



**Wisconsin Union
Strategic Plan 2005-08**
Mission, Vision and Values

Photo by Jeff Miller/DW-Madison University Communications



Overview

The students and staff of the Wisconsin Union have long been advocates for change and proponents of an inclusive process with respect to decision-making – and the 2005-2008 Strategic Plan is no exception.

Building on the concepts articulated in the previous strategic plan, the 2005-08 Plan was developed with an expanded level of input from across the organization and employed a planning tool new to the Wisconsin Union – the *Balanced Scorecard*. With this as a backdrop, the organization reviewed its mission, vision and values statements, assessed the current environment, defined its operating perspectives in four key areas, developed strategic themes and initiatives, and laid the groundwork for performance-based measurements tied to those initiatives. What follows is a consolidation of that important work.

Union History



Before the Union undertakes any new direction, it is valuable to briefly chronicle its history on the campus.

The Union originated on the campus as an

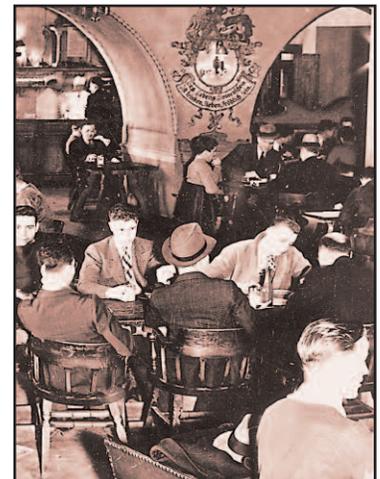
idea, expressed in the inaugural address of then-President Charles Van Hise in 1904. By 1907, the idea gained momentum and the Iron Cross Society founded the Wisconsin Men's Union. A permanent physical structure would come in 1928 with Memorial Union, the first building built on the campus entirely by private support. Most students enrolled at that time selflessly donated \$50 for a building they knew would not be built until after they graduated. Alumni donated the remaining needed dollars by responding to the first capital fundraising campaign conducted by the University.

The Union's constitution – approved by the student body, the faculty, and the Board of Regents – placed its

governing authority in a student-majority board, something unheard of at the time. The Union enjoyed many "firsts" in its early years, including such important items as the Union Theater, the art gallery, Hoofers, intercollegiate games tournaments, and the sale of beer.

The Union's programs and facilities grew through the years, with several important expansion projects. The Theater was added in 1939, the Lakefront cafeteria was expanded substantially in 1958, and Union South was added in 1971. Since 1990, the Union has experienced a rapid expansion in its satellite units across the campus, placing half a dozen delis in various academic buildings.

While embracing positive change, the Union has consistently maintained its role as the Division of Social Education for the campus (designated by the Board of Regents in 1935) – serving as the social, cultural, and recreational center of campus life.



Union Organization

The Wisconsin Union is organized into four distinct operating areas: Administration & Marketing, Facility Management, Food & Retail Services, and Social Education. All areas employ the services of both full and part-time staff, student employees and volunteers in various capacities.

The governing body of the Wisconsin Union, the Union Council, is a 15-member, student-majority board that meets monthly to approve policy recommendations and set a broad philosophical direction for the Union.

Setting direction for the daily operation of the Union is the Union's Leadership Team, composed of the Director, the Associate Director, the four area Assistant Directors, and the student President.

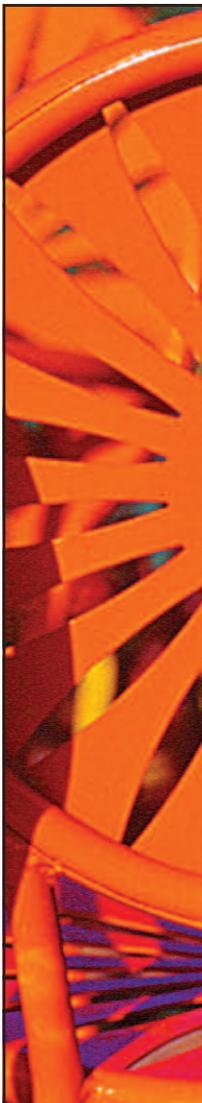
An organizational chart for the Wisconsin Union can be found below.

