

Strategic Planning
1997-2002
Full Report

School of Management
The University of Texas at Dallas

Vision

An institution of choice,
preparing tomorrow's business leaders and
expanding the frontiers of management knowledge.

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School of Management Mission

The School of Management's mission is to meet the challenges of a rapidly changing, technology-driven, global society by partnering with the business community to:

- deliver high quality management education to a diverse group of undergraduate and graduate students and practicing executives;
- develop and continuously improve programs advancing management education and practice;
- conduct research enhancing management knowledge.

Strategic Plan

The School of Management was established in 1975 as the academic unit responsible for the M.S. in Management and Administrative Sciences and M.A. in International Management Studies degrees authorized in 1973, Ph.D. degrees in Management Science and International Management Studies authorized in 1975, and to start an upper division program leading to a B.S. in Business Administration. The School added an MBA in 1982 and an Executive MBA in 1992. Lower division instruction was added in 1992 in conjunction with UTD's expansion to include a full undergraduate program. And in 1996 the School added the Cohort MBA, a full-time MBA program in which students take all their courses together in a fixed sequence.

Since its inception, the School of Management has offered a range of degree options and program formats designed to serve the diverse needs of a student population primarily composed of working adults, but also including traditional full time graduate students and, more recently, residential undergraduate students. Starting in 1992, programs were added to meet the scheduling needs of executives (Executive MBA), internal consultants with international travel schedules (Organization Development and Change Management M.S. Program), and corporate executives unable to attend regular campus meetings because of international assignments or extensive travel (Masters in International Management Studies). UTD's School of Management has offered "something for everyone," and its success to date is built on "convenience."

With over 20 years of operating history and rapid development in the Telecom Corridor area surrounding the campus, UTD's School of Management has become a major provider of management education to corporations with worldwide operations and global name recognition. Hundreds of executives working for Texas Instruments, Nortel, EDS, Ericsson, Alcatel, Fujitsu, DSC, J.C. Penney's, Arco, Frito-Lay, Rockwell International, Cyrix, Convex Computers/Hewlett-Packard, Lennox, and other global corporations have received management degrees from UTD. And hundreds more will attend UTD in the future as the Telecom Corridor area emerges to dominate R&D in wireless telecommunications and the Dallas-Fort Worth Metroplex is recognized as one of the great business centers in the global economy.

The School of Management is focused on the future. The School's first 20 years were a period of turbulent growth: business community expansion was an opportunity, every educational program worth a try, and an energetic faculty made up of creative scholars and innovative educators was willing to take on any challenge. But as the School enters its third decade as a now established provider of management education, its challenge is making the transition from start-up institution to national visibility. It is with the challenges of this third decade in mind that this strategic plan was formulated.

Strategic Vision

The strategic vision formulated by the Strategic Planning Committee is a bold statement:

*An institution of choice,
preparing tomorrow's business leaders and expanding the frontiers of management knowledge.*

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This vision captures the aspirations for 2005, the 30th anniversary of the School's founding, for everyone invested in the School of Management, faculty, students, business advisors, and UTD's administration.

Three important ideas are expressed in the vision statement. The first is "institution of choice." This statement very simply captures an aspiration to be a high quality school, to be a school chosen by students as a preferred institution for management training and by faculty as a preferred institution for scholarship and teaching. This is in contrast with the School's current status as an "institution of convenience." Making this transition is a tremendous challenge.

The second key phrase in the vision is "preparing tomorrow's business leaders." This statement implies programs and curricula that not only provide technical skills, but also prepare individuals to lead. We do not expect every UTD graduate to become a CEO, but this vision does indicate that every UTD graduate should be prepared lead as well as manage, to be able to recognize the need for change, to have the understanding necessary to elicit the cooperation of others in change efforts, and have the personal skills necessary to make change happen in complex organizations. We want our students to lead change, not fall victim to it.

The third phrase in the vision, and the foundation for success in all the School's endeavors, is "expanding the frontiers of management knowledge." This captures the School's commitment to research that is innovative and path breaking, research that creates knowledge where there was once confusion and uncertainty. As in all efforts to innovate and create, a great deal of the research done by the School's faculty in the future will fall short of this mark. But it is the process of striving to meet this goal that produces breakthrough work and ensures the School's education programs are on the frontiers of knowledge.

While this vision is ambitious, it is also achievable. The School of Management has the good fortune of being located in one of the fastest growing business and technology centers in the world in a state that is creating jobs faster than any other in the U.S. This, and the challenges the School faces in achieving its vision, are discussed in the next section.

Current Strategic Position

The planning process began with an evaluation of the School's current strategy and an assessment of its current strengths and weaknesses (see Appendix A for details of the strategic planning process). The complete analysis can be found in Appendix G, Tables G1 and G3. The major strategic issues highlighted by this analysis are summarized here.

There is no debating the potential of UTD and the School of Management's pivotal role in achieving this potential. A significant number of globally renown corporations are "in the neighborhood," employment in the Telecom Corridor area along U.S. 75 and north of Inter-

state 635 is expected to double in the next 20 years, and State Highway 190 is going to run right through UTD's backyard, encouraging east-west development in Richardson and Plano and enlarging the pool of employed individuals seeking management education with easy access to UTD.

The major threat to the School of Management is competition, and there is no doubt that competitors are aware of the growth in North Dallas and of the potential demand for management education. UTD's major local competitors, SMU and the University of Dallas, have both opened facilities in the vicinity, smaller schools in the area, such as Amber University and Dallas Baptist, have been very aggressive in offering programs within companies and giving credit for work experience, and the emergence of distance learning technologies are making it possible for universities worldwide to reach out to the technologically advanced. And potential UTD students working in local companies are by and large technologically advanced.

The School of Management has competitive strengths, and it must capitalize on these strengths if it is to become a dominant institution. These include a seasoned, adaptive faculty willing to embrace change, strong grassroots support in the business community, and a location that is very convenient for employees in companies that value higher education. In addition, the School has a large base of alumni that respect the education they have received, a business community that is interested in partnerships, and its own potential global reach based on strengths in international business and partnerships with major global corporations.

The School's ability to leverage its strengths, however, is limited by weaknesses that have hurt its local image. These include a reputation for "poor service," a perception in the business community that UTD is an "ivory tower" institution, and a perception that UTD is "just another commuter school." So, although the School of Management has a large number of alumni, the School has not done a good job of soliciting their support. Similarly, the School has relatively limited relationships with local companies, and local companies have seen no particular need to invest in the School and its programs, in part because global companies also view higher education programs with a global perspective that puts UTD up against established institutions like MIT, UT Austin, Rice, Stanford, University of Illinois, and the University of California, just to name a few.

Although the challenge of transitioning the School of Management from "an institution of convenience" to "an institution of choice" is daunting, the problems the School faces can be addressed. It is possible for the School to improve its services to students, to establish productive partnerships with the business community, and to elevate the perception of its quality. And the resources that are critical to success — quality faculty, a university commitment to excellence, a supportive and appreciative business community, and a large number of alumni working in the business community — are already in place. If they were not, it would be next to impossible to achieve the School's strategic vision.

The School of Management has built the core competencies necessary for future success over the past 20 years. The School's location and convenience advantages are a foundation for building excellence, but achieving the School's strategic vision is going to require a com-

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petitive mindset that goes beyond locational advantages. Because recognized excellence in business education is more than classroom excellence, it is excellence in advising, placement, internships, faculty accessibility, career counseling, the integration of business needs in curriculum planning and all the other service elements that impact perceptions of the School by students, their employers, and the wider business community. It is in the delivery of these services that institutions create loyal alumni, ongoing relationships with employers, and dialogues with the business community. This is where the School of Management must compete if it is to become an institution of choice, because this is where other schools are competing to overcome UTD's location advantages.

Mission Statement

The School's mission statement identifies how the School will compete.

The School of Management's mission is to meet the challenges of a rapidly changing, technology-driven, global society by partnering with the business community to:

- deliver high quality management education to a diverse group of undergraduate and graduate students and practicing executives;
- develop and continuously improve programs advancing management education and practice;
- conduct research enhancing management knowledge.

First, the mission statement recognizes the School serves a business community that is global, technology-driven, and operates in a world of continuous change. Second, and more important, the mission indicates the School will partner with the business community in all endeavors, a statement that recognizes the important role the business community can potentially play in the School's future and acknowledges that success is not something the School of Management can achieve on its own.

The three bullets in the mission statement define the School's educational and research focus, and in many ways these are very conventional. But important choices are also evident. First, the School's mission affirms an ongoing commitment to meeting the educational needs of a diverse student body made up of individuals ranging from traditional undergraduates to experienced engineers seeking to switch careers to experienced managers looking for the educational foundation they need to accelerate their career progress. These students have diverse motives for attending UTD, but they have a common goal: a quality business education that opens up opportunities, whether in internal or external job markets. These students, with their diverse motives and common objective, are the foundation of the School of Management's enrollments, and this is a group that the School will continue to serve, both because UTD is a public university and because the very diversity of these students enriches the educational environment at UTD.

In addition, the mission reaffirms a commitment to program innovation and basic research. Because the companies the School serves operate in a rapidly changing, global economy, the School must be prepared to meet new challenges with new programs that address business needs and research that deals with business problems that are the byproducts of change. The firms the School of Management serves must change continuously to remain competitive, and if the School is to be as good a partner as it is expecting local firms to be, it must be just as innovative and responsive to the changing competitive landscape.

Strategic Objectives

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If the School of Management is to achieve its vision while remaining true to its mission, there are a number of specific objectives that its strategy must address. The Strategic Planning Steering Committee identified five strategic objectives that are consistent with the School's mission and support the vision:

- Maintain and build on existing quality of programs and faculty.
- Build on existing business support and establish strategic partnerships.
- Increase alumni activities and involvement.
- Heighten educational and research visibility.
- Expand resources and build infrastructure to support excellence.

These high level objectives capture important principles. First, they reflect a recognition that a reputation for quality must be built on a dedication to quality in every aspect of the School's operations. And this recognition is what makes this a strategic effort rather than a public relations program. All parties involved in the strategic planning effort realize that fulfilling the School's vision and mission starts with building quality into our curriculum, student services, teaching and administrative processes, and that if we cannot achieve this first objective, little else that is proposed in the strategic plan will prove effective. Although visibility is a problem that needs to be addressed, the assumption is that the first step in building a reputation for excellence is to ensure a dedication to quality.

The second major principle embodied in these objectives is a recognition that the School's success depends as much on key external stakeholders as it does on the School's own efforts. Chief in importance are the contributions of the business community and the School's alumni. Individual decision makers in these constituencies can have a significant impact on the School's efforts to provide internships to students, improve placements opportunities, establish research relationships, and achieve funding levels that support excellence. In addition, it is the opinion of individuals in these key constituencies that is the foundation of the School's broader reputation. If the School's alumni and the businesses that employ them do not think highly of the School, then no one will.

