

STRATEGIC PLANNING IN HIGHER EDUCATION: A
COMPARATIVE ANALYSIS OF TWO CANADIAN
UNIVERSITIES

THE CASES OF UBC AND UOTTAWA.

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Abstract

This Major Research Paper examines contemporary issues in Canadian higher education through the analysis of strategic plans from the University of British Columbia (UBC) and the University of Ottawa (uOttawa). It explores how these universities develop and prioritize their strategic plans, focusing on their mission, vision, values, and strategic objectives. The paper highlights the importance of aligning resources with strategic priorities to ensure effective implementation and continuous adaptation to changing environments. Key challenges addressed include financial constraints, government scrutiny, and the need for accountability. The impact of the COVID-19 pandemic on strategic planning is also discussed, emphasizing the necessity for flexibility and resilience. By comparing the strategic plans of UBC and uOttawa, the paper provides insights into the similarities and differences in their approaches, reflecting broader trends and issues in Canadian higher education. The study underscores the critical role of strategic planning in helping universities navigate complex challenges and fulfill their educational missions. Through a qualitative, case-based analysis, this research contributes to a deeper understanding of how strategic planning can support the sustainability and advancement of higher education institutions in Canada.

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Introduction

Strategic planning in universities is a relatively recent phenomenon (Goldman, 2015; Falkenberg, 2021). The advent of New Public Management in the public sector in the 1980s (McDaniel, 1996; Bryson, 2018; Falkenberg, 2021) saw the transfer of tools and approaches from the private sector into the public sector to allow the latter to benefit from the advantages that these approaches could provide. It has infiltrated universities and altered governance, increasing the role of the marketplace (Potter, 2017). This influence has been seen throughout the world of higher education, including in Canadian universities.

“Postsecondary education in Canada can be traced back to the early permanent settlements of New France, but universities did not emerge until after Canada became a British colony, and the American Revolution forced many of those loyal to the Crown to move north of the 49th Parallel. The first universities were created in the colonies of Nova Scotia, Upper Canada (Ontario), Lower Canada (Quebec), and New Brunswick” (Jones, 2012, p.2).

While Canadian universities are treated as autonomous institutions, the responsibility for universities is shared between the provinces and the Federal Government. There is no federal government department of education or higher education. Rather, there are provincial ministries where, in many provinces, the Minister is also responsible for elementary and secondary education (Jones, 2012). In Canada, postsecondary education, as a branch of education, is constitutionally under provincial jurisdiction. However, the federal government has long been involved in postsecondary education. The extent and nature of its involvement have varied over time (Skolnikv, 1997; CMEC, n.d.). The role and influence of the federal government on postsecondary education in Canada have been very significant. However, the story of postsecondary education in Canada is mostly a story of developments in each of the provinces and, more recently, in the territories as well (Skolnikv, 1997).

Since Canadian universities receive funding from the provincial and federal governments, they become responsible for delivering results and these must be planned and established using a certain process. This process is strategic planning, and evidence of these activities is present in all Canadian universities. If colleges and universities are going to survive, a strong emphasis on planning is essential. Strategic planning is a process by which an organization clearly states its

mission, vision and values, goals and strategies. It is a way to plot the realization of its strategies and monitor its progress on an ongoing basis. According to Bryson, strategic management is “the integration of strategic planning and implementation across an organization in an ongoing way to enhance the fulfillment of mission, meeting of mandates and sustained creation of public value” (Bryson, 2018, p.24). “A very large fraction of public and nonprofit organizations now claim to engage in strategic planning” (Bryson, 2018, p.19) and strategy content influences organizational performance (Meier, 2007). Business-like practices are evolving in Higher Education Institutions (Zamorski, 2003), and how these practices are perceived and understood by practitioners and the impact these practices have on the institutions themselves is misunderstood. (James, 2020).

According to Universities Canada (2024), Canadian universities have welcomed approximately 1.16 million full-time students and 421 thousand part-time students to campus in the fall of 2023. They also provide employment to close to 410,000 people. Since 2015, jobs requiring a bachelor’s degree have increased by 115%, and jobs requiring higher qualifications have increased by 170% (Universities Canada, 2024). In addition to this significant increase in demand, universities are under an increasing amount of financial pressure due to the reduction in government financing. In Ontario, since 2017, the provincial government has put a freeze on direct provincial funding.

“The number of funded domestic students a college or university could admit was fixed as was the funding per student. Two years later, the finances of Ontario’s colleges and universities were further challenged by the province’s decision to reduce by 10% the tuition rates paid by students at these institutions, after which tuition rates were frozen. This freeze is still in effect, and the province has announced it will continue for the 2023-2024 academic year, which began in September “(Harrison, 2023, p.6)

In this environment of financial instability, increased competition,, and required growth, how can universities differentiate themselves and attain their goals? The university strategic plans allow us to gain a glimpse into their world and see their current priorities.

This major research paper is a case-based, qualitative approach examining the strategic plans of 2 Canadian Universities; the University of British Columbia (UBC) and the University of

Ottawa (UofO). It investigates the components of the strategic plans by answering the following question: How do Canadian universities develop their strategic plans; do they include the typical components seen in strategic plans and what are the areas of focus for the strategic plans? This major research paper will examine these questions in detail.

The paper is organized as follows. Section 1 reviews the relevant literature regarding the topic of strategic planning and strategic management in the public sector, and in the university setting. Section 2 addresses the research design used in this paper. It describes the methodology and analytical framework. Section 3 explores the case analysis of the universities and their strategic plans. And finally, section 4 discusses the contemporary issues and trends, followed by the conclusion.

“With the so-called knowledge economy – the most accessible, most generated, most stored, and most valued element of this age – the role of information in human life has expanded” (Aytar, 2024, p.2).

Strategic planning and Strategic Management

Strategic planning in the public sector started in the 1960s in the US and moved into the non-profit sector during the 1960s and 1970s (Goldman, 2015). Due to the growth of the American economy, particularly after the Second World War, strategizing has become a principal action (Aytar, 2021).

“From the mid-1970s through the mid-1980s, higher education experienced a combination of challenging demographic, economic, and technological changes. Higher education costs consistently outpaced inflation. Public support weakened and ideas about planning changed” (Dooris, 2005:27; Bekele, 2021).

In the 1980s, universities and colleges took a closer look at strategic planning. The idea of strategic planning was a rational tool for systemic management. As Bryson would describe, strategic planning is

“a deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it” (Bryson et al., 2018, p.318) (Dooris, 2002. P.27; Biondi 2022; Bryson, 2012).

Australia saw the period known as the Dawkins era in the late 1980s when Minister Dawkins proposed a new framework where universities were structurally transformed through extensive mechanisms and quantity performance measures (Howes, 2018). Throughout the 80s and '90s, strategic planning was becoming more widely adopted, critical analyses of higher education were mounting, and strategic planning was feeling restrictive and bureaucratic (Dooris, 2002). In part, these challenges can be attributed to the relationship between government and higher education institutions, and to changes in government higher education policy (Jones, 2001). In Canada, “The challenge of describing and analyzing Canadian higher education is made even more difficult by the fact that there is no such thing as a Canadian "system" of higher education instead, one can argue that each Canadian province and territory has created a unique network of postsecondary structures and policies.” (Jones, 2012, p.1)

During the past three decades, strategic planning in Canadian governments has gained importance in response to increasing public demands for accountability and transparency. For example, since the late 1990s, the federal government has required government departments and agencies to produce annual reports on plans and priorities (Elbana, 2016). Governments have been requiring more formal planning and accountability (Falkenberg, 2021). At the provincial level, although implementation can vary significantly, all ten Canadian provinces also have priority-setting/strategic planning, budgeting, and performance reporting functions as key elements of their performance management and accountability frameworks (Andrews, 2016).

Despite their longevity and stability, universities are under pressure to evolve, modernize, and change their practices and offerings. They are required to respond to societal needs, competition, and new technology. Universities must change, not in a quiet, gentle manner, but in a significant and tumultuous way. They are being pounded by multiple disruptive trends and increased competition for funding and students. They are expected to be more agile to the external environment (Cowburn, 2005; Bekely, 2021; Falkenberg, 2021; Hall, 2021; Goldman,2015). Strategic planning, adopted from the corporate industry, is prevalent in higher education institutions worldwide (Murij, 2019). To varying degrees, these institutional strategic

plans focus on internationalization strategies that set direction, allocate resources, establish goals, and implement control mechanisms (James, 2020). Knight (2004) suggests that internationalization is a change process for higher education institutions that involves adopting global practices and processes.