Union Operation

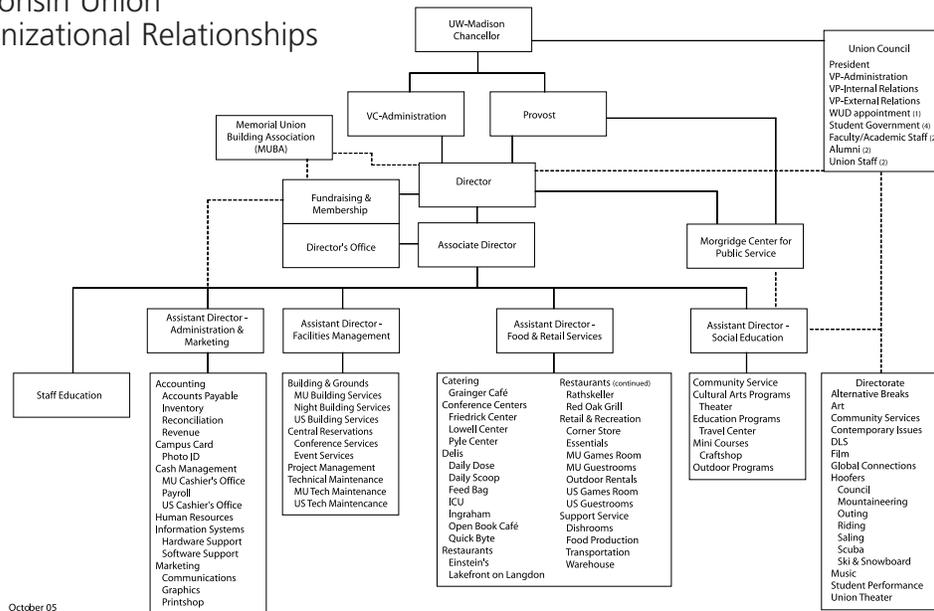
The Wisconsin Union annual operating budget is approximately \$23 million. Its main sources of revenue, in descending order, are food & retail sales, student segregated fees, program revenue, and recreational revenue. Its expense categories, in descending order, are staffing expenses, cost of goods sold, and general supplies and expenses.

The Union's Leadership Team submits an annual budget for Union Council's approval in late winter/early spring. This budget sets the Union's segregated fee recommendation for the upcoming year and is then forwarded to the Student Services Finance Committee for their advisory recommendation before being forwarded to the Chancellor for approval.

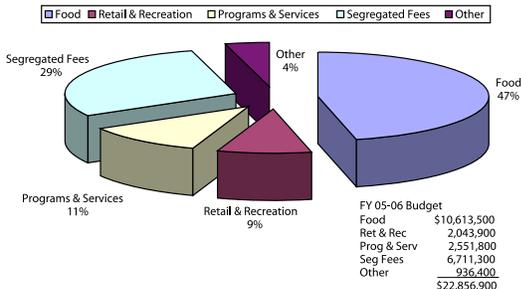
A budget chart for the 2005-06 fiscal year can be found below.



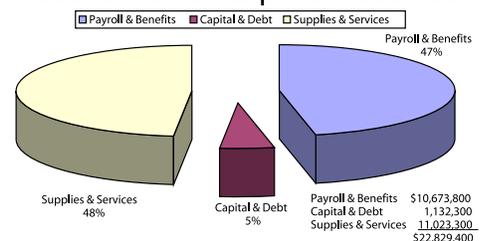
Wisconsin Union Organizational Relationships



Wisconsin Union Revenue 2005-06



Wisconsin Union Expenses 2005-06



Connections to UW-Madison Strategic Plan

The Union Council is responsible to the Chancellor and its governing authority is overseen by the Provost, through the Union Director. However, its daily operating activities are aligned with the other auxiliary operations on the campus and are overseen by the Vice Chancellor for Administration. In each of these relationships, the Union plays a role in advancing the five priorities of the campus' overall strategic plan:

I. Promote Research

- The annual Undergraduate Research Symposium is sponsored in part by the Morgridge Center for Public Service, a part of the Wisconsin Union.
- Morgridge Center service learning and community-based research initiatives continue to increase in number.