Strategic Priorities

The Strategic Planning Steering Committee — with review by the Strategic Planning Committee — developed a detailed list of strategic priorities for the next five years that address the strategic objectives. These are listed in Table 1. These priorities are not meant to define an end point, but rather are the goals for the next five years. These include:

Recognized Quality: These goals address deficiencies identified in the SWOT analysis and build on existing strengths. Student services, especially advising and placement, are perceived as a School weakness, so this is an area where strategic actions are necessary. Other priorities — for instance, faculty quality — build on established strengths, but acknowledge that maintenance of quality also has to be a strategic priority in the midst of all the changes anticipated over the next 5 years. And the priorities here also include a continued dedication to quality research, a discipline that is fundamental to the quality of the School's educational programs.

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Business Partnerships: Although the School has established some important relationships with the business community, feedback from the business community has characterized these as “tactical rather than strategic.”¹ The implication of this statement is that local firms do not see the School as

¹ This comment was made by a member of the High Technology Strategic Management Forum representing EDS during a discussion of university–business partnerships.

Table 1. Strategic Objectives and Priorities for 1997-2002

<p>Recognized Quality</p> <ul style="list-style-type: none">• create and maintain student services of the highest quality• maintain and improve the quality of students and faculty• improve and maintain program quality as assessed by alumni and employers• achieve concrete recognition of educational quality by corporate recruiters• raise and maintain School's research profile
<p>Business Partnerships</p> <ul style="list-style-type: none">• develop and strengthen business partnerships• increase business involvement in School activities• expand hiring, perception of School as provider of quality employees• increase in research funding from businesses• more extensive engagement with student projects• more joint development of education programs and executive education• develop strategic partnerships with major firms
<p>Alumni Involvement</p> <ul style="list-style-type: none">• establish and expand School of Management Alumni Association• encourage Executive Alumni participation in SOM Alumni Association• increase alumni donations to School• increase alumni involvement in placement and internships
<p>School Visibility</p> <ul style="list-style-type: none">• establish a School communications and public relations program• expand placement activity, career services, and marketing of graduates• increase number and quality of companies hiring at UTD• improve faculty visibility in business community• establish reputation for excellent executive education• improve ranking by other business school deans• raise visibility of faculty's research

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Resource Expansion

- increase state revenues through enrollment increase
 - increase in discretionary funds from donations and endowment
 - increase in executive program funds
 - expand external research funding
 - establish and implement programs supporting human capital development
 - improve and further develop School facilities and infrastructure
-
-

Management as a strategic partner, but rather as primarily interested in immediate projects and short term fundraising. The priorities defined here are an attempt to get beyond relationships of immediate advantage by developing true strategic partnerships. Toward this end, priorities are defined for developing existing business relationships by increasing the involvement of local firms in business school functions, increasing reliance on the School of Management as a hiring institution, increasing reliance on the School as a source of business research, and more joint involvement in program development and continuing education. Finally, priority is given to the development of true strategic partnerships with major firms located in the area, including more extensive consultation and joint investment in program development.

Alumni Involvement: The best U.S. business schools are championed by their alumni, who not only recommend the school to potential applicants and provide jobs, but also are a source of significant discretionary funding that supports research, infrastructure and faculty development, and program innovation. Experience indicates these same alumni will not provide the same level of support through a general, campus wide alumni association, instead preferring to work with and through groups directly affiliated with the school they attended.² Accordingly, the School of Management's strategic priorities include establishing a specific Management Alumni Association, encouraging active participation by Executive Program graduates, developing alumni giving, and encouraging alumni to become actively involved in a wide range of placement related activities, including identifying internship opportunities and providing career mentoring.

School Visibility: UTD is often characterized as a "well kept secret," an anonymity that reflects both the age of the institution and the reality that many people, even in Dallas, are not aware of what UTD has to offer. This lack of visibility also characterizes the School of Management, which is not well known beyond North Texas. The priorities for addressing this problem include establishing an integrated communications and public relations program, putting greater effort into making companies aware of the School's graduates, faculty research, executive programs, and of other companies involved with the School, and raising national awareness among business school deans — a group of opinion makers often polled in the development of national rankings — about UTD and its programs.

Resource Expansion: While UTD is supporting the School's efforts to improve its national and international standing, at some point the School needs to start generating the additional resources necessary to operate with minimal campus support. The School's strategy is ultimately dependent on the human capital

² There is reason to believe that decoupling the business and campus alumni groups benefits the campus group as well because it frees the campus group to focus on philanthropic giving, which has quite different motivations than the instrumental motivations emphasized in business school giving. Where business school giving and philanthropic giving are comingled, neither message is effectively delivered.

represented by the faculty, and this human capital needs to be supported both administratively and with infrastructure development, including provisions for keeping faculty computing current and supporting emerging education technologies. In addition, the School needs its own facility with classrooms designed for discussion in relatively large classes of 50-80, space for small group meetings and informal conferences, and space allocated to interviewing and career development activities.

Summary

The strategic priorities listed above reflect specific choices about where the School plans to be in the next five years. The foundation objectives all involve quality. Unless the School is careful to maintain its existing quality and to continue to encourage and nurture quality programs, its other objectives cannot be achieved. Specific quality objectives encompass both faculty and students, the perceptions of employers, and the research visibility of the School's faculty.

Three of the objectives presented in Table 1, business partnerships, alumni involvement, and school visibility, hinge on the School's ability to partner with others, whether it is the local business community, alumni, or current and future employers. It is the achievement of these objectives that will make the School a dominant institution in the local community and will be the basis for national recognition.

Finally, several resource objectives are specified. The resource objectives listed reflect the reality that the University of Texas at Dallas is a state-assisted, not state-supported, institution, a reality that requires that the School of Management's strategy address the inherent limitations of formula funding as a basis for academic excellence. The funds provided by the State are a foundation for building excellence, but it will ultimately be up to the School to generate the additional funds needed to achieve and support excellence.

These strategic objectives cannot be achieved on desire alone. Instead, specific strategic actions are needed to achieve the goals these priorities represent. The Strategic Planning Committee and Sub-committees put considerable effort into the development of detailed strategic actions designed to meet these priorities. These are detailed in the next section.

Strategic Actions

The strategic actions developed in the course of the strategic planning process involve five major initiatives. These are:

Process re-engineering: in order to effectively compete, the School needs to give serious attention to all its student service processes, including advising, career services, and placement. The strategic actions detailed below call

for a highly integrated advising and career development approach to student services.

Program development: the School of Management has given considerable attention to new programs in recent years, while failing to improve its major offerings at the master's and undergraduate levels. The strategic actions in this section address the improvement and development needs of these programs, a revitalization of the Ph.D. program, and suggest a programmatic approach to new program development and program maintenance in executive education.

Organization development: the School's management systems and policies are relatively undeveloped and need serious attention. In particular, there is no administrative system for individual performance development, which has implications for faculty review at all levels. In addition, because program objectives and enrollment goals have not existed in the past, staffing plans and overall capability development plans have not existed, something that is addressed in the actions below.

External relations development: the School's mission explicitly calls for partnering with the business community, which includes the School's alumni as well as firms represented on the Advisory Council and major employers in the area. The actions necessary to make this objective a reality are discussed in this section.

Research development: the School has made steady progress in its efforts to create a high quality research environment, something that is necessary to attract high caliber faculty. This section includes strategic actions designed to maintain and improve this research environment.

Process Re-engineering

While it is true that every university produces something intangible called "education," they also produce — in every sense of the word as used to characterize manufacturing — a real output: alumni. Over long periods of time, a school's alumni can be a significant asset, providing connections to companies for future generations of students, serving as advocates for hiring from their alma mater, and donating large sums of money to maintain excellence in the programs offered by their alma mater. Alumni can also be apathetic, which is currently the case at UTD.

The level of connection to the alma mater — and it is a connection that lasts a lifetime — is in part a function of how individuals feel treated as students. Did the school care about them, try to make sure they were on track in their program, and provide assistance in obtaining employment? If so, they probably feel an emotional bond to the school. In the absence of these things, the student may still feel good about the education they received, about the quality of their professors, and the quality of the students that attend the school, but these

perceptions are not an affinity for “the school.” Which is why it is important for the School of Management to provide student services that build a bond between student and School in addition to the personal connection that exists between student and faculty.

If the School is to establish such a bond, it will need to re-engineer student services to make them “student friendly.” Because so many UTD students attend classes in the evening, are full time employed and taking limited schedules, and only come to campus when they have classes, creating “student friendly” services is going to be difficult. Based on this student profile, “student friendly” is defined as:

- provides “care” by developing a degree plan for each student that provides a clear path to graduation and by closely monitoring progress to ensure graduation.
- generates “concern” by providing career services that are tailored to the individual student, whether their career objective is advancement within their current firm or a career placement after graduation.
- develops skills necessary for a successful job search by providing resume reviews, interviewing workshops, and mentoring early in the program.
- creates experience for students without extensive work histories by providing meaningful coop and internship opportunities that both provide educational funding for school and resume enhancement for students seeking career positions after completing their degrees.

The strategic actions that are necessary to create a “student friendly” services program include:

Strategic Action: Re-engineer advising to create an integrated advising–career services–placement function titled “Career Services.”

The transition from an advising to career services orientation is a major shift in focus. Rather than focusing on getting students registered for courses, the expectation is that Career Services will focus on developing students’ career prospects. In doing so, it is expected that Career Services will:

- increase the number of students that complete their degrees by creating degree plans that meet 2, 3, and 4 year goals for program completion;
- offer career development programs such as resume reviews and videotaped interview feedback sessions that enhance placement for students seeking career employment and improve the skills of students that intend to pursue careers with their current employers;

- develop supplemental seminars and training courses that help UTD's students develop the polish that makes them more competitive for fast-track corporate positions that require leadership skills;
- monitor resume development for each UTD student, connecting students with limited work experience with meaningful internships and providing opportunities for students with extensive work experience to demonstrate leadership through university and community involvement; and
- cultivate corporate recruiters and develop a campus recruiting program that ensures corporate recruiters will regard UTD as an "institution of choice."

Gloss is no substitute for educational quality, but a program of career development services can provide the gloss that makes an excellent education shine. The School of Management needs to maintain the educational excellence that has already been created. The purpose of adding significant career services is to ensure the School's graduates achieve their full potential, both in the jobs they achieve coming out of school — and this is just as serious a consideration for full-time employed students as it is for students seeking employment — and in the subsequent positions they achieve as a result of their excellent education at UTD.

The career services objectives defined here cannot be achieved without someone with full responsibility for program development and delivery. Accordingly, it is also deemed strategically necessary to hire someone with full responsibility for this function. This person needs to be able to articulate and develop a systematic program of career development that will serve the full range of UTD students.

Strategic Action: Hire a Director of Career Services with responsibility for making advising-career services-placement a single, integrated set of services.