To many institutions, strategic planning was relatively new, and it contributed to contradictions between the old way of doing things and the new directions, resource allocation, and coordination fostered by senior management. Strategic planning began to see its integration into higher education management, and universities are encouraged to follow the same role as public organizations in the principles of sound ‘management’ and to adopt practices inspired by results-based management (Dooris, 2002; James, 2020; Larouche, 2016). Despite academic disagreement about its advantages or challenges, strategic planning has become mainstream in higher education, and in general, it is recognized as basic good practice. More recent conceptions of strategic planning now focus more on dynamism, the future, flexibility, organizational intelligence, creativity, and moving from strategy to transformation. More recently, universities in Europe also engaged in strategic planning, because of New Public Management systems (Sutphen,2019.) Public sector organizations have also begun to make more consistent use of strategic management concepts and techniques, and it is now common in the public sector in many countries and at different levels of government in the last decade (Biondi, 2022; Höglund et al, 2021).

What is Strategic Planning?

Strategic plans serve many people and purposes, including to promote and market the university. It signals general directions for a defined period and inspires staff, students, and other stakeholders outside and inside the university. (Sutphen, 2019). Generally, these strategic plans are formulated on a five-year cycle (Goldman, 2015) and strategic planning is not a single thing but rather an approach (or a set of approaches). It “consists of a set of leadership roles, concepts, procedures and tools that must be catered carefully to situations if desirable outcomes are to be achieved” (Bryson, 2012, p. 51). It gives a sense of purpose and provides the direction of where to go (Ongaro, 2020).

According to Bryson (2012), the strategic planning process encompasses the following: It

- “is concerned with identifying and responding to the most fundamental issues facing an organization
- addresses the subjective question of purpose and the often-competing values that influence mission and strategies.
- emphasizes the importance of external trends and forces as they are likely to affect the organization and its mission. (is there a SWOT analysis)
- attempts to be politically realistic by considering the concerns and preferences of internal and especially external stakeholders (did they consult internal and external partners)
- relies heavily on the active involvement of senior level managers and sometimes elected officials assisted by staff support where needed
- requires the candid confrontation of critical issues by key participants in order to build commitment to plan
- is action oriented and stresses the importance of developing plans for implementing strategies.
- focuses on implementing decisions now in order to position the organization favorably for the future.” (Bryson, 2012. P.51)

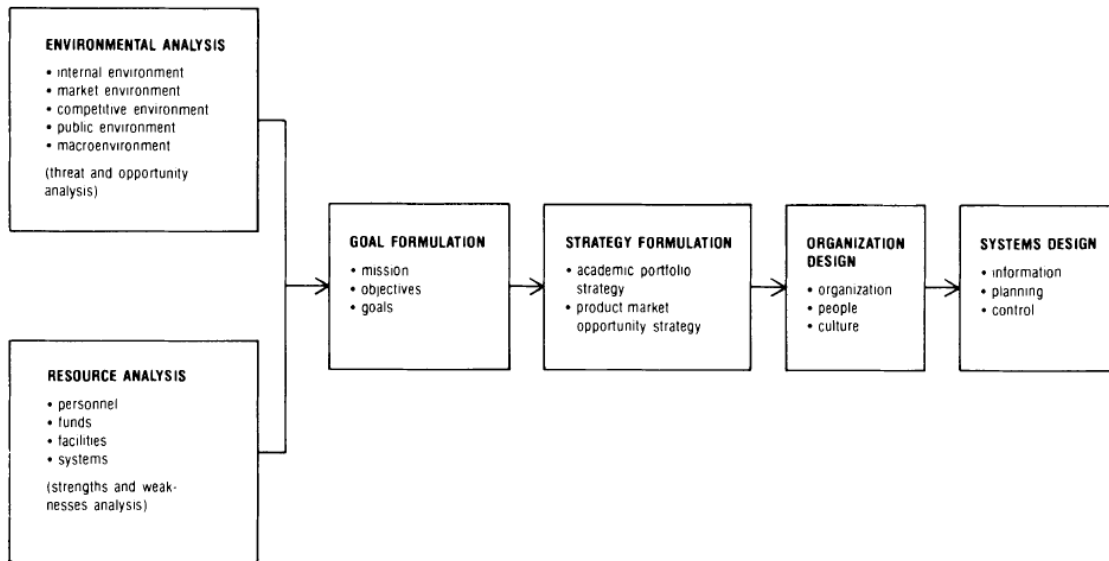
A strategic plan outlines the mission and vision of an organization, the context in which it operates, and the key challenges it faces. It details the strategic directions, intervention strategies, and objectives chosen, along with the targets to be achieved by the end of the plan period and the performance indicators used to measure success. In the context of universities, strategic plans have become crucial tools in modern governance. They articulate the university's formal ambitions, define its societal roles, specify the tasks to be undertaken within a set timeframe, and serve as a marketing tool for attracting students, staff, politicians, and the public (Sutphen, 2019). Strategic management's role focuses on the actions to position the organization so it can move into the future (Biondi, 2022). Universities are thus expected to significantly and directly contribute to innovation, economic growth and development, democratization, social cohesion, and sustainability. Universities worldwide use strategic planning to “direct long-term institutional priorities, establish internal benchmarking indicators, and restructure broad ways of operating in response to changing external drivers, relations, and societal expectations” (Bekele, 2021). Top-down guidance is essential for providing a clear

vision, mission, and set of goals, particularly in the decentralized environment of many universities (Sminia, 2006; Kwiek, 2018). This approach ensures a unified direction and cohesive strategy across various departments and faculties. However, bottom-up planning is equally important as it allows for the inclusion of insights and feedback from all levels of the organization. This participatory approach helps to ensure that the strategic plan is realistic, achievable and has the buy-in from those implementing it. By combining top-down and bottom-up planning, universities can create a more comprehensive and effective strategic plan that aligns with their overall mission while also addressing individual units' specific needs and challenges (Goldman, 2015; Elbanna, 2016).

How strategic plans are created

In order to identify the challenges it faces and how it will address them, an organization will want to undertake a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis (Bekele, 2021; Aljuwaiber, 2024; George, 2017). Many organizations use SWOT analysis, to determine future strategies based on the evaluation of environmental influences, opportunities, threats, strengths, and weaknesses. For setting future objectives, it is important to know the organization's real potential. According to Kotler, this environmental analysis is an essential part of the strategic planning process since the environment changes constantly, it requires careful analysis to see if the organizational strategies should change as well. Kotler outlines the critical components of the strategic planning process model.

Figure 1 Strategic planning process model



(Kotler, 2024, p.472)

Larouche further supports Kotler’s ideas of what is included in a strategic plan.

Figure 2. What is an organizational strategic plan



(Larouche, 2016)

Finally, it is crucial to understand what strategic planning is not. According to Bryson (2012), strategic planning should not be seen as a replacement for strategic thinking, acting, and learning. While strategic planning provides a structured framework for setting goals and outlining steps to achieve them, it is not a one-time activity that can be completed and then forgotten. Instead, it must be viewed as an active, ongoing process that requires continuous

implementation, monitoring, and updating. This dynamic approach is necessary because the environment in which organizations operate is constantly evolving, and unforeseen disruptions can occur at any time. Therefore, strategic planning must be flexible and adaptable, allowing organizations to respond effectively to new challenges and opportunities as they arise. By integrating strategic thinking, acting, and learning into the planning process, organizations can ensure that their strategies remain relevant and effective in achieving their long-term objectives.

Advantages

Strategic Plans tend to break down higher goals into particular departmental and unit objectives, which guides inexperienced managers and enables the university leadership to monitor accomplishments straightforwardly. As universities gain experience in formal, strategic planning, it allows the leadership team to set expectations and manage performance more effectively allowing everyone to focus on the initiatives that will enable them to achieve an institutions' broad goals (Goldman, 2015). The basic assumption underpinning the practice of strategic planning is that investing resources in formulating good plans is rational because this will vastly improve the prospects of implementation success (Elbana, 2016). The extensive research and popular literature on business strategies reflect the importance of strategic planning in a market-based economy. Although universities and businesses have different mandates and operating contexts, this is still relevant to higher education. (Falkenberg. 2021). According to Bryson (2012), strategic planning offers five key benefits. Firstly, it promotes learning throughout the process. Secondly, it enhances decision-making capabilities. Thirdly, it improves organizational effectiveness, responsiveness, and resilience. Fourthly, it boosts organizational legitimacy. Lastly, it benefits the individuals involved by helping them perform their roles more effectively.