II. Advance Learning

- Educational programming sponsored by the Wisconsin Union Directorate through such things as the Union Theater, Mini Courses, Hoofers, Distinguished Lectures Series, etc. brings "out-of-class" learning alive on a daily basis. Directorate sponsors nearly 1,000 events during the year.
- Student internships, graduate assistantships and student employment provide hands-on learning and opportunities to apply classroom knowledge in a real world environment.

III. Accelerate Internationalization

- The Central Reservations Office assists in the planning, coordination and presentation of numerous international academic conferences every year.
- The Travel Center in Memorial Union continues to provide advising and support for study, work, and travel abroad opportunities.
- The Annual World Music Festival is held in mid-September on the Terrace and in the Union Theater.
- The WUD Global Connections Committee sponsors International Conversation and Coffee Hour at Union South every Friday afternoon.
- Union Theater sponsors the Travel Adventure Series and World Stage Series.
- GUTS (Greater University Tutorial Service) sponsors a conversational English program at Union South.

IV. Amplify the Wisconsin Idea

- Serving as a focal point for University guests from around the state, the country, and the world is an integral part of the Wisconsin Union mission.
- Wisconsin Idea Fellowships are offered through the Morgridge Center for Public Service.

V. Nurture Human Resources

- The Wisconsin Union motto is: Light is increased through human relationships. Making and nurturing human connections among a diverse group of students, faculty, staff, and alumni is the Union's core mission. Whether on the Terrace, in the Union Theater, or at Badger Bash on football Saturdays, the Union consistently represents a cross-section of the best that UW-Madison has to offer its community.

Union Strategic Planning Process for 2005-08

When the Union began the process of using the *Balanced Scorecard* for this most recent strategic planning process, it was evident that there would need to be a group of individuals identified who would learn the various elements of the scorecard in order to move the organization through the process. This group, the Strategic Planning Steering Committee (identified on the back cover), met weekly for several months and called the Union's larger Leadership Staff together on a monthly basis to move through the various levels of the scorecard process.

Some of the tenets that guided the Steering Committee's work were:

- The elements of the plan needed to be memorable and easily understood by a broad cross-section of staff and customers
- The plan needed to build on the 2002-05 Strategic Plan
- The plan needed to gather input from across the organization at several points during the process
- The specific initiatives in the plan needed to be measurable
- There needed to be a true sense of balance between our four operating perspectives – customers, financial, staff development, and internal processes
- Everything in the plan needed to move us toward our vision – "To be the heart and soul of a great university."

What follows is the culmination of that particular work and the presentation of the Union's 2005-08 Strategic Plan.



Wisconsin Union Strategic Plan 2005-2008

Mission

Our mission statement is an expression of why we exist.

Making lifetime connections to the campus, one person at a time

This statement embodies an outstanding measure of success of our community-building purpose. Not only are we called to create community between and among the various members of the University community, we also want those connections to be meaningful. If we are able to make a lifetime campus connection with each person we touch, then we have indeed accomplished something truly remarkable.

Values

Our values are an expression of what we believe.

Respect

The Wisconsin Union values respect for all people, history and traditions. Through openness, we will create, nurture and maintain diverse and civil relationships within our university and world communities.

Relationships

The Wisconsin Union values and depends upon the building of diverse relationships between students, staff and the community. Our strong partnerships allow us to give individualized attention to our customers and guests, creating lifelong connections.

Leadership

Through our tradition of providing exceptional services and experiences, we create opportunities for developing and nurturing leaders.

Learning

We value out-of-classroom learning as an integral part of a great education. We promote lifelong learning that challenges the university community to maximize its potential.

Performance

We are committed to efficient and ethical business systems, superior customer service and strong financial performance.

Vision

Our vision statement is an expression of what we want to be.

To be the heart and soul of a great university

This statement underscores the central role we seek to play in the life of one of the world's exceptional institutions of higher education. If successful, there can be no greater compliment to the work we undertake than to be thought of as the lifeblood of the campus – helping to give full meaning to the academic mission of the University.

Operating Perspectives

Our operating perspectives define how we accomplish our work in four key areas – customer service, financial performance, staff development, and internal processes. They help guide our daily decision-making and frame the path we will take to achieving our vision of becoming the heart and soul of UW-Madison.

Customers

(To achieve our Vision, how should we appear to our customers?)