Since the School of Management will continue to have large numbers of evening students on schedules ranging from full-time study to 1-2 courses a semester, it is important that the Career Services offered by the School embrace these students. In addition, the School's students have a wide range of motivations for pursuing an education, including obtaining their first career position, switching careers, and accelerating their careers with an existing employer. The Career Services program needs to have elements that meet the needs of each of these groups of students.

Strategic Action: Develop a career services program that serves the full range of UTD students, including those that are going to school of obtain career posi-

tions and those looking to advance in their current job.

Although many UTD students are currently employed, a sizable proportion of the student body is looking to make a career change. In addition, if the School of Management is successful in building the Cohort Program, an increasing number of students are going to need meaningful work experiences to enhance their employability upon graduation. Having a job while in School is not necessarily meaningful when it comes to making a switch to a new career or when the student's prior experience is limited to low-level clerical, manufacturing, or service positions. The best option for such students is to incorporate internship positions into their program of study. Furthermore, internships can be a powerful recruiting and screening vehicle for companies that are committed to hiring UTD students. Accordingly, it is part of the School's strategy to integrate an internship/coop program within Career Services.

Strategic Action: Develop a coop/internship program that integrates meaningful work experiences with classroom activities to improve placement options for those with relatively little work experience or unrelated work experience.

Career Services will continue to have responsibility for advising, and if advising is to provide realistic degree planning and integration with career development activities such as an internship or leadership development program, then course scheduling must be established to meet program needs. In addition, areas within the School with program and scheduling responsibilities must make a commitment to course schedules that make it possible for Career Services to develop career development plans for students that may be on 2, 3 or 4 year study schedules. The strategic actions necessary to meet the needs of Career Services need to be consistent with the program development strategies discussed below, and especially with the AACSB accreditation objectives.

Strategic Action: Develop a course scheduling process that ensures degree plans can be constructed with some certainty and that all areas are in compliance with AACSB targets.

Program Development

In the 1994 AACSB Self-Evaluation Report, the School's strategic orientation was described as follows:

“... the School has given highest priority to its doctoral programs.... In response to the business community, the School also emphasizes advanced managerial training through its MBA program and specialized masters programs, and through its executive MBA program. In addition, the School offers undergraduate programs to serve the recently added four-year students and the Dallas community.” (page 2, Extended Mission Statement)

This is a fairly accurate reflection of the emphasis and strategic positioning of the School in the recent past. And as a result, the School's undergraduate and masters programs, which account for the vast majority of classes, student hours, and graduates, have operated with an undifferentiated, general training orientation.

This positioning was found wanting by the Undergraduate and Master's Subcommittees (see Appendices B and C, respectively). In addition, the number of academic positions available for Ph.D. graduates have been limited in recent years, and because placements have suffered, the number of individuals seeking Ph.D. training has also declined. With the exception of the Organizations, Strategy, and International Management Ph.D. Program, enrollments in the School's Ph.D. programs declined precipitously between 1990 and 1996. Enrollments in the OSIM Program rose and stabilized in the 15-18 range during this period, while enrollments in the Management Science track — which includes Marketing, Finance, Economics, Operations Research, and MIS — fell from 72 to 33 students from 1990 to 1996. Total Ph.D. student enrollments have fallen from a high of 82 in 1992 to 51 in 1996, and the number of applicants has likewise fallen off a great deal in recent years (see Appendix E).

In addition to the enrollment problems associated with the Ph.D. program and associated implications for a strategy emphasizing Ph.D. training, the Ph.D. Program Subcommittee Report makes it clear that Ph.D. program formula funding is at best a break-even financial proposition, and taking faculty time into account, the program clearly costs money to support (see Appendix E for details). It is for both these reasons, declining enrollments and financial costs, that the School's Mission takes a more balanced approach to program definition:

- deliver high quality management education to a diverse group of undergraduate and graduate students and practicing executives;
- develop and continuously improve programs advancing management education and practice.

This redirection is not meant to imply that Ph.D. program has become unimportant. There are still excellent strategic reasons for supporting doctoral education, and these are also documented in the Ph.D. Subcommittee report. From a strategic standpoint, the School's Ph.D. program is a cornerstone of quality, enhancing the School's ability to recruit quality research faculty, the research productivity of faculty, and the School's national research visibility. But because the Ph.D. programs cannot produce revenues to cover their costs, the School's stra-

tegic foundation has to be strong master's programs to provide the financing the School needs to operate and strong undergraduate programs that satisfy the demands of external constituencies for large numbers of graduates with specific employment skills.

One of the key program issues raised by the Strategic Planning Committee and the Undergraduate and Masters Programs Subcommittees was the lack of "identity" that characterizes UTD's management programs. All agreed that this is a positioning problem and that the School's programs need to be positioned both in fact and perception. Accordingly, the first step in this process is to develop "value propositions" for each of the School's programs.

Strategic Action: Develop "value propositions" for established undergraduate and master's programs.

A number of potential value propositions were raised by the Strategic Planning Committee, during the SPC–Business Advisory Council retreat, and by the Subcommittees. For the undergraduate program, an emphasis was preparing individuals for positions where there is a clear demand for professional skills, for instance accounting, finance, and MIS. At the master's level, there was much discussion of the possibility of "mass customization," an approach that allows students to customize their education by assembling electives from standardized course menus, an approach that allows students to develop such customized programs as telecommunications marketing, R&D management, and technology consulting. In addition to encouraging the School's students to pursue the cross–functional training that is becoming increasingly valuable in technology companies, this approach encourages groups within the School of Management to define cross–functional sequences that have significant market demand (e.g., production management, operations research, and organizational behavior might create a selection of courses that lead to a concentration in high–technology management).

There are some positioning advantages that clearly make sense given the School's location and current strengths. First, UTD's students tend to have *significant work experience*, with large numbers of individuals coming to UTD with undergraduate and graduate degrees in science and engineering from top rank universities. Second, the School is located in a market that puts a premium on *technology* and technology–oriented studies. Third, existing programs demonstrate that *global business management* and *change management* are issues of great interest and can attract students to attend UTD. The Strategic Planning Steering Committee examined all these themes and agreed that our programs should consider these factors in defining their position within the education market.

Program positioning involves real changes in program offerings and emphasis, but these changes will only have a strategic impact on the School if they are communicated and influence perceptions. Because the School has not had a strong image in the community, but clearly needs to establish an image, it is vital that the program changes are supported by a communications campaign that deals with everything from brochures to advertising. In order

to assure this effort is integrated and someone is accountable for its success, it is strategically vital that the School hire someone to manage all communications.

Strategic Action: Hire individual with primary responsibility for marketing and with a mandate to increase visibility and identity of established programs.

Master's Programs. Real changes are going to be necessary in program offerings to support the program positions suggested above. The School's regular MBA program is and will remain the School's largest graduate program, but it has never had a program champion that has looked after its students, curriculum, and performance in the same way that the M.S., M.A., and executive programs have. Because of this, the Master's Subcommittee's assessment is that the program has been neglected (see Appendix C). Based on this assessment, the Subcommittee recommended that a faculty member take over stewardship of the regular program. This not only establishes someone to provide oversight for the program, but also ensures some accountability for performance, evaluation and ongoing improvement of this vitally important part of the curriculum.

Strategic Action: Appoint Director of Master's Programs with primary responsibility for established MBA program and mandate to develop this program.

The Master's Programs Subcommittee also recommended a reassessment of existing concentrations and elective offerings so that the School's offerings are more focused and also make sense given the constraints of formula funding. This effort will clearly require that each area in the School revisit the area curriculum and courses and define how the area will contribute to the master's programs in the future.

Strategic Action: Evaluate master's options and define a portfolio of programs consistent with School's strategic objectives.

The School launched the Cohort MBA Program in 1996, a strategic initiative that will play a vital role in determining the School's presence in national rankings of full time programs. The Cohort Program has a unique 48-hour, four-semester calendar with lock-step delivery of core courses. There are several features that distinguish the Cohort Program. First, it places a strong emphasis on decision making in a global context. Second, the program aims to develop business and community awareness, corporate contacts for the students and the

School, and to integrate meaningful internship experiences with the normal classroom training. The Cohort Program also includes a proseminar sequence that brings outside speakers and prominent business leaders in to interact with the students. Finally, the program has a strong emphasis on information technologies and relies heavily on network-based information tools for research and application development.

The Cohort MBA Program was started as a strategic initiative, and the Strategic Planning Committee and Master's Subcommittee strongly endorse this effort. It is imperative that this program continue to receive support and develop into a highly visible program serving the very best students in the world.

Undergraduate Programs. The MBA degree has become the defining credential for individuals interested in management careers, but there are still large numbers of individuals that are pursuing undergraduate degrees in business, and most will not continue on for a master's degree. The great majority of students working on undergraduate business degrees are doing so with the intention of acquiring skills that will make them eligible for professional positions in staff functions. Individuals that terminate their higher education with an undergraduate degree are unlikely to become managers, but they can still have rewarding careers as individual contributors. Put simply, undergraduate education in business tends to be about getting a job. And undergraduate programs tend to be supported by employers that need large numbers of individuals to do relatively routine work that requires a great deal of discretion and an ability to work independently, the kind of jobs that exist in large numbers in accounting, certain types of MIS work, and in financial control positions within the operations of companies (financial analysts and cost accountants).

The School of Management can develop positive relationships with employers and a large base of satisfied alumni if it focuses its undergraduate training in areas where there are many job opportunities. This is the recommendation of the Undergraduate Programs Subcommittee, and this was in turn endorsed by the Strategic Planning Committee.

Strategic Action: Develop "job opportunity majors" in undergraduate program consistent with School's strategic objectives.

Providing appropriate training is an important part of placing undergraduate students, but experience and career preparation are also important. Career Services is expected to contribute a great deal to the level of preparation of the School's undergraduate for entering the job market. In addition, an extensive program of internships and coops are going to be necessary to give individuals the practical job experience necessary to land individual contributor positions with major firms. This has the added benefit of encouraging an educational partnership between the firms offering the internships and coops and the School of Management, a partnership that is an important feedback mechanism for assessing the School's programs and for

developing additional programs such as short courses and credential programs that provide important post-graduation skills training.

Strategic Action: Provide an integrated work experience in the undergraduate program through coops for students that do not have meaningful work experience.

The School of Management can also improve the job prospects of its undergraduates and create an ongoing dialog with professional groups by actively supporting and promoting professional networks and organizations on campus. Professional groups typically provide ongoing training that can potentially be a valuable supplement to the School's professional programs, and they certainly provide the contacts necessary for students to network into jobs. In addition, many professional groups support certification programs for their members. Students that get involved with these groups early in their education are in a position to achieve an accelerated certification once they have graduated. In addition, by providing a home for these groups, the School is in a position to become a privileged supplier of professional continuing education programs, a win for the group and a win for the School of Management's Executive Programs.

Strategic Action: Develop a portfolio of professional groups housed at UTD that serve our students with professional contacts, applied training, and accelerated professional certifications.