Challenges

Complex and comprehensive, strategic planning has many challenges it must overcome to be effective and efficient. When goals are too broad and require coordination across multiple units, it becomes more difficult to manage than if the actions were separate and distinct (Goldman, 2015). Additionally, the more profound the change, the greater its resistance, making implementation even more challenging (Chandler. 2013). Many organizations excel at developing strategic plans but often face challenges in implementing them. Problems with implementation have as much to do with the formulation of the plan as with whether they are

properly executed (Cowburn 2005). Poorly executed plans can discourage commitment, impede serious change, and encourage politics (Howes. 2018). “The problem is not that institutions cannot identify their goals but rather that they simultaneously embrace many conflicting goals” (Larouche, 2016, p.2).

The process can break down when strategic planning is not linked to implementation (Leskaj, 2017). It can only be successful and produce benefits if it is driven through budgeting, measurement, and performance management processes (Leskaj, 2017). The conventional higher education models of ‘top-down’ or ‘bottom-up’ management are proving less workable in today’s sector. Clearly, the ‘bottom-up’ collegial approach has the advantages of inclusion, transparency, and ownership, but these are somewhat outweighed by the potential for mixed messages and disappointment and the inability to make quick decisions and take up new opportunities. However, as Cowburn points out, the alternative may not always be more effective: “Top-down decision-making by university chief executives, however well-intentioned, has a bad track record in good universities” (Cowburn, 2005, p.106). To succeed, it is important to create a shared vision that will guide the planning process to ensure it is aligned with the organization's core values. If all the stakeholders do not share the core organizational values, and in the case of universities, academic staff and the university executive are not thinking or planning as one, it will be very difficult, if not impossible, to develop a shared vision and conduct an effective, productive and efficient strategic planning process (Howes. 2018)

If universities were less dependent on government funding, they might be better positioned to adopt plans that are both deliverable and feasible (Cowburn, 2005; Goldman, 2015). Often, universities invest significant time and energy into planning, only to do little until the next planning cycle begins (Falkenberg, 2021). To overcome this, it is crucial for universities to align their resources with the priorities outlined in their strategic plans (Goldman, 2015). By doing so, they can ensure that their strategic initiatives are well-conceived and effectively implemented, leading to tangible improvements and progress. This alignment of resources with strategic priorities helps maintain momentum and focus, preventing stagnation between planning cycles. Middle management and staff must be engaged throughout the planning process, so they develop the capacity and understanding required to implement the plan. At the same time, wide input from multiple constituencies must be shaped into a coherent plan aligned with the institution’s major goals (Goldman, 2015)

Financial implications

We would be remiss to neglect the topic of funding, as it is a fundamental aspect at the core of university operations. Under provincial legislation, almost all Canadian universities are established as independent, not-for-profit corporations (Jones, 2001). However, there is increasing scrutiny from government and funding bodies, requiring these institutions to demonstrate accountability and prove their ability to continue providing necessary services (Cowburn, 2005). In addition, the state often seeks to shape strategic university systems toward national policy, and funding is a way to do that (Ferlie, 2009). Over the past few decades, like many other institutions and the government, we have gradually underfunded our higher education system to the point where it is now on the verge of insolvency (Breznitz, 2024). This financial strain underscores the urgent need for universities to secure sustainable funding sources and to manage their resources efficiently to ensure their long-term viability and ability to fulfill their educational missions.

Many things have changed in higher education in the past 60 years. Cowburn (2005) indicates that there was an expectation that funding would continue to increase with the number of students, where the external environment was predictable and where decisions were made in a slow process of consultation and consensus. The universities are more entrepreneurial in nature. The decline in funding puts increasing pressure on them to diversify and reach internationally for students and aim to be more agile and adaptable to respond to new opportunities. Universities compete for funding, students, and other resources and need to undergo strategic change to improve (James, 2020; Dobbins, 2011; Lynch, 2015).

Focused on the federal government and research funding, the U15 provides an annual report to the House of Commons Standing Committee on Finance, recommending research investment funding to the government. The U15 Canada's pre-budget submission 2025 report entitled "Building Resilience: Enabling Research and Fostering Talent in a Turbulent Time (U15 Canada, n.d.) recommends encouraging more support for the U15 to optimize the increased research investments.

What is in a university strategic plan?

Governance

Champagne and Granja (2021) explored the repercussions of the COVID pandemic on university governance and noted that organizations use governance to set, manage, and achieve their objectives. In his research, he indicates that

“nous considérons que la gouvernance universitaire est un amalgame de la gestion stratégique et opérationnelle. Ceci est conforme à l'argument de Michael Shattock, qui affirme que la bonne gouvernance universitaire est une combinaison de procédures structurelles et de stratégie » (Champagne and Granja, 2021. P.2).

Governance relates to decision-making processes and structures, many of which draw on long-standing historical regulatory models (Dobbins, 2021). Governance and organizational structure exert an important influence on the strategic planning process, and one of the unique aspects of Canadian higher education has been the development of a common model of university governance (Jones, 2012). Almost all universities have a bicameral governance structure, including a board of governors responsible for administrative and financial functions and a senate responsible for academic matters (Jones, 2012). Their composition and authority are identified in their institutional charter and the involvement of ‘lay’ participants is an essential element of institutional governance – it becomes a partnership between lay and academic voices (Shattock, 2014). The Massey Commission, which reported to the Government of Canada in 1951, made recommendations that resulted in a major alteration of the federal government's role in education (Skolnikv, 1997). Although there are considerable differences in provincial structures of postsecondary education, one safe generalization is that all provinces have a binary system.

There are differing opinions regarding whether a university should be led by an administrator or an academic. An argument can be made for both scenarios. However, Howes (2018) indicates that new academic-management roles held little appeal for many ‘traditional’ academics who held the view that universities should be led by professors rather than executive academic managers and that university-wide strategic goals and priorities should be academic rather than commercial. In an age where growing financial pressure on institutions requires a

drive towards revenue growth, there is a need for commercial initiatives in university strategies. University governance is a combination of operational and strategic management, and they have long histories with unchanging traditions, so a strong culture is likely to prevail (Chandler, 2013). Any attempt to identify international trends in university governance has to begin with the recognition that the last decade has witnessed major transformations in many countries in the relationship between universities and the state and that the implications of these transformations have not only impacted heavily on university internal governance structures but are ongoing in the sense that institutions are still very much in the process of adapting to the demands of new legislation (Shattock, 2014).

Universities differ from businesses in important ways. Unlike many traditional for-profit enterprises, universities tend to have loosely linked, autonomous departments that emphasize independence and flexibility and more intangible, long-term goals that are difficult to measure (Goldman, 2015). Goldman defines strategic planning in higher education as “the set of activities designed to identify the appropriate future direction of a college and includes specifying the steps to move in that direction” (Goldman, 2015, p.3) Strategic planning in higher education differs from other types of planning. It looks at the long-term future but is more comprehensive and strategic than traditional long-range planning. (Kotler, 2024)

Universities may adopt strategic planning to improve their public image, especially in response to increased public scrutiny following certain events (Goldman, 2015). It is essential for organizational units within the university to take responsibility for their strategic planning while ensuring alignment with the overall strategic plan of the institution (Goldman, 2015; Kotler, 2024). A well-crafted strategic plan can also guide fundraising campaigns. While the public sector faces more problems and constraints than the private sector, public organizations can still benefit from a strategic approach (Leskaj, 2017). However, universities differ significantly from businesses; the expectations of students and academic staff greatly influence how public universities set and prioritize their goals. How academic staff and leaders interpret and embody an institution’s aspirations depends on their professional values (Sutphen, 2019).