- Our core customers are students, faculty, staff, and lifetime members. In meeting their needs we will also meet the needs of the larger community.
- Our core businesses are programs (broadly defined), food and meeting spaces.
- Building intimacy with our customers is necessary to fulfill our Mission & Vision.

Financial

(To financially sustain our Mission, what must we focus on?)

- Our sustainable and consistent financial model will be less dependent on variable summer revenue and more dependent on campus activities.
- We will generate a net profit each year to help fund the Facilities Improvement Plan and other organizational needs.

Staff Development

(To achieve individual and organizational success, what must we do?)

- Foster individual success through on-going direction, coaching, training, and continual skill development.
- Create workplace conditions fostering organizational success.

Internal Processes

(To support our Customer, Financial and Staff Development Perspectives, we need to excel at...)

- Administrative processes that support our values.
- Effective management of departmental and cross-functional initiatives.

Strategic Themes and Initiatives

Our strategic themes and initiatives are based on an assessment of our current operating environment and reflect what the focus of our work must be in the coming three years in order to move us toward being the heart and soul of a great university.

It is important to note that these initiatives represent our current thinking. There is an expectation that this plan may evolve over the next three years as we respond to and anticipate changes in our operating environment. However, these four themes and eight initiatives will continue to serve as the foundation of our plan during the next three years

#1. Build a strong external and internal identity while capitalizing on our prime locations, traditions, and services

- Improve understanding of and promote our tradition of strong shared governance and student/staff partnership.
- Tell stories that demonstrate the Union as the “heart and soul” of campus.

#2. Expand our knowledge of our external and internal customers. Turn their needs into action.

- Apply new customer knowledge to key campus needs for events, services, and gatherings.
- Increase understanding of need to develop and improve facilities and secure the financial support to do so.

#3. Strengthen external and internal relationships and collaborations that enhance the Union

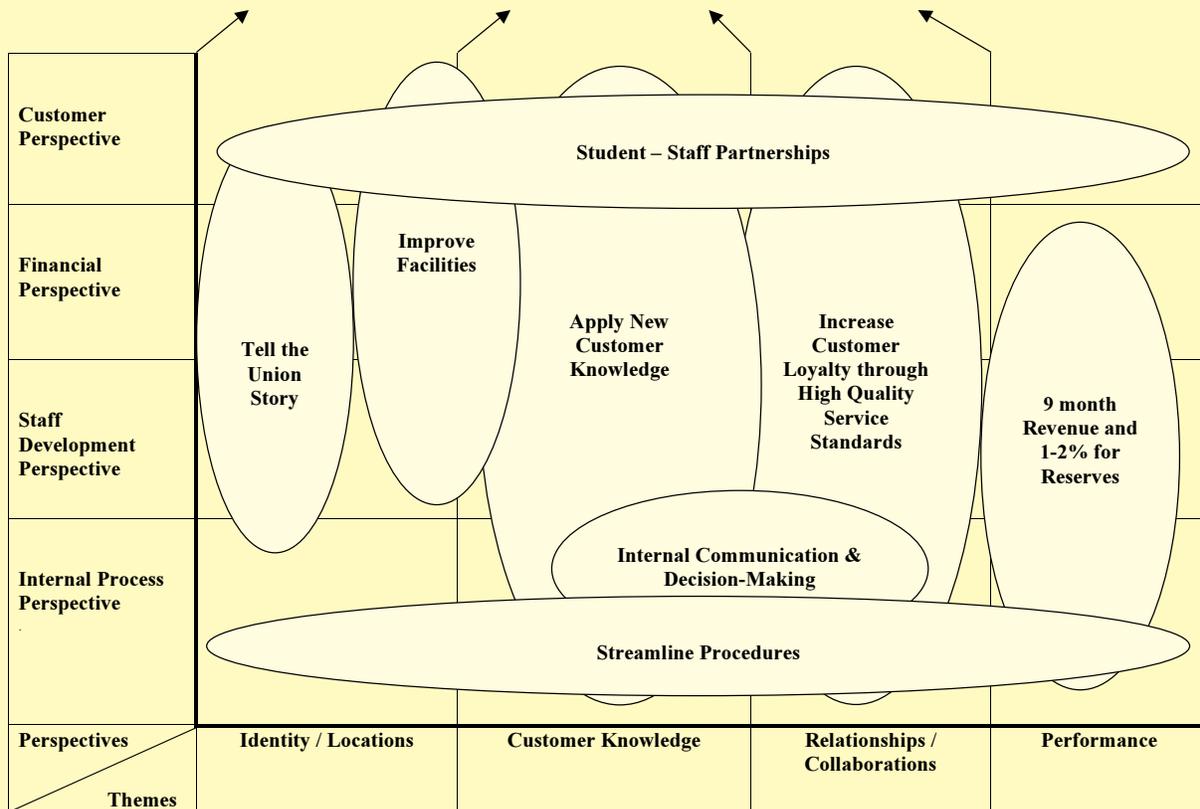
- Build customer loyalty through consistent, high-quality, service.
- Enhance internal communication and informed decision making.