Because UTD's freshman admission standards are so rigorous and the local community colleges have well developed honors programs, there are a significant number of students in the undergraduate program that have the potential to continue on as graduate students. The School's current fast-track program makes it attractive for students that begin their undergraduate studies at UTD to continue on for an MBA. In addition, the Undergraduate Program Committee recommends the School establish an undergraduate honors curriculum that provides a greater depth of training supplemented by enrichment for undergraduates whose grade point average and activities indicate a high potential for success in graduate school.

Strategic Action: Develop an honors curriculum that supplements the existing fast-track program and exposes promising students to advanced study.

Because the MBA program does not require an undergraduate degree in business, students that complete their undergraduate work in other UTD schools are eligible for graduate study in Management. The School would like to attract the best of these students into its master's and Ph.D. programs. In order to encourage undergraduate students in other schools to sample the business curriculum, the Undergraduate Programs Subcommittee recommends the School develop a non-major sequence in business that both provides fast-track options and provides a coherent elective sequence that introduces students to basic issues associated with capitalism and democracy, economics, the employment relationship, and international business.

Strategic Action: Develop a non-major sequence in business that serves as a conduit for channeling the best students in other schools into School of Management graduate programs.

Executive Education. The School's Executive Education program activities began in 1992 with the Executive MBA Program. Many of the students in the first class of 25 were sponsored by Advisory Council member companies. Dependence on Advisory Council members has lessened as the program has attracted applicants from a wide range of corporations. With class enrollments growing to 35 and diversification in the companies participating, the program now serves an "established base" of companies sending students on a regular basis that represents the entire DFW business community. While the market acceptance of the last several years has validated the basic premise of the program — an innovative program that focuses on management education for a changing, internationalizing world and stresses value and personal service — there is considerable untapped potential. An increase in class size to 50 would benefit the School with respect to both visibility and finances. Given the present economy in the area and the attractiveness of the program, this appears possible in the future.

The School's executive offerings expanded with the launch of the Organization Development and Change Management Executive M.S. Program (ODCM) in 1994 and the Masters in International Management Executive M.A. Program (MIMS) in 1995. The ODCM Program was launched in partnership with the Semiconductor Training and Organization Effectiveness (SCT&OE) Group of Texas Instruments and was designed to meet the needs of internal corporate consultants that have extensive travel commitments. Besides T.I., the ODCM Program has had students from Raytheon, EDS, Nortel, Xerox, Northrop-Grumman, Cigna Insurance, Banc One, and UTD. The MIMS Program is based on a novel approach to distance education that decomposes the curriculum into asynchronous-synchronous and face-to-face and non-personal communication elements so that it can be delivered with a combination of internet, groupware, and retreat formats for individuals whose travel schedules and locations makes it impossible for them to participate in traditional educational delivery. The MIMS Program serves a worldwide audience that appears to be rapidly growing.

The ODCM and MIMS programs both have the potential to expand enrollments. Like the Executive MBA Program, substantial percentage increases are possible as the programs mature and as the School develops market recognition for these programs. The potential returns associated with greater promotion, development, and resources are substantial for all existing executive programs.

The successes in executive education have largely come from offering special formats, but there is a sense that the course offerings need to be updated and revised so that they are more consistent with the needs of individuals that are truly working in an executive capacity. Based on this assessment, the Executive Education Programs Subcommittee recommends comprehensive program reviews as a first strategic step toward re-positioning the programs, especially the Executive MBA Program.

Strategic Action: Complete a comprehensive review of existing programs, revise and update curricula based on these reviews.

The ODCM and MIMS Programs both require core courses above and beyond the courses that define the programs. The core requirements for the M.S. and M.A. differ, and the core for the School's regular programs is not necessarily the most appropriate set of courses for meeting the needs of the executive programs. But the most urgent problem for these programs is a lack of scale economies in the core delivery, a problem that both inflates the cost of the core curriculum to the sponsoring companies and dilutes the core's contribution to the School's budget. Accordingly, the Executive Education Programs Subcommittee recommends that a separate core be established for the specialized executive programs.

Strategic Action: Develop proposals for an integrated core curriculum that better fits the needs of the specialized executive programs while maintaining the quality of program offerings.

The success of the ODCM and MIMS Programs with relatively small numbers of students indicates that there is significant potential for expanding Executive Education by offering specialized programs serving the needs of defined professional groups and by providing distance education to individuals that cannot attend traditional programs. But while there is significant opportunity to develop such programs, there is no clear process for reviewing and investing in such programs. The Executive Education Programs Subcommittee recommends such policies be established and that an investment fund be created to support new programs during their start-up so that they can be supported by reasonable levels of advertising, capital investments, and administrative assistance. Besides providing a vehicle for starting programs, such procedures are also a mechanism for providing oversight and accountability

for funds spent to ensure investments are based on realistic projections and that programs achieve their stated enrollment and financial goals.

Strategic Action: Establish procedures and policies for creating new specialized executive programs.

The School's Executive Education efforts have not yet expanded to include non-degree offerings, but this is clearly an area where there is tremendous potential just in the DFW market. In addition, major local companies are actively looking to subcontract out major training components, but want to partner with institutions that have a capability of working as a "systems integrator" for the entire training function. Success in this integrator position not only requires expertise in delivering training, but also in managing multi-party partnerships consisting of private companies, individual contractors, and other higher education institutions (e.g., Collin County Community College's Continuing Education Programs). This demands that Executive Education be prepared to do much more than offer courses, which is why the Executive Education Subcommittee suggests a strategy development effort.

Strategic Action: Define partnership strategy for developing non-degree executive offerings.

The success of the various executive programs to date has been a mix of Advisory Board goodwill, key sponsorships, haphazard advertising, and various promotions. The future success of the established programs and of any new offerings will be greatly aided by an integrated marketing plan that positions the various programs, creates public awareness, and generates potential applicants. This marketing program needs to include not only advertising, but also direct mail, networking through established alumni, and working with professional groups as part of a general promotional strategy. This marketing strategy needs to be integrated and consider start dates and the varying recruiting calendars managed by the Executive Programs Office.

Strategic Action: Develop a marketing strategy for executive programs that includes advertising, promotions, and direct mail.

The School has had some success using conferences to attract attention to its executive programs and to get business firms engaged in joint activities. The Executive Programs Subcommittee suggests the School develop a formal plan for holding regular conferences that promote Executive Education at UTD.

Strategic Action: Develop conferences agenda to attract more businesses to UTD, promote executive programs.

It appears there is great potential for the delivery of business education using emerging telecommunications technologies, but it also appears that there is more confusion about how to do this and what it can be than there is vision. The MIMS experience has provided the School with valuable experience that can be used to define a clear distance learning strategy that is based on “appropriate technology,” an approach that emphasizes the kind of simple solutions with affordable technologies that can bring distance programs to markets like Latin America, Asia, and Africa. Such an approach is also consistent with UTD’s strengths in international business education. The Executive Programs Subcommittee recommends the development of a distance delivery standard based on appropriate technology and rapid development of international programs that take advantage of UTD’s leadership in content and experience in internet program structures.

Strategic Action: Develop strategy for distance program delivery that is consistent with strategic objectives and strengths of School.

Any expansion of executive offerings is going to run into limitations in the availability of faculty to teach courses and supervise programs. The only way executive education can work around these constraints is to develop a cadre of lecturers and senior lecturers that are capable and qualified to deliver non-credit programs and continuing education. Executive Education degree programs certainly must continue to be staffed by academically qualified faculty, but much of what will be offered through continuing education will not require academic qualifications and can be more cheaply delivered with professionally qualified staff.

Strategic Action: Develop strategy for managing faculty resources necessary to offer executive programs that exceed capabilities of full time faculty.

As the number of students enrolled in executive education programs has grown, the capabilities of the Executive Education Office have been stretched to the limit. Furthermore, the Associate Dean for Executive Education continues to have program responsibilities for the Executive MBA Program in addition to responsibilities for all administration of Executive Programs. The consequence is that recruiting students for the Executive MBA class and

making travel arrangements for the trip abroad has to be juggled with program development, marketing strategy development, and program review. Administratively, the Executive MBA Program needs a champion and the Executive Programs Office needs an Associate Dean, and both jobs will suffer to some degree as long as a single person has both responsibilities. And program expansion is going to necessitate a staff expansion at some point, so it is important that a staffing plan is formulated that encompasses all existing programs (EMBA, ODCM, and MIMS) and defines responsibilities that will emerge in the face of growth.

Strategic Action: Define plan for strengthening staff and administrative capabilities in Executive Education Office.

As the executive programs have matured, companies and managers have emerged that are clearly targeting individual programs and the programs have generated alumni that are in a position to send future students through the program. One mechanism for getting these individuals more tightly tied to individual programs is to put them on program advisory boards that meet periodically to review the program, provide advice to the program director and Associate Dean, and take some ownership for the program's ongoing success.

Strategic Action: Create executive program advisory boards involving sponsors and alumni.

Finally, the facilities that the School is currently using for executive education are starting to get shabby and there are ongoing problems with janitorial and food services that are supposed to support the programs. Efforts need to be initiated to remodel, repair, and upgrade existing facilities and to improve support services.

Strategic Action: Improve facilities and services.

Ph.D. Programs. The School of Management's Ph.D. programs are not just a source of pride, they are also the reason that many of the School's tenured scholars chose UTD over more prominent institutions without Ph.D. programs. Maintaining this recruiting edge and ensuring the School continues to have the prominence associated with a successful Ph.D. program is going to require effort to boost enrollments and graduation rates.

As the number of potential Ph.D. students has declined, competition for the best candidates has increased. Because Ph.D. students typically cannot afford to pay for 4-5 years of educa-

tion and are well beyond the age when they are supported by their parents, a Ph.D. program can only remain viable to the degree that it is able to provide assistantships for its students, and the pay rate for these assistantships determines whether a student can survive while in the program or be financially strangled. UTD has historically provided an average level assistantship, but because the School does not provide tuition waivers, a significant proportion of the assistantship has been consumed by tuition and fees. And this has been exacerbated in recent years by the rapid increase in the number and level of fees. The only way the School can continue to compete with the top universities in the country for potential students is to provide adequate support for students to live on while in the program.

Strategic Action: Develop mechanisms for improving TA funding to make recruiting more competitive.

All the Ph.D. programs need to increase their visibility and marketing efforts. Many individuals that might be qualified for a Ph.D. do not know what it takes to get the degree, that financial support is part of the program, and what is involved in an academic career, so to some degree simple informational recruiting can help a great deal in getting students to consider applying for the program.

Strategic Action: Develop recruiting plan for Ph.D. programs that expands the pool of students that know about programs and Ph.D. career option.

Because the School's Ph.D. programs are costly but generate indirect benefits, there is a need to better document these benefits with indicators other than placements. These indicators need to capture both productivity by Ph.D. students while they are at UTD and their career success. Because the majority of the School's students take academic positions, it is relatively easy to monitor their subsequent career success using standard references and internet searches.