In most cases, strategic plans for United Kingdom higher education institutions are sensibly centered on the institutional mission. However, it is slightly disconcerting, though unsurprising, to note that when examining a random selection of mission statements, most institutions appear to strive for similar objectives—aiming to be ‘world-class’, excelling in teaching and research,

while also offering flexible education for students of all ages and backgrounds, and serving the local region. It is difficult to envisage a single institution being simultaneously an effective world player and totally immersed in its local community (Cowburn, 2005). By their nature, public sector organizations are more prone to political processes than other organizations, necessitating tools such as stakeholder analysis to understand actors, interests, and power relations and to find ways other than business to motivate employees (Biondi, 2022). For an institution's mission to be effectively carried out, all stakeholders need opportunities to engage early in strategy formulation and subsequent discussions (Cowburn, 2005). In today's higher education environment, there is a case for rebalancing 'top-down' and 'bottom-up' approaches to rectify the mismatch between formulating and implementing strategic plans within universities. Heads of individual departments and units will inevitably be called upon to draft strategic plans for their sections, and it is crucial to ensure this is not done in isolation. Extensive communication within and between various sections is necessary to ensure coherence and avoid mismatches between plans (Cowburn, 2005).

Research Design

Methodology

This research paper is a comparative case-based analysis that uses a qualitative approach for the comparison of two universities. It also involves a literature review of strategic planning and strategic plans. Qualitative research combines several components with a preponderance given to fieldwork (Morrisette and Demazière, 2019). It contributes richness to our knowledge and understanding (McDonald III et al., 2022). As noted by Tummers and Karsten (2012:65), a literature review serves many purposes, and it helps researchers “formulate a framework for analyzing their topics and problems.”

Our main research question is how Canadian universities, particularly UOttawa and UBC, develop and structure their strategic plans. What are the notable similarities and differences in their approaches? Do they encompass the essential components suggested by Hinton (2012)?

In this section, we examine the university selection process and the similarities and differences of the university's strategic plans. The selected universities belong to the U15, Canada's leading

Research Universities. These 15 research-intensive universities joined hands as an association beginning in 2012, and their purpose was to help advance research and innovation policies and programs that would benefit all Canadians. Below are some similarities and differences between the two institutions.

Figure 3: similarities and differences

University of Ottawa	University of British Columbia
Similarities	
Established in 1848	Established in 1908
Full-time undergrad enrollment: 34800	Full-time undergrad enrollment: 42040
Position in U15 for total undergrad enrollment: 5th	Position in U15 for total undergrad enrollment: 2nd
Full-time graduate enrollment: 7200	Full-time graduate enrollment: 10910
Position in U15 for total graduate enrollment: 6th	Position in U15 for total graduate enrollment: 3rd
The strategic plan is available online	The strategic plan is available online
Differences	
Shanghai World Ranking: 201-300	Shanghai World Ranking: 47
Eastern Canada	Western Canada
Bilingual French: English	Unilingual English

[ShanghaiRanking, Home - U15 Group of Canadian Research Universities, The University of British Columbia, Home | University of Ottawa](#)

Similarities:

Both the University of British Columbia (UBC) and the University of Ottawa (uOttawa) are renowned for their research excellence, with UBC having over 1,300 research contracts and agreements and uOttawa being recognized for its innovative research contributions. They both boast a diverse student body, attracting international students from over 160 countries at UBC and fostering a multicultural environment at uOttawa. Despite their competitive acceptance rates, with UBC's first-choice program acceptance rate around 49% and uOttawa's at approximately 78%, both universities are people-centric and have implemented extensive participatory mechanisms in creating their plans.

Differences:

The University of British Columbia (UBC) is in Vancouver and Kelowna, boasting a larger student population of over 72,000, while the University of Ottawa (uOttawa) is situated in the capital city of Canada, Ottawa, with a smaller student body. uOttawa offers a unique linguistic advantage as a bilingual institution, providing programs in both English and French, whereas UBC primarily offers programs in English. In terms of global rankings, UBC generally ranks higher, often within the top 50 globally, compared to uOttawa, which is ranked around 200. Additionally, UBC offers a wide range of specialized programs, including unique interdisciplinary studies, while uOttawa is renowned for its strong programs in law, social sciences, and public administration.

Analytical Framework

The framework for analysis verifies empirically if the strategic plans of these universities encompass what is regarded as the key components of a strategic plan. It examines the strategic plans' process, form, and structure, using an analytical grid inspired by Hinton (2012) on university strategic planning. It looks at how the plans are structured and how they differ. Was there a participatory mechanism used in their elaboration and what strategies do universities in strategic plans prioritize?

Figure 4 Components of a Strategic Plan



(Hinton, 2012)

While exploring the similarities and differences in the plans' elements, we observe whether the key components of strategic planning are reflected in their elaboration.

Mission statement:

The mission statement is the core of any strategic plan, and managers in the public sector can obtain several benefits from formulating written strategy documents (Höglund, 2018). It clearly explains why the institution exists and what it aims to accomplish. For public institutions, this purpose might be set by the state, but for all institutions, the mission statement clarifies their reason for being. Modern planning practices keep the mission statement simple and direct, highlighting only the institution's primary purpose. Additional goals can be added separately or alongside the mission statement if needed. This approach ensures that the mission statement is clear and straightforward, emphasizing the institution's primary function. (Hinton, 2012)

Values:

Values are typically separated from the mission statement. They outline what the institution stands for and how it plans to operate. Sometimes, these values are so crucial that the institution has specific programs and assessments to uphold them. The Values Statement says, "These are the characteristics we believe are important in how we do our work." (Hinton, 2012. p.10).

Institutional Goals:

Most organizations use a window of 5 or 10 years for their plans, which often correlates to their accreditation schedules. Due to the length of this timeframe, institutional goals tend to be more general and may stay mostly the same over time. This allows them to be carried over from one planning cycle to the next with little to no modifications. (Hinton, 2012)

Vision:

The vision statement is a key part of a strategic plan, outlining what the institution aims to become. It defines the institution's future goals and how they relate to its mission. While the vision might initially come from a leader like the president or provost, it is usually reviewed and refined by the campus community, especially the strategic planning committee. The vision statement helps ensure everyone in the institution shares the same future goals, aligning mission, vision, goals, and resources. Stakeholders need to have a chance to contribute to or revise the vision to ensure collective ownership and direction. (Hinton, 2012).

Goals and Objectives:

There's often confusion between the terms "goal" and "objective" in strategic planning. People sometimes use them interchangeably but have different meanings (Hinton, 2012). A goal is a

specific target that can be achieved and marked as complete. An objective is broader, providing direction without detailing how to achieve it. It's important for everyone involved in planning to agree on the definitions they use. Using clear terms helps organize the plan and measure its success. Goals are for specific achievements, while objectives guide the overall direction.

Implementation Plan

The Implementation Plan turns goals and objectives into actionable steps. This part of the strategic plan is often kept private and kept from the governing board because it is for internal purposes and is frequently updated to adapt to changing circumstances. While the strategic plan provides overall guidance, the Implementation Plan focuses on the detailed work needed to achieve the goals.

A crucial part of the Implementation Plan is identifying the resources required, such as people, time, space, technology, and funding. Even if the exact amounts aren't known initially, it's important to identify the types of resources needed and refine these estimates over time.

The Implementation Plan must be clear and well-documented, specifying who is responsible for each action, the deadline for completion, and how success will be measured. It's important that the person responsible has the authority to act and that only one person is held accountable to avoid confusion. (Hinton, 2012).

Universities will incorporate Key Performance Indicators (KPIs) as specific desired outcomes within their strategic plans. They will detail the methods and processes they will use to continuously monitor and track these KPIs, ensuring continuous assessment and improvement. An annual budget review is mandatory to secure approval for the new budget. This review process involves evaluating financial allocations and ensuring they align with strategic priorities. Additionally, both universities have published comprehensive reports that outline the milestones they have achieved and the outcomes they have reached to date, providing transparency and accountability in their strategic planning and implementation efforts. In response to the pandemic, universities likely revised their strategic priorities, reallocated resources, and developed new initiatives to address the immediate needs of their communities. This experience underscores the need for a dynamic and adaptable strategic planning process to respond to anticipated and unexpected challenges. By continuously monitoring and updating

their plans, universities can better navigate future disruptions and continue to fulfill their educational missions.