#4. Deliver strong financial performance

- Grow 9-month revenue and generate 1-2% net revenue for reinvestment.
- Streamline procedures, apply new technology and reduce duplication.

Wisconsin Union Strategy Map

To be the heart and soul of a great university.



09/2005

When our four operating perspectives and our four strategic themes are placed on a grid, the resulting layout of our strategic initiatives produces a strategy map.

Our strategy map demonstrates the inter-connected and inter-dependent nature of our initiatives. In order for the Union to move toward its vision of becoming the heart and soul of UW-Madison, it will be necessary for us to excel in each of these areas. We will need to look for ways to support initiatives across the perspectives and among the themes. Our measures of success will not be in any one area, but across the strategy map.

There will be times when the entire organization is focused on particular elements of the strategy map during the three-year period from 2005 to 2008. However, there will also be times when particular areas, divisions, units, or departments will be focused on a strategic initiative that is important for them at that time, independent of the current organization-wide focus. That is not only acceptable, it is encouraged.

The strategy map serves as a lens through which we will focus our work over the next three years. It should not be seen as a roadblock to new initiatives, but rather as a tool for understanding the preferred context for all of our initiatives in the coming years.

Performance Measures

One of the final steps in the *Balanced Scorecard* process is to identify performance measures for each of the strategic initiatives and then track and measure these data points over time in order to demonstrate movement toward achieving the desired initiative (and in turn movement toward our vision).

The organization as a whole, as well as individual areas, divisions, units, and departments, will be asked to identify predictive data measures and confirming data measures for the initiatives that impact their work. These measures will form the basis for the demonstrated outcomes of our scorecard. Some measures will remain constant over the three-year length of the plan while others may change each year.

The Union will build its scorecard incrementally over the coming year, in some cases establishing baseline data in the first year of the strategic plan in order to support more analytical assessment of data in the last two years of the plan. In all cases, the performance measures will be shared with the entire organization; both prior to implementation and after the data has been collected. The measures will be distributed as supplements to this plan on a yearly basis.

Conclusion

The Wisconsin Union's 2005-08 Strategic Plan, using the *Balanced Scorecard* as a tool, is designed to move the organization toward success. The students and staff, working in partnership, will focus their work and measure their progress across the following strategic initiatives in the coming three years:

- Promote the Student-Staff Partnership
- Tell the Union Story
- Apply New Customer Knowledge
- Improve Our Facilities
- Build Customer Loyalty
- Enhance Internal Communication
- Grow 9-Month Revenue
- Streamline Procedures

Our mission – Making lifetime connections to the campus, one person at a time – will serve as the foundation for these initiatives and provide the impetus for our success as we move toward our vision – To be the heart and soul of a great university.



Wisconsin Union
Experiences for a lifetime

The Strategic Planning Steering Committee

Purpose

Learn and teach the *Balanced Scorecard*, set overall direction and implement overall plan as a part of the Wisconsin Union's strategic planning process.

Membership

Mark Guthier
Co-Chair

Hank Walter
Co-Chair

Jay Ekleberry
Facilitator

Georgia Pollard
Administrative Support

Susan Dibbell

Mary Hoddy

Nancy Kujak-Ford

Richard Pierce

Adam Robinson

Scott Topel

Margaret Tennesen

Julie Vincent

Debra Whitesel

George Watson
*Consultant, UW Office of
Quality Improvement*