Strategic Action: Establish assessment criteria, including placements, promotion rates, publication rates, and visibility generated for UTD.

New Program Development and Program Evaluation. The School of Management has many opportunities and will have many more in the future. And this is a problem. While as prob-

lems go it is not as bad as having no options, it is this plethora of opportunities that is responsible for the current lack of focus in the School's offerings.

What this suggests is that there are really two program development problems, (1) a lack of process for making choices among opportunities and (2) a lack of process for evaluating current efforts and eliminating those that do not support the School's strategy. Both processes are important for ensuring the School's actions are congruent with its strategy, and also for managing the School's limited resources. An Ernst and Young Foundation study of strategic planning in business schools points to the basic resource dilemma:

“We have yet to encounter a business school that is overwhelmed with its resources and is desperately trying to find redeeming ways to spend its extra money. The appropriate response to the limited resources that everyone faces is focus. Without focus there will never be enough resources to succeed. And the challenge for most business schools today is to identify and make the choices that focus requires — to do fewer things better. [The schools we studied] found that identifying and making these choices were their most difficult tasks.” (page 9, *The Challenge of Change in Business Education*).

At this point in time, the most severe resource constraint confronting the School is tenure-track faculty time. There is a severe shortage of faculty able and willing to teach in the School's executive programs, not enough faculty to manage and champion programs, and inadequate faculty time to properly evaluate and revise course and curricula structures. Current hiring and staffing plans will help alleviate this constraint to some degree, but not completely. Which is why defining processes for creating new programs and for reviewing and eliminating unnecessary offerings are sorely needed.

While it is tempting to use lecturers and senior lecturers to bridge short term staffing shortages, this is not a realistic solution when the staffing problem is a new program. Because the AACSB evaluates programs individually for academic qualifications and full time status of the faculty, starting up a program with part-timers is dangerous, and it is extremely difficult to also find any lecturers, part or full time, that are academically qualified. As a result, decisions about new programs need to look seriously at the availability of academically qualified, full time staff that can teach courses and support the program.

Besides availability, an assessment also needs to be made of opportunity costs. The School's executive programs, in particular, are coming to the point where they are going to start cannibalizing faculty from one another because there are too few faculty resources to meet the demand for teaching. Existing programs already use significant numbers of faculty outside the School of Management and from other universities, and this is before any new programs are established and without any non-credit offerings.

There is no easy answer to this problem, but it is an issue with strategic implications. In addition, whatever process is developed for new program review must be integrated with the strategic staffing process that defines hiring priorities for the School, so program choices have implications for future, as well as current, position allocations within the School.

No recommendations were developed in the strategic planning process, so the definition of an appropriate process for program selection needs to be defined. There is some urgency in this because of the appeal of distance learning, but it is unclear that the School's faculty is ready technically or motivationally to take on additional duties. It may be possible to provide incentives for individuals that will drive interest in new programs, but this interest is likely to be at the expense of established programs that may provide more long term benefits to the School.

Strategic Action: Develop process and standards for establishing new program offerings.

Program evaluation and improvement processes were assessed for each school at UTD in the course of the Southern Association of Colleges and Schools (SACS) reaccreditation process, including the School of Management. As is typical at UTD, evaluation and program evolution tend to be ad hoc and vary a great deal by program, but it is also true that a great deal of program evaluation takes place and that these reviews are the basis for continuous improvement efforts (see Appendix H).

Although there is extensive evaluation that is used to improve programs, there are no processes in place for making choices among programs. Which means there is a tendency to let what exists remain in place, regardless of whether it is financially viable or is serving anyone. The Master's Programs Subcommittee suggested cutting several M.S. concentrations, but they did not define a process for making these decisions. If there is a defined process, with criteria defined in advance, then eliminating programs is less likely to get caught up in emotionalism and conflict. In addition, defined criteria for curriculum revision also create standards for new and established programs that clearly guide program director's development efforts.

Strategic Action: Develop a program evaluation process.

Organization Development

One of the weaknesses in the School of Management surfaced during the 1994 AACSB review process was a lack of systematic feedback and review processes that supported continuous improvement. The *AACSB Candidacy Manual* is very explicit about the importance of these processes:

“The accreditation standards adopted by the member of the American Assembly of Collegiate Schools of Business (AACSB) in April, 1991 embody two dominant concepts: Schools must possess (1) a rigorously developed and operational mission, and (2) processes that are consistent with and help to *advance the school's mission and produce continuous improvement.*” (emphasis added; page 36, *AACSB Candidacy Manual*).

The five major processes the AACSB identifies as necessary to a discipline of continuous improvement are:

- Curricula planning and evaluation
- Course and instructional resource development
- Faculty development
- Intellectual contributions
- Student recruitment and selection

Included in these listed processes are systematic program review and curriculum planning, which are discussed in the previous section, and student recruiting, which is systematized. Where the School does not have well developed processes is in faculty development — including teaching evaluation and development — in staffing planning, and in research support and development, something that is taken up in a later section.

The School of Management is a faculty, and it is the faculty's skills and ongoing development that are at the core of the education process. Maintaining and building this human capital must be a core process if the School is to retain its research emphasis and remain at the forefront of management knowledge, a key part of the School's vision for the future. In addition, the faculty's course delivery is the primary service of the university, so this service needs to be continually developed and renewed.

The School of Management has operated in the past with a performance assessment system for faculty. The basic principle of this system is a retrospective review process that evaluates faculty work after it is completed. The fundamental weakness of this approach is that it asks faculty to judge in advance what activities are priorities, then second guesses this judgment at a point when it is too late to reallocate effort and rearrange priorities. An alternative approach is what is called a performance development system. The performance development approach begins with a goal-setting process that requires the Dean and individual faculty set goals for research, teaching, and service in advance, come to an understanding of priorities and desired outcomes, and then the faculty member's yearly performance is evaluated based on the attainment of these goals. This approach does not eliminate appraisal and evaluation; it merely ensures that individuals are informed about how they will be appraised.

The performance development system is an extension of the UTD faculty review procedures and is intended as a supplement to these procedures. The annual review process ensures that assistant professors are working on well defined plans for attaining tenure, that associate professors are continuing with their research programs as they progress to eligibility for

promotion to full professor, and that full professors remain active in compliance with the newly established post-tenure review policies. The Dean has responsibility for faculty development in conjunction with the annual review process, but this process does not preclude active tenured faculty involvement in the development of untenured faculty, nor does it change the role of tenured faculty in the UTD promotion and tenure review procedures.

Strategic Action: Create performance development system for faculty that reflects the School's mission.

The effectiveness of the performance development system depends on how well articulated the measures are for core job activities. Since research output can be counted and service activities defined, these are not particularly problematic. Teaching, on the other hand, is relatively difficult to measure because it is an entire cluster of activities that overlap with service and that differs a great deal across faculty depending on rank and group. So, for instance, teaching activity for one faculty member might include course delivery, advising, and student club sponsorship, while another faculty member's efforts might focus on courses, dissertation supervision, and running a research seminar. Both faculty members are contributing positively to the School's teaching function, they are just contributing in different ways.

UTD adopted a campus teaching evaluation policy in 1996 that requires every school develop specific measures and policies for assessing teaching. This policy is designed to ensure individual faculty have performance feedback on their teaching contribution beyond the "smile sheets" collected in the course evaluation process. In addition, the policy requires schools develop standards for teaching that can be used in the promotion and review process to document teaching performance. Implementation of this policy is a strategic priority for the School of Management.

Strategic Action: Develop a teaching evaluation process consistent with the UTD teaching evaluation policy.

Because the School is growing, it has a healthy proportion of junior faculty and senior lecturers. Both groups need special support for their professional development. Assistant professors, for instance, need to be buffered from administrative demands and to have release time in the summers to concentrate on their research, while senior lecturers need to be encouraged to remain research active while fulfilling their primary responsibility of teaching. Much of this support for both groups needs to come through senior area faculty, area research seminars, and mentoring. Formal programs are needed to support these programs, and such activities need to be part of the performance development for senior faculty.

Strategic Action: Develop programs for performance development with support specifically for untenured faculty and senior lecturers.

The AACSB explicitly expects staffing development to be linked to the School's program development activities and mission implementation. In order to accomplish this, the School needs to have a process in place that links enrollment projections and program development plans to staffing planning.

Strategic Action: Develop staffing plan based on program developments, projected needs.

Achieving AACSB accreditation is an important objective for the School. While not guaranteeing success for the School, accreditation removes a barrier to program recognition that has been a problem for the School. The School plans to enter pre-candidacy in 1997, but it is important that an agenda for moving to accreditation is developed by a group that will oversee the accreditation process.

Strategic Action: Develop agenda for moving to accreditation.

External relations Development

Developing enduring partnerships with the business community is one of the central strategic directions for the School, and it is emphasized in the School's Mission. Partnering is a relationship, and success in partnering requires the School create administrative mechanisms, faculty involvement processes, and educational and coop programs that ensure the relationship is cultivated and that value is generated in the relationship for the firms and corporations that become important partners.

Strategic Action: Establish key corporate partnerships and create mechanisms to maintain and strengthen these over time.

Corporate strategic alliances are the most enduring and intimate form of interorganizational partnerships, and such alliances are an important aspect of the School's external relations strategy. Alliances can potentially support a wide range of development objectives, ranging from support of faculty research, investments in delivery technologies, and endowment funding. In addition, alliances can be enduring, which means they can be leveraged in the future as a basis for additional alliances and as a vehicle for defining additional arenas of cooperation. But alliances are also about substance, which means the School must take an active role in defining the basis for alliance formation by working with companies to develop education and research programs that meet the unique needs of the alliance partner.

Strategic Action: Develop vehicles for defining corporate strategic alliances.

The School's partnering and alliance strategies need to be supported by an image campaign that defines the School's unique contributions to the business community and highlights the potential of the School as a partner institution. Initially, this image campaign may focus on successes that School has already had working with companies, while at some later point attention may be diverted to focus on prospective partnerships and program alliances that advance the School's progress toward achieving its vision.

Strategic Action: Develop SOM identity, work with public relations to construct corporate image.

Because UTD is a state-assisted, and not state-supported, institution, excellence in the School of Management has to be achieved with supplemental funding. Past fund raising has not produced a strong funding basis for the School, and existing endowments are minuscule relative to the needs the School has to support faculty research, provide funding for Ph.D. students, and maintain computing technologies. Because external funding can take many forms, one of the first strategic actions necessary to achieve this plan is the development and implementation of a fund raising strategy.

Strategic Action: Develop fund raising strategy.

The School potentially can have a strong, and immediate, relationship with some proportion of its alumni, but this requires a vehicle for institutionalizing this relationship. The most direct route for creating an ongoing dialog between the School and its alumni is an alumni association. Although the School has a large number of alumni, identifying and locating these individuals is going to be an enormous task. Then comes the problem of persuading

them to give to the School, something that can only be accomplished with the creation of defined giving opportunities.