The process of plan elaboration is crucial, with James (2020) emphasizing the importance of involving key actors and maintaining a permanent planning committee. Effective strategic planning requires ongoing engagement, meaningful participation, and clear communication of the planning committee's role. University leaders must engage in strategic planning that involves all levels of the institution, harnessing employee motivation and preparing for disruptions. Comprehensive engagement plans are essential to ensure broad participation and address apprehension or suspicion about the process. The mission statement, values, institutional goals, vision, and implementation plan are key components of strategic plans. These elements must be clear, well-documented, and involve stakeholder input to ensure alignment and successful implementation. Universities also incorporate Key Performance Indicators (KPIs) to monitor progress and ensure continuous improvement. The annual budget review aligns financial allocations with strategic priorities, and published reports provide transparency and accountability. The pandemic has highlighted the need for dynamic and adaptable strategic planning to address anticipated and unexpected challenges, ensuring universities can continue fulfilling their educational missions.

Finally, looking at the process utilized to elaborate the plans is essential. James (2020) discussed the importance of involving actors who can contribute to the planning process and that institutions should have a permanent planning committee, if possible. Institutions often form temporary committees with representatives from key groups to create a plan and disband them. However, there are three crucial reasons to maintain a permanent planning committee. (Hinton, 2012; Hill, 2009). The planning committee members must learn about the work involved. Secondly, there must be some monitoring process during the implementation stage to keep the plan on track. Finally, all stakeholders must understand how the planning committee works to contribute. To be effective, university leaders must engage in strategic planning that cascades from the president's office to the individual faculty and staff (Hall, 2121). One of the keys to effective management lies in harnessing the motivation of employees to achieve the organization's goals and objectives (Goldman, 2015). In addition, involving the administration in strategic management allows them to be better prepared for disruptions (Peraya, 2022).

Ongoing engagement promotes the plan's quality and lays the foundation for strong implementation. Planning teams should ensure that participation is meaningful and substantive and avoid symbolic representation or drawing representation only from certain portions of the university (Goldman, 2015). Universities should strive for much higher involvement of staff and students in the university's decision-making processes and develop better mechanisms of strategic planning to anticipate change (instead of short-term and reactive planning) (de Boer, 2022; Aljuwaiber, 2024). Faculty participation is a core component of university operations. Actual change will require support from the faculty and commitment to implementing the strategic plan (Goldman, 2015). A well-formulated engagement plan establishes expectations for which university members will participate meaningfully in the planning and implementation phases and how and when they will participate. This engagement plan can help alleviate the often-noted apprehension among university faculty and staff when a strategic planning effort is launched (Goldman, 2015). External consultants are sometimes viewed with suspicion by internal stakeholders. It further signals the importance of an engagement plan to manage inputs from multiple constituencies and address suspicion about the process and external consultants. Engagement plans should be developed with university leadership before the start of the effort so that they may play a guiding role throughout the process. Planning leadership also should incorporate staff engagement in each step of the planning process, including feedback on revised versions of the plan. (Goldman, 2015; James, 2020).

Case Analysis

Literature on strategic planning in the public sector and university setting identified key components to create a solid strategic plan. Figure 4 outlines these components.

UBC's strategic plan

The 2018 UBC Strategic Plan, titled "Shaping UBC's Next Century," outlines the University of British Columbia's vision, purpose, values, and strategic goals from 2018 to 2028. The plan is structured around three main themes: Inclusion, Collaboration, and Innovation, which are integrated into four core areas: People and Places, Research Excellence, Transformative Learning, and Local and Global Engagement. UBC's vision is to inspire people, ideas, and

actions for a better world. The purpose is to pursue research, learning, and engagement excellence to foster global citizenship and advance a sustainable and just society.

The plan emphasizes five core values: Excellence, Integrity, Respect, Academic Freedom, and Accountability. These fall under three main themes: Inclusion, Collaboration, and Innovation. The plan outlines 20 strategies across four core areas: People and Places, Research Excellence, Transformative Learning, and Local and Global Engagement. The plan provides a framework for decision-making, resource allocation, and progress evaluation. It emphasizes the importance of responsible leadership, community input, and ongoing assessment to ensure the plan's successful implementation.

The 2018 UBC Strategic Plan is a comprehensive roadmap to guide the university's growth and development over the next decade, emphasizing inclusion, collaboration, and innovation.

UOttawa's strategic plan

The "Transformation 2030: Building the University of Tomorrow" strategic plan for the University of Ottawa (uOttawa) outlines the university's vision, goals, and strategies for the next decade. The plan is structured around four strategic pillars: More Agile, More Connected, More Impactful, and More Sustainable. The plan begins with a message from the President, emphasizing the need for uOttawa to adapt and thrive in the 21st-century knowledge economy. The university aims to become an internationally engaged institution, leveraging its growth and strengths. The core aspirations identified during the planning process include transformative learning, cutting-edge research, vibrant Franco-Ontarian and Franco-Canadian culture, effective governance, outstanding leadership and management, and a sustained commitment to the community. The plan is laid out with 20 strategies under four strategic pillars. The first is More Agile, which focuses on ensuring uOttawa remains responsive and adaptable in a rapidly changing world. The second is More Connected, emphasizing the importance of deepening and expanding uOttawa's local and global connections. The third is More Impactful, which focuses on increasing uOttawa's impact on society through research, education, and community engagement. Finally, the fourth is More Sustainable, which addresses the need for sustainability in all university operations. The plan concludes with a commitment to resilience and adaptability, emphasizing the importance of community and collaboration in achieving the university's goals. By 2030, uOttawa aims to be a more united and impactful institution, ready to meet the demands of a rapidly changing world.

Overall, the "Transformation 2030" strategic plan outlines a comprehensive roadmap for uOttawa to enhance its agility, connectivity, impact, and sustainability, ensuring its continued relevance and excellence in the years to come.

Foundation

Strategic planning is a process; however, multiple components comprise the strategic plan, and each element has its function. The process is generally linear and ensures that the components align well and mutually support one another (Hinton, 2012). Figure 4 indicates these various components. In exploring the similarities and differences in the elements of the plans, we observe if the key components of strategic planning are reflected in their elaboration.

Figure 4 Components of a Strategic Plan



(Hinton, 2012)

One noticeable aspect of the strategic plans is that they utilize different expressions or words. In UBC's plan, its mission is called its "purpose." It is defined as follows: "Pursuing excellence in research, learning, and engagement to foster global citizenship and advance a sustainable and just society across British Columbia, Canada, and the world" (UBC, 2018. P.11). In comparison, the uOttawa plan does not state a mission in their strategic plan. They discuss vision, values, and core aspirations and use different terminology to present the same information. For uOttawa, the strategic plan is minimalist in its approach, and one must refer to the website to find further information that is critical to its plan. Several departmental or faculty plans outline values; however, this component is absent from the overall university plan.

Supporting component

UBC's vision states, "Inspiring people, ideas, and actions for a better world." UBC's vision entitled "aspirations" includes multiple messages: "We are building the University of Tomorrow. A unique, forward-looking identity for Francophonie. Our Indigenous Community on campus. Fostering intercultural dialogue for internationalization. We are working toward a more inclusive university community that recognizes that excellence in inclusion is essential to advance research and education. And help make the world better with a sustainability vision". The strategic plans become more robust once we begin discussing goals and objectives. UBC has ten goals, whereas uOttawa has 6 Core aspirations. (See Tables 1 and 2)

As mentioned, universities represent a collection of faculties and services that produce their strategic plans and align these with the university's strategic plan. Once these are completed, the various sectors will create project and action plans to operationalize the strategies and chart their implementation. UBC speaks of the implementation plan as one that will be thorough and rigorous and led by responsible leadership. However, neither of the universities provides details of the implementation plan.

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Planning, adjusting, and correcting is a continuous cycle for universities, ensuring they remain responsive and adaptive to changing circumstances. Both universities maintain progress reports on their websites, providing transparency about their status and the steps they take to achieve their strategic goals. These reports are crucial for stakeholders to understand the progress and challenges encountered along the way.

Strategic Plans

The purpose of this section is to analyze the strategic priorities of the two universities by looking at their strategic plans. What are the similarities in strategies of each university? How are they strategically positioned in the current context? This corresponds to the second research question: What are the current strategic priorities of Canadian universities, as reflected in the strategic plans of UOttawa and UBC? Examining the strategies the universities have developed gives us a glimpse into their priorities and importance in certain areas. We can see themes throughout the plan and the many similarities in their context. This is not surprising considering the Canadian perspective for this research paper. Below are two tables outlining the different strategies outlined in each strategic plan.

