Will Allow Us to Meet Our Goals?

Prior to the final meeting in May, the leadership team used input from the committee to compile a list of initial actions toward achieving the five strategic planning goals (see next section). Participants examined the actions under each of the goals and discussed which actions could support DEI in our center, which could be the most impactful to WCER projects, and which could enhance WCER values. Participants developed potential implementation steps for each action; they also were asked to consider how the five goals would impact their own roles and projects. Ideas generated included:

- pairing senior faculty with junior faculty—particularly faculty of color—to enlarge the former's perspective and enhance the quality of work;

- creating a pipeline of postdocs to help mentor junior faculty and build capacity;

- building collaborative learning communities to increase collaboration within the center and across campus;

- establishing transparent, equitably accessible processes that contribute to DEI goals;

- engaging junior staff and students more fully in the center's mission;

- asking supervisors to put the goals and strategic actions in front of their teams at every opportunity;

- supporting all within the center to be part of the intellectual community working in education research, which aspires to make a difference in the world;

- examining inefficiencies within each WCER member's role and identifying what impedes success;

- supporting fee-for-service units that do not have the infrastructure to meet increased demand—larger fee-for-service shops in WCER have procedures and protocols that the center itself might benefit from, and this added expertise might generate increased fee-for-service income;

- helping researchers develop their grant-writing skills, building a supportive community that shares ideas around research and mentoring, and aggressively recruiting and retaining talent from diverse backgrounds;

•investigating what is involved in providing services and products beyond the research we do, perhaps modeling the Wisconsin center for Education Products and Services and finding out who within WCER is interested in products, services, promotion, and marketing;

•sharing among units and individual PIs the products and services they develop, such as surveys, learning environments, or processes.

Strategic Planning Committee Recommendations for Actions

Input from the committee was incorporated into a final list of actions under each goal.

Goal 1: Identify the knowledge, skills and awareness of positionality needed to integrate DEI into the center's daily operations

Action 1. Determine how WCER will use insights from individual and organizational learning literatures

> •Identify leadership information needs
> •Plan individual and organizational learning opportunities
> •Track progress toward DEI goals

Action 2. Develop an action plan to operationalize DEI at WCER

> •Create and maintain a record of existing initiatives across the center
> •Engage stakeholders with expertise in this area
> •Conduct a Center-wide process for input, prioritization, and selection of strategic actions that build on insights from the strategic planning committee

Action 3. Create an infrastructure to sustain DEI work

> •Recruit and hire a fulltime DEI leader within WCER
> •Participate in and collaborate with School of Education initiatives through the Office of Equity, Diversity, and Inclusion
> •Strengthen existing/establish new networks across campus and School of Education
> •Review and determine strategic next steps for strengthening existing internal structures

Goal 2: Improve and expand the center's services equitably to students, academic and university staff, and faculty

Action 1. Improve the effectiveness of service units

> •Design and implement organizational structures and workflows that maximize staff expertise and capacity
> •Collect and analyze data on best business practices through a DEI lens
> •Conduct capacity analysis to create equitable workloads, improved turnaround times, and inquiry tracking

Action 2. Operationalize a culture of learning and continuous improvement

> •Review the quality and types of services provided
> •Identify data and metrics needed to monitor continuous improvement with a DEI lens
> •Implement yearly reflection on areas of growth and excellence

Action 3. Develop distributed service leadership

> •Differentiate transactional and strategic work
> •Identify how advisory groups can contribute to distributed leadership
> •Design a process for solving barriers to projects' success with attention to DEI

Action 4. Address culture and climate issues

> •Analyze pipelines for professional growth and leadership
> •Examine representation in key positions
> •Translate data from WCER climate study and other sources into strategic actions
> •Use retention practices focused on belonging, satisfaction with current job, and future goals
> •Collect and use data at natural points in the job cycle
> •Elicit information from various stakeholders
> •Enhance client service attitudes and behaviors

Goal 3: Use problem solving, experimentation, learning from diverse experiences, and efficient transfer of knowledge to achieve our mission

Action 1. Design and implement professional opportunities for staff members

> •Build structured learning opportunities
> •Implement internal and external mentoring
> •Normalize failure and learning

Action 2. Develop a plan for learning from similar centers across campus and the nation

> •Design and implement learning plans at the unit and center levels
> •Develop and test metrics of service quality that are sensitive to learning

Goal 4: Promote high-quality, community-connected local, state, national and international research on education

Action 1. Improve and expand the communication about and visibility of research produced at WCER

> •Hire technical writer(s) who can turn research ideas and findings into plain language, briefs, and stories for different stakeholders
> •Understand our communication needs and areas for impact
> •Partner with communication resources across and beyond the university

Action 2. Create learning communities around core research

> •Implement job-alike, cross-project, DEI-sensitive professional learning opportunities
> •Develop knowledge-sharing sessions about funder-specific and general successes and failures in getting grants
> •Develop research and fee-for-service tools, protocols, and processes for use across projects

Action 3. Broaden and deepen research and development support

> •Review current supports for international, interdisciplinary, and qualitative research
> •Implement a strategy that strengthens community-based research and fee-for-service activities
> •Implement a strategy to enhance qualitative and mixed-methods research
> •Create policies and processes that support and encourage international trajectories of research

Goal 5: Expand and diversify sources of funding for research

Action 1. Develop a strategy for winning high-return funding opportunities

> •Invite key stakeholders to help develop the strategy
> •Create an advisory committee of stakeholders

•Invest in robust infrastructure, systems, and training to obtain such grants and fee-for-service projects

Action 2. Pioneer a fee-for-service approach to research development, products, and services

•Establish relationships and partnerships with departments, private sector companies, consultants, and other organizations with complementary and diverse expertise and interests

Action 3. Improve the success rate and diversification of funding

•Support grant-writing skills of PIs with diverse research interests through writing bootcamps
•Create teams and methods to analyze and rework rejected proposals
•Create mentoring and collaboration supports
•Create and mobilize graphic artists and design teams to enhance WCER proposals

Toward Implementation: Three-Year Plan

WCER leadership will share the recommendations of the strategic plan team with various stakeholders, including the service units and the rest of the WCER community. With input from stakeholders, leadership will prioritize the actions and establish a timeline for the coming 3 years while accounting for other campus and School of Education initiatives, the daily work of the center, and the effects of the pandemic on WCER finances. Yearly plans will be made as noted in Figure 1, with action and implementation steps collaboratively carried out by stakeholders. Each year will include a review of and reflection on the previous year's accomplishments and challenges. Subsequent years' plans will be adjusted to maximize progress and the embodiment of WCER values.