Strategic Action: Establish alumni association, alumni giving opportunities.

Long term financial stability for the School can best be secured with endowment funds that guarantee fundamental resources like research support and student scholarships will not vary with the prior year's fundraising campaign. Endowment creation is a long term project, but it is a project that provides increasing payoffs over time and allows external efforts to focus on needs other than fundraising. So the sooner the effort begins, the more likely the returns will be experienced by those responsible for creating the endowment.

Strategic Action: Create endowment strategy.

One source of funding for both endowment and discretionary support is foundation grants. The School has not actively pursued these in the past, but should because foundations are more often in a position to grant large sums of money to support major initiatives such as a building, research endowments, and student scholarship programs. But obtaining these grants requires a long term cultivation of the funding sources and extensive relationship building, often through a series of smaller grants that establish a positive history of public relations and demonstrations that the School can meet the foundation's performance expectations. Accordingly, any efforts in this area need to operate from an agenda that targets key foundations and cultivates them over time.

Strategic Action: Establish a foundation grant agenda for the School of Management.

Research Development

The foundation for the School's success to date is the research productivity of its faculty. Considering that the School is just over 20 years old and many of the faculty have been with the School a much shorter time than this over a period when the School was consistently understaffed, this record is all the more remarkable. But there is definitely room for improvement in the School's research support and in the general research climate within the School.

In particular, the School needs to work to cultivate a more active culture of academic dialog between faculty and with the broader scholarly community. Such a dialog not only enriches the School's scholarship, but also supports the School's visibility in the external community and provides networking opportunities for Ph.D. students. One mechanism for accomplishing this is to set up and support a distinguished visiting scholars program, but there are surely other opportunities to achieve similar outcomes (e.g., sponsoring small conferences, creating "book" conferences, and sponsoring focused symposia). This was discussed at length by the Steering Committee, which agreed that each area in the School needs to develop a program for fulfilling this strategy.

Strategic Action: Establish strategy for raising the level of research dialog within the School of Management.

The School of Management has three research centers, and it was not clear to the Steering Committee what their relationship was with the School strategy. In the interest of better defining the relationship between the activities of these centers and the School strategy, the Steering Committee recommended a review of these centers and assessment of their current and potential contributions to the School's success.

Strategic Action: Assess SOM research centers, contribution to research conducted within School.

Finally, the one weakness in the School's approach to research support is its support of junior faculty research beyond the initial appointment summer support. The School does not have a regular program of research support available, and as a result the majority of the School's junior faculty do way more summer teaching than is good for them. And ultimately this is bad for the School and the School's research environment. In addition, a program of research funding should also provide seed money for faculty research that has potential for receiving significant external support. Seed grants are used to support pilot studies, archival data acquisition, and theory development that can be a basis for demonstrating to funding agencies that a line of research has a high potential for generating results. So, there are important strategic reasons for the School to provide research funding to faculty at all levels.

Strategic Action: Create a program of research funding that supports untenured faculty development and provides seed money for major research projects initiated by tenured faculty.

Summary

The strategies in the previous section are intended to meet the strategic objectives identified in the course of the strategic planning process. There is no simple one-to-one correspondence between the School's strategic objectives and the strategies intended to achieve them, because the various strategic actions discussed in this document meet multiple strategic objectives. For instance, the School's partnerships are expected to provide placement opportunities for the School's graduates, to be a source of coop/internship positions, to support faculty research, and to provide funding to the School for various development efforts.

Nevertheless, it is worth revisiting the School's broad strategic objectives to define immediate strategic priorities. It was argued in the strategic objectives discussion that the School's strategic success must be built on faculty and program quality. The specific strategic actions that address this objective include:

- the creation of a Career Services function that provides integrated advising, career and professional development, and placement to all UTD students.
- positioning the School's programs to emphasize comparative strengths in technology, international business and change management.
- developing unique, cross-functional concentration opportunities in the master's curriculum.
- developing undergraduate programs that provide professional independent contributors to major employers such as accounting and MIS consulting firms.
- cultivate a strong network of professional groups on campus.
- provide opportunities for non-business undergraduates with honors credentials to fast-track into the School's master's programs.
- develop mechanisms for providing more external input into executive program curricula.
- strengthen Ph.D. student support levels.
- create and install a rigorous program review process that documents program performance.
- use a performance development review process to focus faculty efforts on quality outcomes.
- develop and implement a comprehensive teaching evaluation process that captures dimensions of teaching contributions beyond student course evaluations.
- create an agenda for achieving accreditation.
- develop key business partnerships and establish corporate strategic alliances.

- cultivate the School's alumni and establish a relationship that supports the full range of School efforts.
- establish a research grants program that supports junior faculty and provides seed money to senior faculty.

The School's mission specifically advocates development through business partnerships, and these are an explicit component of the strategy. In addition, it is expected that these partnerships will have significant spillover benefits in meeting all the other strategic priorities established in the course of the strategic planning process. In addition to the specific strategies directed at the cultivation of business partnerships, the following strategic actions are expected to solidify the School's relationship with the business community by providing services on which key firms will come to rely:

- creation and expansion of the Career Services function within the School.
- development of a coop/internship program that provides professional experiences for students and an opportunity for firms to screen potential employees using the low commitment associated with work–study programs.
- company participation in program development activities and curricula reviews.
- involvement with campus–based professional groups and School sponsored professional development and continuing education programs.
- participation in campus conferences and focused research symposia.
- sponsorship of faculty research grants and participation in faculty research programs.

The School's alumni are its most extensive and persuasive marketing channel, which is why developing a network of loyal and committed alumni is a specific strategic objective. In addition to specific efforts to form and nurture a School of Management alumni group, the following strategic initiatives are expected to contribute to the development of alumni support:

- developing the School's Career Services capability should help build alumni loyalty by strengthening the student experience.
- individuals that get significant career experience through a coop/internship while they are in school are expected to be more dedicated alumni after graduation.
- strengthening the relationship between the structure of the School's programs and specific job opportunities should also establish good will with students that will turn into alumni support after graduation.
- executive alumni are generally more likely to have both the resources and inclination due to the cohort experience to support the School with time and money, which means individuals with considerable organizing skills can be expected to become involved in the alumni association — given the opportunity — coming out of executive programs.

- involvement in program review processes will create buy-in on the part of the alumni involved in the process, which will increase their overall involvement with the School.
- accreditation can be a focal point for mobilizing alumni support for the School, because the alumni have a shared interest with the School in seeing this important validation behind us.
- key strategic alliances are a basis for establishing programs that can entice distant alumni back into involvement with the School.

Every strategic action presented here has some potential to increase School visibility. But certain actions are expected to greatly enhance the School's perceived visibility, regardless of how much press they receive. These actions are:

- the formation of strategic alliances with major corporations will provide evidence to the broader community that the School of Management is a force in the business community.
- the creation of a systematic public relations campaign should generate awareness in the local community that UTD's School of Management has unique attributes.
- establishing key partnerships in executive education and through professional development and continuing education programs can provide significant visibility for the School within professional networks, and this visibility has the potential to spread worldwide through professional association internet conversations and list-serv postings.
- sponsoring conferences and specialized research symposia is expected to solidify the School's intellectual leadership in the business community.
- continued success with Ph.D. placements will generate ongoing visibility in the academic community.
- bringing distinguished scholars to UTD raises the School's research profile by putting key opinion makers inside the institution and exposing them to a positive intellectual experience.

Resource expansion is all about paying for excellence. Specific external relations strategies were presented that address this objective, as well as alumni development strategies. The program revisions anticipated as the result of this strategic review are also expected to increase School enrollments, especially graduate enrollments, which will have a positive impact on the School's finances.

In reviewing the strategic actions in conjunction with the strategic objectives, it is apparent that certain actions have much greater potential benefits than others. For instance, establishing a Career Services function is expected to enhance the perceived quality of the School, to build alumni loyalty, and to provide a basis of greater engagement with the School's key business partners. Similarly, the establishment and cultivation of business partnerships and creation of business strategic alliances has enormous spillover benefits for all aspects of the School's strategy. And there can be no doubt that AACSB accreditation matters in multiple

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ways. This is not to suggest that these are the only strategic actions that matter, because they are not. But getting results in these three areas will greatly boost the impact of all the other initiatives defined by this plan.

Implementation Plan

Too many strategic plans end up as vaporware: promises without substance. For a plan to attain the reality of action that makes it a strategy, it must be implemented. And implementation is no easy task. As difficult as it is to create and capture a unified vision of a desired future, it is even more work to turn this vision into the systems, values, and operating procedures that make the strategy a reality.

The implementation plan described here is a learning process. It assumes problems will be uncovered, opportunities identified, constraints will change and new solutions will be discovered and that all these unknowns will impact priorities and alter schedules. In addition, this process anticipates imperfections in the plan and assumes it will be modified and changed in the course of implementation.

Implementation Process

The implementation process utilizes the committee structure currently in place in the School, the same committees that formulated the strategic plan. In addition, the Strategic Planning Steering Committee will guide the implementation process by monitoring schedules, evaluating results, facilitating joint committee activities, and acting as a liaison with the School of Management Advisory Council.

The Steering Committee is chaired by Dean Hasan Pirkul, includes the chairs of the Undergraduate Program, Masters Programs, Ph.D. Program, Executive Education Programs, and External Relations Committees, has representation from the School of Management Advisory Council, and includes other selected members that the Dean feels can make a positive contribution to the Committee's work. The Steering Committee's specific implementation responsibilities include:

- monitoring the implementation plan to make sure committees are on schedule and meeting their implementation goals;
- evaluating the School's progress toward meeting the objectives specified in the strategic plan;
- ensuring implementation projects that are in the domain of multiple committees are "owned" by some subcommittee, appointing ad hoc task forces to complete special projects that are not within the domain of an individual committee, and generally making sure that some group or task force is engaged with each implementation responsibility;
- discussing modifications to the strategic plan that may become necessary due to problems, constraints, or opportunities discovered in the course of implementation;

- releasing schedule updates and priority changes that are identified as necessary as the plan is implemented.
- defining the annual process for updating and reviewing the strategic plan.

Since all the principal committee chairs are represented on the Steering Committee, most of the Steering Committee's responsibilities can be exercised with monthly briefing meetings. All of the milestone dates in this report are tentative, but once these are finalized by the responsible committees, the Steering Committee will create a scheduling system for monitoring implementation progress.

Primary responsibility for ensuring this strategic plan is implemented rests with the program committees. Their charges include program supervision and improvement, but strategy implementation will require a more active program role in some cases. In particular, the program committees will probably have to appoint task forces and delegate some issues to area faculty. Where this is the case, overseeing tasks and ensuring implementation is on schedule is the responsibility of the program committee.