Table 1, Summary of uOttawa strategic priorities, page 1

		University of Ottawa
Pillars	Themes	Four pillars: MORE AGILE, MORE CONNECTED, MORE IMPACTFUL, MORE SUSTAINABLE
	Objectives	16 objectives and 20 strategies
		Strategies
MORE AGILE	Be responsive and accessible with our program offerings	Optimize our program offerings and training opportunities to make them more attractive and responsive to the needs of tomorrow's generation of students Strengthen and expand experiential learning for every student.
	Be flexible and creative with program structures to enable students to complete programs in a timely way while maintaining high academic standards.	Improve the ability of students to complete degree programs in a timely way.
	Be innovative and comprehensive in our approaches to teaching and learning.	Continually renew and revitalize our pedagogy to take full advantage of ongoing methodological, experiential, and technological innovations.
	Be able to seize new opportunities: Demonstrate national and global leadership in major scientific and social challenges.	Mobilize the uOttawa research community to forge new frontiers of research.
MORE CONNECTED	Connect with the world: Increase the scope and scale of our international presence and influence.	Bring the world to uOttawa: Adopt a differentiated approach to recruitment to foster diversity and excellence.
	Connect with our identity: Create and promote a distinctive national and international identity that emphasizes our uniquely Francophone and bilingual status among research-intensive universities.	Strengthen our Francophone heritage and bilingual character.
	Connect with partners: Foster community engagement, as well as educational, research, and industrial partnerships with both the public and private sectors.	Connect with local, national, and global partners for research and knowledge mobilization.
	Connect with Indigenous communities: In light of the recommendations in the Indigenous Action Plan, make our commitment to Indigenous peoples fully visible, sustainable, and real.	Engage the University community to transform campus, culture, and community.
	Connect with technology: Develop a holistic digital vision and roadmap that will enable the transformation of higher education capabilities.	Ensure technology investments are institutionally driven and strategically aligned to reduce the administrative burden.

Table 1, Summary of uOttawa strategic priorities, page 2

MORE IMPACTFUL	Give ourselves the means to make a difference: Achieve a level of philanthropic success consistent with our ambition to distinguish ourselves as a top-tier research university in Canada.	Increase fundraising and endowment revenue and improve U15 benchmarking.
	Leverage our assets to make a difference: Develop potentially high-impact research initiatives at all levels of scale, from local to global.	Use faculty hiring to increase capacity, research strength, and impact in high-priority areas
	Making a difference starts here: Improve the student experience academically, culturally, recreationally, and socially to prepare students to go out into the world and make their mark.	Value the student's classroom experience. Foster a stronger sense of belonging.
MORE SUSTAINABLE	Nurture a sustainable campus culture that promotes overall well-being, embraces diversity, and fuels employee engagement.	Promote recreation and wellness throughout the campus, including through a comprehensive ethos of self-care and caring
	Develop a long-term financial sustainability framework.	Work in a transparent, deliberate, and collaborative manner to incorporate recruitment, capital, maintenance, and human resource requirements, as well as increased revenue generation in a long-term financial sustainability framework.
		Embrace innovation and change to reduce cost growth while maintaining quality.
	Ensure responsible and sustainable growth of our infrastructure	Ensure the safety, sustainability, and growth of campus physical infrastructure with a comprehensive medium- to long-term campus infrastructure renewal plan
		Ensure the security, sustainability, and growth of campus IT infrastructure with a comprehensive medium- to long-term IT infrastructure renewal plan.
Ensure responsible and sustainable security and safety planning	Enable optimal responses to and recovery from adverse situations	

Table 2, Summary of UBC strategic priorities

University of British Columbia	
Themes	Three Themes: INCLUSION, COLLABORATION, INNOVATION.
Strategies	20 strategies in 4 core areas: People and Places, Research Excellence, Transformative Learning, Local and Global engagement
PEOPLE AND PLACES	Attract, engage and retain a diverse global community of outstanding students, faculty and staff
	Create welcoming physical and virtual spaces to advance collaboration, innovation and community development
	Support the ongoing development of sustainable, healthy and connected campuses and communities
	Cultivate a diverse community that creates and sustains equitable and inclusive campuses
	Transform university-level systems and processes to facilitate collaboration, innovation and agility
RESEARCH EXCELLENCE	Enable interdisciplinary clusters of research excellence in pursuit of societal impact
	Strengthen shared infrastructure and resources to support research excellence
	Broaden access to, and enhance, student research experiences
	Improve the ecosystem that supports the translation of research into action
	Foster a strong and diverse research culture that embraces the highest standards of integrity, collegiality and service
TRANSFORMATIVE LEARNING	Facilitate sustained program renewal and improvements in teaching effectiveness
	Reframe undergraduate academic program design in terms of learning outcomes and competencies
	Expand experiential, work-integrated and extended learning opportunities for students, faculty, staff and alumni
	Facilitate the development of integrative, problem-focussed learning
	Strengthen undergraduate and graduate student communities and experience
LOCAL AND GLOBAL ENGAGEMENT	Deepen the relevance and public impact of UBC research and education
	Support the objectives and actions of the renewed Indigenous Strategic Plan
	Reach, inspire and engage alumni through lifelong enrichment
	Build and sustain strategic global networks, notably around the Pacific Rim, that enhance impact
	Co-create with communities the principles and effective practices of engagement, and establish supporting infrastructure

Similarities and differences

Agility, change, and responsiveness are seen in strategies that seek to prepare themselves for the changing reality of the higher education sector and appeal to tomorrow's students. Both institutions have a component of globalization or internationalization in that they wish to build their global networks and partnerships. On that same note, they have strategies to develop and engage their alumni community locally and abroad.

As members of the U15 group of research-intensive universities in Canada, UBC and uOttawa have a renewed focus on advancing their research capabilities. The University of British

Columbia (UBC) is currently ranked 47th on the Shanghai World University Ranking, which places it significantly higher than the University of Ottawa (uOttawa) in overall standings. This prestigious ranking reflects UBC's strong emphasis on research excellence and global impact.

UBC boasts impressive research accolades, including 3 Canada Excellence Research Chairs, 4 Canada 150 Research Chairs, and 204 Canada Research Chairs. These positions are supported by a substantial research income of \$658 million, highlighting UBC's robust funding and commitment to pioneering research initiatives. In contrast, uOttawa holds 1 Canada Excellence Research Chair and 89 Canada Research Chairs, with a research income of \$313 million. While uOttawa's achievements are commendable, UBC's research infrastructure and funding are notably more extensive.

UBC's research strategies are particularly comprehensive, focusing on academic excellence and achieving societal impact. This goal is reflected in their resource allocation and infrastructure development plans, which are designed to support sustainable growth and ensure the safety and modernization of their facilities. Given that UBC and uOttawa campuses are over 100 years old, these infrastructure plans are crucial for maintaining and enhancing their research environments.

Overall, UBC's approach to research is characterized by a strategic vision that prioritizes societal benefits, robust resource management, and long-term infrastructure development, setting it apart from uOttawa's research strategies.

The term "people-centric" aptly describes the strategies implemented by both universities to enhance the campus and student experience. These strategies are designed to foster healthy and connected communities, emphasizing recreation, wellness, and self-care to impact the overall student experience positively. This focus on well-being is integral to creating an academic and personal environment where students can thrive.

Moreover, this people-centric approach extends to diversity and inclusion. Both campuses boast diverse student populations and have implemented strategies to promote and support this diversity. These initiatives aim to support current students and attract future students from various backgrounds. The emphasis on diversity is crucial in creating an inclusive environment where all students feel valued and supported.

Central to this focus is the student experience, which aims to ensure that students succeed in their academic pursuits and future careers. Experiential learning has gained significant momentum over the past decade, with universities increasingly prioritizing work-integrated learning experiences. Programs such as CO-OP allow students to apply their theoretical knowledge in real-world contexts, ensuring they are well-prepared for the workforce upon graduation.

The primary mission of universities is to impart knowledge, and pedagogy is the means to achieve this goal. Both universities have developed strategies to ensure that their programs are continually renewed and focused on learning outcomes and core competencies. The COVID-19 pandemic was a major disruptor in the education sector, highlighting the critical role of technology. Universities demonstrated remarkable agility in transitioning to virtual learning environments, ensuring the continuity of education despite the challenges posed by the pandemic.

Given this context, it is not surprising that both institutions have robust strategies in place for pedagogy. uOttawa goes a step further by having a dedicated strategy for technology, aiming to integrate it into their operations and develop a comprehensive digital vision. Their strategic plan for the Information Technology sector is available on their website, reflecting their commitment to leveraging technology for educational advancement.

Finally, UBC's people-centric approach includes a strategy for lifelong enrichment for their alumni. This initiative underscores their commitment to supporting their graduates beyond their time on campus, fostering a lifelong connection with the university and encouraging continuous personal and professional development.

Some differences in the strategies of UBC and uOttawa are noticeable, prompting one to question why certain elements were not included by the other, especially since they appear to be fundamental components of strategic plans. One such element is the focus on financial sustainability and growth. uOttawa has a transparent strategy centered on revenue generation. In Ontario, the lack of funding for universities and the freeze on tuition fees create a fragile financial environment. Universities must find innovative ways to generate revenue growth while continuing to adapt to changes and improve their services.

One of uOttawa's key strategies for increasing revenue is the recruitment of students. They effectively combine their diversity and inclusion strategies with student recruitment efforts, encapsulated in their focus on "bringing the world to uOttawa." This approach not only enhances the university's cultural diversity but also contributes to its financial stability by attracting a broader student base.

In contrast, UBC has emphasized strategies aimed at fostering internal and external collaborations, which seem to be less prominent in uOttawa's plans. UBC's strategic focus includes facilitating collaborations and engagement with various stakeholders, both within the university and in the broader community. This collaborative approach is designed to drive innovation and address societal challenges, reflecting a strong commitment to leveraging partnerships for mutual benefit and societal impact.

UBC's desire to innovate and solve societal challenges is evident in their strategic plans. They prioritize creating an environment that encourages interdisciplinary research and collaboration, aiming to produce solutions that have a meaningful impact on society. This focus on innovation and collaboration sets UBC apart and highlights their proactive approach to addressing complex global issues.

Overall, while both universities have robust strategies, the differences in their approaches to financial sustainability, student recruitment, and collaboration underscore their unique priorities and strengths. uOttawa's emphasis on revenue generation and diversity in recruitment complements UBC's focus on collaboration and societal impact, showcasing the diverse ways in which institutions can achieve their strategic goals.

In the end, one of the primary strategies that preoccupy both UBC and uOttawa is the enhancement of their reputations. uOttawa aims to improve its standing within the U15 group of Canadian research universities, focusing on benchmarking and performance metrics to elevate its status. On the other hand, UBC seeks to deepen the public impact of its research and education, striving to ensure that its contributions are not only academically significant but also socially relevant and beneficial to the broader community.

According to Sutphen (2019), universities today find themselves on a continuum between traditional academic orientations and entrepreneurial approaches (Uslu, 2018), which can create a feeling that academics need to be entrepreneurial to be successful (Urban, 2019). This means

that institutions like the University of British Columbia and the University of Ottawa must balance providing high-quality education with managing entrepreneurial-type operations. This dual focus is essential for maintaining academic excellence while also fostering innovation and financial sustainability.

Higher Education Institutions are increasingly developing strategic plans that include internationalization strategies, such as the recruitment of international students. These strategies are crucial for enhancing the global presence and competitiveness of universities. However, the implementation of these strategies varies based on the unique settings and cultures of each institution (James, 2020). For instance, uOttawa's approach to internationalization might differ significantly from UBC's, reflecting their distinct institutional priorities and cultural contexts.

Nevertheless, it is important to recognize the critical role that universities play in the knowledge economy. They are key drivers of innovation, research, and education, contributing significantly to economic growth and societal development. As such, universities must compete in international markets to attract top talent, secure funding, and maintain their reputations as leading institutions of higher learning (Shattock).

In summary, while both UBC and uOttawa have distinct strategies for enhancing their reputations, they share a common goal of balancing traditional academic values with entrepreneurial initiatives. This balance is essential for their continued success and relevance in an increasingly competitive and globalized higher education landscape.

Discussion

The role those participatory mechanisms played in the development of the strategic plans was very important for both universities and was an essential aspect of each strategic plan. UBC's participatory mechanism for elaborating its strategic plan started in December 2016. Over 1000 people responded to an online survey to share their initial thoughts on UBC's future. Initially, a steering committee was created and was comprised of UBC faculty, staff, students, alumni, and community members. Together, they proposed a series of draft priorities for the plan. During the fall of 2017, they invited students and alumni to join in the dialogue surrounding the emerging plan. These were conducted through open houses and online surveys. This 18-month

process was finally translated into actions and deliverables and ready for implementation in the Spring of 2018. This 10-year plan has recently surpassed its halfway point, and the university is eager to revisit the plan and define its specific priorities and actions for the next three to five years. Beginning in the fall of 2024, the process will provide opportunities for members of the UBC committee to provide their input.

To have maximum engagement and input from its various stakeholders, the University of Ottawa launched an innovative strategic planning exercise. This year-long process began in November 2018 with the validation of key aspirations. It was followed by extensive brainstorming, ideation, and co-creation events, including 12 public assemblies and activities online. Next came the data analysis and, finally, the strategic framework. This framework was shared with the Deans, the executive committee of the Senate (including student and staff representatives), the Senate itself, and the Board of Governors,

“All of whom provided extensive feedback that contributed to developing an endorsed, robust and rigorous Strategic Framework, ready for formal presentation and approval to the university’s governing bodies” (uOttawa, n.p.).

Once approved, the Institutional Research and Planning office coordinated the development of a detailed strategic action plan. The University of Ottawa’s strategic plan, “Transformation 2030”, received unanimous approval on June 20, 2019.

Every university plan is different and is painted with the flavor of its institution. One aspect of the plans is for institutions to have areas of focus, themes, or priorities. This is the case with both UBC and uOttawa. These components will provide further insight into the institutions’ “personality” and highlight what is important to them. For UBC, they have three prominent themes with five areas of focus. Whereas uOttawa has four pillars under which all the goals are assembled.

One significant challenge neither university could have anticipated was the disruption caused by the COVID-19 pandemic. This unprecedented event required substantial adjustments and corrections to their plans. Universities had to quickly pivot to online learning, implement health and safety protocols, and find new ways to support students and staff. The pandemic highlighted

the importance of flexibility and resilience in strategic planning, as institutions had to adapt to rapidly changing conditions and unforeseen disruptions.

Canadian universities face numerous contemporary issues, including financial constraints, government scrutiny, and the need for accountability. The strategic plans of UBC and uOttawa provide insights into how these institutions navigate these challenges. Strategic planning is essential for universities to fulfill their societal mandates, manage resources effectively, and adapt to changing environments.

One of the most pressing issues for Canadian universities is financial sustainability. Both UBC and uOttawa have developed strategies to address economic constraints. UBC's strategic plan emphasizes responsible leadership and resource allocation, aiming to attract and retain a diverse community to increase revenue through tuition and research funding. Additionally, UBC highlights the importance of sustainable and healthy campuses to reduce long-term costs. On the other hand, uOttawa's strategic plan includes a transparent strategy for revenue generation, focusing on increasing student recruitment, particularly international students, to boost tuition revenue. uOttawa also prioritizes fundraising and endowment growth to ensure financial stability.

Government scrutiny and the demand for accountability are significant challenges for Canadian universities, which UBC and uOttawa address through their strategic plans. UBC's plan includes strategies for enhancing research excellence and ensuring the highest standards of integrity and accountability, aiming to foster a strong research culture and improve the ecosystem that supports the translation of research into action. Meanwhile, uOttawa's strategic plan emphasizes the importance of effective governance and leadership, aiming to improve transparency and accountability through better governance structures and processes. Additionally, uOttawa's plan includes strategies for enhancing the university's public image and demonstrating its value to society.

The COVID-19 pandemic has profoundly impacted higher education, necessitating flexibility and resilience in strategic planning. UBC's strategic plan highlights the need for ongoing assessment and adaptation, implementing strategies to support remote learning, and ensuring the continuity of education during disruptions. The plan also emphasizes the importance of

technology and innovation in enhancing the learning experience. Similarly, uOttawa's strategic plan includes a dedicated strategy for technology, aiming to integrate digital tools into the university's operations. uOttawa has developed a comprehensive digital vision to support remote learning and ensure that the university can adapt to future disruptions.