Plan Adoption

The first phase of implementation is review of the strategic plan by the faculty. This review and adoption will proceed as follows (see Table 1 for target dates):

1. Strategic Planning Steering Committee Review of the strategic plan and implementation plan. Forward a full copy of the plan for review by the Academic Policy and Planning Committee and the Strategic Planning Subcommittees.
2. Steering Committee revisions in response to subcommittees and APPC comments.
3. Submission to School of Management faculty for review.
4. Steering Committee finalizes implementation schedules for subcommittees and monitors implementation process.

Table 2. Strategic Plan Adoption Schedule

Dates	Action
March 18	Plan reviewed by Steering Committee
March 24	Plan forwarded to Strategic Planning Subcommittees and Academic Policy and Planning Committee
week of March 31	Academic Planning and Policy Committee meeting

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April 8	Steering Committee review of APP comments, Subcommittee comments and revisions
April 11	Plan revisions distributed to School of Management faculty
week of April 21	School of Management faculty meeting

Once the plan has been reviewed by the faculty, full implementation will proceed. Because the strategic planning process has involved extensive participation by School faculty and key stakeholders (see Appendix A), it is reasonable to expect that the general recommendations of the strategic plan will remain intact through the approval process. Because the implementation agenda is extensive (see below), the implementation schedules for the program committees include simultaneous processing as the plan is moving through final review.

Evaluation of Implementation

There is an adage in business that is fundamental to this implementation plan: what gets measured is what gets done. Because the School of Management encompasses a wide range of activities, there is a great deal to measure. When integrated into an information system, it is expected that the measures collected and the analyses they make possible will be a powerful tool for assessing the School's performance and identifying adjustments that will improve performance.

In the course of the strategic planning process, five general categories of measures were defined that capture how well the School is fulfilling its mission and advancing its strategy. These objectives and metrics are the beginning of a performance assessment system that can be used for continuous improvement (see Table 3). The measures encompass quality, business partnerships, alumni involvement, school visibility, and resources and are captured by 170 specific metrics. The metrics suggested here are unlikely to all be implemented because of various data problems, but the intention remains to capture every facet of the School's operations with some kind of quantitative measure, even if the quantification has the imprecision of a perceptual measure.

Measuring alone cannot set standards, and it is clear that standards will have to emerge as the measurement system is established and baseline values for the various metrics are established. In addition, there are aspects of the School's operations that are already functioning at a very high level (e.g., GMAT scores for the Cohort MBA) so it is not realistic to expect that the School will improve on every metric listed in Table 3. In a number of cases, the School's performance already exceeds reasonable standards, and in these cases the objective is to maintain the high level of performance that has already been attained.

Much of the data for computing the various metrics already exists within School records, but it is not necessarily in a form that is easy to obtain. In addition, large amounts of student information is in paper files that may take years to process, so much of the information system building will have to be done in support of current needs associated with advising, career development, and placement. In addition, some information will need to be collected by faculty (e.g., number of companies represented at a meeting), and this requires a degree of discipline that may be hard to realize.

Various surveys are mentioned in Table 3 as sources of information. The University has initiated a survey program in conjunction with the SACS reaccreditation review that captures information from students, alumni and faculty. These surveys have school information, so it

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is possible to separate Management's information from the rest of the information. In addition, it is possible to compare Management with the UTD results, which provides some information about relative performance within the university. The exit survey does not exist and would have to be developed within the School and administered through the advising office.

Table 3. Objectives and Metrics, 1997-2002

Standard	Objective	Metrics
Quality	Create and maintain student services of the highest quality.	<ul style="list-style-type: none"> • percentage students with confirmed degree plans • percentage students with completed career assessment counseling • percentage students completing resume review • percentage students completing video feedback review session • number students participating in the coop/internship program • number students served by interviewing skills training • number of students registered for career placement • composite satisfaction with student services (periodic student sample)
	Improvement and maintain quality of students	<ul style="list-style-type: none"> • relative scores on standardized tests (SAT and GMAT) • entrance GPA <ul style="list-style-type: none"> – undergraduates: lower division – graduates: undergraduate • core GPA • % students graduating on schedule based on their degree plan • number students graduating with honors • number of students completing honors theses • prior work experience, years • prior work experience, responsibility • percentage students without work experience participating in coop • percentage coop students given offer of permanent employment • percentage students graduating with work experience
	Continuous improvement in program quality as perceived by students, alumni and employers	<ul style="list-style-type: none"> • composite program satisfaction index (periodic student sample) • willingness to recommend program to friend (periodic student sample) • composite program satisfaction index (exit interview survey) • willingness to recommend program to friend (exit interview survey) • alumni satisfaction with education (periodic alumni survey) • alumni willingness to recommend program to co-worker (periodic alumni survey) • perceived impact on salary (alumni survey) • perceived impact on promotions (alumni survey) • employer composite satisfaction score (employer survey) • employer willingness to send employee to SOM (employer survey) • employer willingness to hire SOM graduate (employer survey) • qualitative information from employer focus groups • advisory board perceptions of program quality
	Recognition of educational quality by corporate recruiters	<ul style="list-style-type: none"> • number of corporations interviewing students • number of corporate resume solicitations and internet screening interviews • offers extended to graduates ÷ graduates using placement • average salary offers

Table 3 (continued)

Standard	Objective	Metrics
Quality (continued)	Improve and maintain faculty quality	<ul style="list-style-type: none"> • per capita research productivity • faculty teaching publications • maintain and improve overall faculty score on teaching evaluations • maintain and improve overall faculty score on student course evaluations, composite satisfaction index • participation in School service activities • participation in community service • faculty awards for teaching and service • faculty providing professional development mentoring • faculty teaching in campus teaching development workshops • faculty participating in campus teaching development workshops
	Research profile of School	<ul style="list-style-type: none"> • number faculty publications in leading journals • number of faculty presenting at professional meetings • number invited presentations by faculty • number of doctoral students placed in leading universities • percent students in academic and non-academic research institutions • Ph.D. placements in industry • number of former doctoral students with tenure in leading universities • number of faculty on editorial boards • number of faculty serving a journal editors • number of research awards • total research citations
Business Partnerships	Business involvement in School activities	<ul style="list-style-type: none"> • number of business people attending School events • number of businesses represented at School events • number of business people speaking to School classes • number of companies sending speakers to School classes • number of business people serving on program advisory boards • number of business people continuously involved in professional activities sponsored by School
	Development of strategic partnerships	<ul style="list-style-type: none"> • number of firms with joint activities with School • number of strategic alliances with firms • number of joint activities with firm sponsorship • funding provided by firms in strategic partnerships • number employees in executive programs • number strategic partners participating on School committees
	Expanded hiring by Advisory Council and President's Leadership Council firms	<ul style="list-style-type: none"> • number of students interviewed • number of students hired • number of internships and coop positions provided • number of coops and interns hired

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Increased research funding from AC and PLC	<ul style="list-style-type: none">• number of research grants provided• dollar value of research grants provided• joint research seminars funded• distinguished visitor funding provided
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Table 3 (continued)

Standard	Objective	Metrics
Business Partnerships (continued)	Engagement with student projects	<ul style="list-style-type: none"> • number of firms supporting student projects • number of honors theses completed with firms • number of student projects involving firms • number doctoral dissertations completed with firm cooperation
	Joint development of educational programs and executive education	<ul style="list-style-type: none"> • number firms sitting on program advisory committees • number of firms represented at program curriculum reviews • number of programs initiated by firms • number firms represented in executive programs
SOM Alumni Involvement	Establish SOM Alumni Association (SOMAA)	<ul style="list-style-type: none"> • number of alumni on mailing list • number of SOMAA members • percentage mailing list that are SOMAA members • percentage known alumni in alumni directory
	Expand alumni participation	<ul style="list-style-type: none"> • number of alumni that are members of the alumni association • number of alumni in alumni database • number of alumni serving on School committees and advisory groups • number of alumni attending alumni events
	Expand executive alumni participation	<ul style="list-style-type: none"> • number of executive program alumni that belong to alumni association • number of executive program alumni making donations to the School • amount of donations by executive alumni • number of executive alumni serving on School committees and advisory groups • number of executive alumni attending special executive alumni events
	Increase alumni donations to School	<ul style="list-style-type: none"> • number of alumni giving money to the School • amount of alumni donations • percent of total alumni giving to School
	Increase involvement in placement and internships	<ul style="list-style-type: none"> • number of alumni agreeing to act as placement contacts in their firms • number of alumni participating in resume reviews • number of alumni agreeing to act as internship program contacts in their firms • number of alumni mentoring students
School Visibility	Expand placement activity and marketing of graduates	<ul style="list-style-type: none"> • composite satisfaction, placement/career services (exit survey) • number of annual hits on graduate resume web page • number of students using career services • % students using career services • number of contacts made with hiring companies • number of companies participating in career fairs • number of companies sending speakers to career activities

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Increase number and quality of companies hiring at UTD	<ul style="list-style-type: none">• total number of companies interviewing School graduates• number of companies offering management positions• average size of companies interviewing• average starting salary of jobs listed• number Fortune listed companies interviewing
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Table 3 (continued)

Standard	Objective	Metrics
School Visibility (continued)	Raise and maintain research profile of School and faculty in the business community	<ul style="list-style-type: none"> • number applied research projects done with companies • number media interviews, quotes, mentions • number of faculty talks to professional groups • number of faculty presentations at firms • number of faculty consulting engagements • number of faculty serving on external boards, as advisors to professional associations, etc.
	Create and maintain SOM publications and communications office	<ul style="list-style-type: none"> • number of communications about School distributed • number of communication contacts with business community • number of speeches and public appearances by School and University official on behalf of the School • number of newsletters issues developed in year • total number of newsletters distributed • total number of direct contacts per year • number of School brochures distributed • number of phone calls placed • number of letters written • number of advertising placements per advertising dollar • number of responses to advertising • distribution of Dean's Honor Roll • development and publicity of School recognition programs
	Recognition for excellent executive education	<ul style="list-style-type: none"> • number of executive education alumni reporting promotions • number of students enrolled in executive education programs • number executive students referred by executive alumni • number executive students sponsored by sponsors of previous students • rankings in external reviews and surveys
	Recognition by other business school deans	<ul style="list-style-type: none"> • biennial survey of reference school deans • AACSB surveys
Resources	Increased state revenues through enrollment increase	<ul style="list-style-type: none"> • increase number of students in School • increase ratio MBA students to all other students • increase proportion revenue positive course sections
	Increase discretionary funds from donations and endowments	<ul style="list-style-type: none"> • Annual campaign donations • giving for capital improvement • number of businesses making annual contribution to School • total donations to School • total donations of services and products • total endowment
	Executive program residual funds	<ul style="list-style-type: none"> • increase in number of students in existing programs • number of students in new programs • number of students in non-credit programs • number of students completing certificate programs

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External research funding	<ul style="list-style-type: none">• number of contracts and grants• dollar value of contracts and grants
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Table 3 (continued)

Standard	Objective	Metrics
Resources (continued)	Infrastructure maintenance and development	<ul style="list-style-type: none"> • average age of computer platforms • faculty perceptions of technical support (campus survey) • distance from technology targets • office square footage per employee • classroom evaluations (course evaluation)
	Human capital development	<ul style="list-style-type: none"> • percent faculty participating in performance development • percent faculty achieving annual goals • summer research funds for junior faculty • seed money research grants • percent available positions filled • percent candidates accepting School offers • faculty retention

Plan Implementation

The implementation plan is organized differently than the strategic plan. The strategic action plan is organized to reflect programmatic efforts, but implementation involves the coordinated actions of area faculty, faculty committees, and the School's administrators. Accordingly, actions must be sequenced, assigned as specific responsibilities, and deadlines must be established to keep the entire effort on track. Based on this coordination problem, the implementation process is defined in terms of three major cycles:

- *foundation work*, which includes the design of an information system, making it possible to assess progress in all areas of School development, and area curricula evaluations, reviews, and planning;
- *development work*, including putting together proposals for new activities and reorganizing key systems; and
- *program activities*, which includes specific changes, but also the establishment of systems for continuous development.