Diversity and inclusion are critical components of contemporary higher education, and both UBC and uOttawa have developed strategies to promote these values. UBC's strategic plan includes a commitment to creating equitable and inclusive campuses, aiming to attract a diverse community of students, faculty, and staff and to support their success through various initiatives. Similarly, uOttawa's strategic plan emphasizes the university's bilingual and multicultural identity, aiming to strengthen its Francophone heritage and promote diversity and inclusion through targeted recruitment and support programs.

Research excellence and societal impact are central to the missions of both UBC and uOttawa, and their strategic plans reflect these priorities. UBC's strategic plan focuses on enabling interdisciplinary research clusters and fostering a strong research culture, aiming to produce research that addresses societal challenges and has a meaningful impact on the world. Similarly, uOttawa's strategic plan includes strategies for developing high-impact research initiatives and leveraging faculty hiring to increase research capacity, with the goal of enhancing its research profile and contributing to societal well-being through innovative research.

Enhancing the student experience and promoting well-being are key priorities for both universities. UBC's strategic plan includes strategies for improving the student experience through experiential learning and community engagement, aiming to create a supportive and enriching environment for students with an emphasis on wellness and self-care. Similarly, uOttawa's strategic plan focuses on improving the student experience academically, culturally, and socially, aiming to foster a strong sense of belonging and support students' overall well-being through various initiatives.

The strategic plans of UBC and uOttawa provide valuable insights into how these institutions address contemporary issues in Canadian higher education. Both universities emphasize financial sustainability, accountability, diversity and inclusion, research excellence, and student well-being. Their strategic plans reflect a commitment to adapting to changing environments and ensuring that they continue to fulfill their educational missions. By aligning resources with

strategic priorities and engaging stakeholders, UBC and uOttawa demonstrate how strategic planning can help universities navigate complex challenges and achieve their goals.

Trends

Higher education needs are now aimed to a greater extent towards students to meet professional, vocational, continuing education and accrediting needs. This can be seen in the many campus missions that have been developed to be more responsive to external demands and expectations. The changes required in higher education have been varied, but the most commonly cited reasons found in the literature are: to become more market-oriented; to change the type of institution; to offer new courses; to increase capacity; to become a research institution; changes in curriculum; changes in management; a need to improve quality; financial problems (Chandler, 2013; Dust and Winthrop, 2019) and technology-driven growth of information and communication. The information and communication revolution has hit every sector over the last decade and higher education is no exception to this (Chandler, 2013). Globalization is another reason for reform. Underlying the advancement trends of technology and an acceleration of globalization, is competition. Accountability is another reason for change and reform. Nowadays, there is a greater push for accountability from the public and from elected officials. Accountability refers to more than just a lack of adequate performance measures. By being more accountable, local community colleges have the uncommon edge over universities as they often receive greater local support and can meet the immediate needs of the communities around them and thus maintain a sustainable level of government funds. (Chandler, 2013) (DeBoer, 2002).

Generally, most universities have mandates in three areas which are teaching and learning, research and scholarship, and community service. Federal funds provided to the provinces which have helped them to support their postsecondary education systems, have been declining and has appeared more and more in jeopardy in recent years. This has thrust upon the provinces greater pressure for efficiency, accountability, and self reliance in postsecondary education. One possible response to this new environment is increased effort at provincial planning for postsecondary education. Nevertheless, within just the past few years there have been attempts in several provinces to take stock of their postsecondary systems, and in a few cases to take some steps in creating a comprehensive plan or vision of the whole system or at least for major parts of it (Skolnikv, 1997).

Conclusion

Strategic planning and performance management are deeply interconnected, and effective results are challenging to achieve without a robust strategic planning process. Defining mid- or long-term objectives and corresponding operational actions is futile without verifying their achievement and results (Biondi, 2022). Higher Education Institutions often face the challenge of including ambitious aims in their strategic plans that may be difficult or impossible to deliver (Watson, 2000). While a strategic plan might appear comprehensive and feasible on paper, individuals may continue their usual practices without the necessary buy-in, resulting in minimal progress toward its implementation (Cowburn, 2005). Additionally, there has been a notable shift from students competing for limited university places to institutions actively seeking students to fill their spots. This dynamic underscores the importance of aligning strategic planning with performance management to ensure that plans are well-conceived and effectively executed.

The strategic planning processes of Canadian universities, particularly the University of British Columbia and the University of Ottawa, reveal a complex interplay of goals, challenges, and strategies that reflect broader trends in higher education. Like many others globally, these institutions are navigating an environment characterized by financial constraints, increased competition, and the need for accountability and transparency. UBC and uOttawa aim to address these challenges through their strategic plans while fulfilling their educational missions and societal mandates.

One of the key insights from analyzing these strategic plans is the importance of aligning resources with strategic priorities. Organizations should look at their own resources to give them a competitive edge (Szymaniec-Mlicka, 2014). Both universities need a dynamic and adaptable strategic planning process to respond to changing circumstances and unforeseen disruptions. This adaptability was particularly evident during the COVID-19 pandemic, which required significant strategic priorities and resource allocation adjustments. The ability to pivot quickly and effectively in response to such disruptions underscores the necessity of flexibility and resilience in strategic planning.

The strategic plans of UBC and uOttawa also highlight the critical role of stakeholder engagement in the planning process. Both universities employed extensive participatory mechanisms to gather input from faculty, staff, students, alumni, and community members. This inclusive approach helps ensure that the strategic plans are realistic, achievable, and have the buy-in from those who will be implementing them. By involving stakeholders at all levels, universities can create a sense of ownership and commitment to the strategic goals, which is essential for successful implementation.

Financial sustainability is another major theme in the strategic plans of both universities. The economic pressures Canadian universities face, exacerbated by government funding cuts and tuition freezes, necessitate innovative revenue generation and resource management approaches. uOttawa's strategic plan, for example, includes a transparent strategy centered on revenue generation through student recruitment and fundraising. This focus on financial sustainability is crucial for maintaining the institution's long-term viability and ensuring that it can continue to fulfill its educational mission.

In addition to financial sustainability, the strategic plans of UBC and uOttawa emphasize the importance of research excellence and societal impact. Both universities are committed to advancing their research capabilities and leveraging their research to address societal challenges. UBC's strategic plan, for instance, prioritizes interdisciplinary research and collaboration to produce solutions with meaningful societal impact. This focus on research excellence and societal impact reflects the broader trend in higher education towards greater accountability and relevance to societal needs.

The strategic plans also underscore the importance of diversity and inclusion in creating a supportive and enriching environment for students and staff. UBC and uOttawa have implemented strategies to promote diversity and inclusion, recognizing that a diverse and inclusive campus is essential for fostering innovation, creativity, and academic excellence. These strategies aim to attract and support students from various backgrounds, ensuring that all students feel valued and supported.

Another significant aspect of the strategic plans is the emphasis on experiential learning and the student experience. Both universities have developed strategies to enhance the student experience through work-integrated learning opportunities, such as co-op programs and

initiatives to improve student well-being and sense of belonging. These efforts are designed to ensure that students are well-prepared for the workforce and can academically and personally thrive.

The strategic plans of UBC and uOttawa also highlight the importance of technology in modernizing and enhancing the educational experience. The COVID-19 pandemic accelerated the adoption of digital technologies in higher education, and both universities have robust strategies to integrate technology into their operations and pedagogy. uOttawa, for example, has a dedicated plan for developing a comprehensive digital vision, reflecting its commitment to leveraging technology for educational advancement.

Despite the similarities in their strategic priorities, there are notable differences in the approaches of UBC and uOttawa. UBC's strategic plan strongly emphasizes fostering internal and external collaborations, while uOttawa's plan focuses more on revenue generation and financial sustainability. These differences reflect each institution's unique contexts and priorities, highlighting the diverse ways universities can achieve their strategic goals.

In conclusion, the strategic planning processes of UBC and uOttawa provide valuable insights into the contemporary issues facing Canadian higher education. These strategic plans are essential tools for navigating the complex and dynamic environment in which universities operate. By aligning resources with strategic priorities, engaging stakeholders, and emphasizing financial sustainability, research excellence, diversity and inclusion, experiential learning, and technology, universities can effectively address their challenges and fulfill their educational missions. The experiences of UBC and uOttawa underscore the importance of a dynamic and adaptable strategic planning process that can respond to both anticipated and unexpected challenges, ensuring the long-term success and relevance of higher education institutions. Ultimately, both universities employ the various components, as outlined by Hinton (2012), in their elaboration, and are representative of sound strategic plans and both universities developed ambitious and inspiring strategic plans.

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