The implementation plan does not deal with minor resource problems. It is assumed — and the Dean has encouraged those doing the planning to adopt this assumption — that the Dean's office will take care of problems that may arise involving resources. So, for instance, it is assumed that the Dean's office will resolve the problem of identifying funds to pay for the expansion of the advising, career services, and placement functions recommended below. Major resource creation activities, such as efforts to raise endowment funds, organizing an alumni organization, and expanding executive education are treated as strategic actions and included in the implementation plan.

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Foundation Work

Some of the implementation tasks for specific areas will originate with program committees, while others require all areas to conduct a basic self-assessment and to develop a curriculum delivery plan that will allow the appropriate program committees to define 2, 3, and 4 year graduation tracks. In addition, a number of administrative policies need to be established by the Dean's office and reviewed by the faculty as appropriate. All the foundation work discussed below needs to be completed in 1997, and in most cases the schedule calls for implementation to be complete in early summer.

The only way that it will be possible to track the implementation of the strategy and monitor its effectiveness over the next five years is if the measures necessary to track progress are in place. This is the key foundation work responsibility of the Dean's office. Some of the metrics described in the plan are going to have to be gathered outside the administrative apparatus of the School, but a great deal of the information that is needed will come from within the School, and an information system needs to be created to gather and compile this information, as well as provide a mechanism for integrating outside information.

The implementation plan for this foundation work is outlined in Table 4. It is recommended that a task force appointed by the Dean resolve basic policy issues, then hand off their recommendations for administrative implementation. Anticipated implementation includes availability of one prior year's data plus full operational availability in time for Spring 1998 registration.

**Table 4. Strategy Implementation Plan for Administration,
Foundation Work**

Dates	Action	Evaluation
by May 1997	Creation of information system task force	
by August 1997	Task force report: <ul style="list-style-type: none"> • software recommendation • data structure and access/security • implementation process 	
by December 1997	Basic information system in place with 1996-97 data.	• operational
by May 1998	Information for 1995-96 and 1997-98 in place	• operational
by August 1998	Real time data availability	• operational

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Area Curriculum Reviews. Programs were thoroughly reviewed in the course of the strategic planning process, but the course offerings of particular areas were not thoroughly reviewed. Because program committees are not in a good position to understand the curriculum in an area, part of the foundation work necessary to begin implementation of the strategy is a thorough review of courses and curricula by area faculty.

The faculty in each area within the School need to review their course inventory and curricula and come up with area objectives that support the School's mission and strategic objectives. Each area in the School is asked to review its course offerings in light of the strategic plan and to discuss potential curriculum and program changes. This self-assessment should begin with a review of the area's course offerings that looks at:

- 1) Total revenue relative to costs. Revenue for undergraduate courses is \$45.26 per student credit hour for lower division courses and \$51.14 per student credit hour for upper division courses. Master's level courses generate revenues of \$161.20 per student credit hour and Ph.D. courses generate \$451.83 per student credit hour, but only for students with a master's degree or 30 cumulative hours. The master's and Ph.D. numbers include enrichment money. The faculty salary cost for a course is \$20,000 for tenure track faculty, the senior lecturer cost is \$4,750, and lecturers cost \$1500 per course. Area offerings must be revenue positive to cover staff, overhead, supplies, and other costs.
- 2) The self-assessment should also look at relative coverage by tenure-track faculty, senior lecturers, and lecturers. Because the School has accreditation as a key objective, each area needs to be aware of how courses are being covered, especially at the undergraduate level.
- 3) Area faculty need to discuss how to either make their offerings revenue positive or maintain their offerings at a revenue positive level if the staffing mix changes (e.g., if tenure track faculty are added this year and lecturers or senior lecturers are lost). Hiring additional tenure track faculty is going to be good for accreditation, but it may cause problems in terms of remaining revenue positive in the courses offered by the area.

Based on this self-assessment, area faculty need to make decisions about how the area will contribute to the School's mission, plan how the area will contribute to the success of the School's strategy, and make decisions about how the area will contribute in the future. Should an area decide to propose changes in curriculum or programs, the area will need to put together a proposal and forward it to the appropriate program committee. This proposal should detail both the changes proposed and the benefit to the School in terms of the implementation metrics detailed in Table 3.

The schedule for the completion of area reviews is listed in Table 5. It is likely that most areas will be able to complete their review in a single meeting. The purpose of the meeting is not to lay waste to programs, but for the faculty in each area to get together and decide how they plan to contribute to the future of the School. And where the faculty in an area see

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opportunity to expand and make a positive contribution, they should do so with enthusiasm. The School's strategy is to grow its enrollments at the master's level, so ideas that will contribute to this growth while maintaining the School's high standards for quality are encouraged and will be supported.

Table 5. Strategy Implementation Plan for Areas, Foundation Work

Dates	Action	Evaluation
by May 1	Curriculum and course review submitted by Area Coordinators to Dean's Office	• revenue positive
by May 9	Curriculum proposals to appropriate program committees	• revenue positive • quality metrics • visibility metrics • resources metrics

Development Work

Development activities span the entire 5 year period of the strategic plan. They range from the immediate capability development associated with the re-engineering of advising–career services–placement process to the longer term development activities associated with fund raising and alumni involvement. In addition, development work includes administrative system development in the near term and longer term information system evaluation and refinement. In all cases systems and capabilities must be created and maintained, but the projects vary greatly in scope and immediacy.

The principal development activities specified in the strategic plan are in administrative systems, advising–career services–placement re–engineering, external relations development and executive education. The top priority items all require administrative actions, including advising–career services–placement, the performance development system, and development of an integrated information system capability that supports Career Services, the strategy implementation effort, and the Dean's office.

A number of key development actions have already been implemented. For instance, a staff member has been added with responsibility for publications, the Dean's office has already created a strategy for near term fund raising, and considerable effort is going into establishing strategic alliances and partnerships. The development implementation outlined here focuses on six major initiatives:

- developing key partnerships and strategic alliances;
- establishing a School of Management Alumni Association;
- creating a plan for cultivating and managing external relations;
- re–engineering the advising—career services—placement function;

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- a thorough review of Executive Education, including existing programs and the administrative apparatus currently in place;
- a baseline installation of the performance development system for faculty.

External Relations. Three of the major development initiatives involve immediate and ongoing activities that include the Dean's office and the External Relations Committee. The efforts already initiated include putting basic processes for managing strategic partnerships and alliances into place, creating a capability for raising discretionary funds for the School, and establishing a School of Management Alumni Association.

Because the basic strategic initiatives proposed by the External Relations Subcommittee (see report in Appendix F) involve creating new capabilities, all the actions that are included in the development responsibilities for this group are "beginnings." The timetable for this implementation is presented in Table 6. Several of the strategic initiatives proposed by the External Relations Subcommittee have already been launched, and there are several others that are about to be launched soon. Because these initiatives are building capabilities that have not previously existed, the evaluation of success will be ongoing improvement on every metric.

Re-engineering Advising-Career Services-Placement. Reworking student services delivery is an extremely important change in strategy, but it also presents thorny implementation problems. What currently exists is Advising, and Advising is a morass of paper files, bureaucratic rules, and strict administrative requirements and restrictions. There is no operation in the School that is more dominated by its history than Advising.

The central change problem in the Advising Office is that current services must be continued, files must be maintained, and the School is required to adhere to old catalogs and rules at the same time that change is taking place. There is no way to avoid running a dual system in this office while the information system and programs necessary to support Career Services are being implemented. Once a foundation is in place for services delivery, then new students can be captured by the new system while the old system continues to serve those that are already advanced in their program of study. Once the new information system and Career Services are in place and both are operating smoothly as new students are brought into the operation, then existing students can be ported into the system, with current students taking first priority. This porting will continue with students that are currently enrolled until all current students are ported into the system. At this point, an evaluation will have to be done to see whether it is worth moving the entire paper data base into the information system. Most likely it will not, and file cabinets will have to be stored and accumulate dust for the next 10 years.

There are true costs in running a dual system and bringing generations into the new system, but the bureaucratic mandate requires it. It will be worth the costs to move away from the current system and begin providing competitive student services.

The implementation schedule for the creation of Career Services is detailed in Table 7. This office will eventually integrate advising-career services-placement into a single, seamless process that addresses the needs of individuals that intend to advance within their current company as well as those looking to launch a career with a different company. Implementa-

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tion of this plan will be the responsibility of a task force that includes the College Master and Head of the Master's Programs, the current manager of Advising, and one or more TAs with experience working in advising. The job of this task force is to define the service delivery standards that will be the basis of Career Services. The foundation work done by the Dean's office on the School information system will deal with the information systems issues within Advising and Career Services.

**Table 6. Strategy Implementation Plan for External Relations,
Development Work**

Dates	Action	Evaluation
March 1997	Establish President's Leadership Circle with first strategic alliance	<ul style="list-style-type: none"> • partnerships • visibility • resources
March 1997	Establish PR function, begin developing PR/media plan for School	<ul style="list-style-type: none"> • visibility • partnerships
April 1997	Establish SOM Development Agenda	<ul style="list-style-type: none"> • visibility • partnerships • resources
May 1997	Initiate SOM image building campaign	<ul style="list-style-type: none"> • visibility
June 1997	Begin revitalizing Advisory Council membership	<ul style="list-style-type: none"> • partnerships • resources
June 1997	Launch SOM Alumni Association	<ul style="list-style-type: none"> • alumni
Summer 1997	Coordinated promotional campaign	<ul style="list-style-type: none"> • visibility
Summer 1997	Begin large donor prospecting	<ul style="list-style-type: none"> • partnerships • visibility • resources
Fall 1997	Begin working foundation agenda	<ul style="list-style-type: none"> • partnerships • visibility • resources
December 1997	Announce initial PLC with membership of 3-5 companies, associated alliances	<ul style="list-style-type: none"> • partnerships • visibility • resources

Table 7. Strategy Implementation Plan for Career Services Task Force

Dates	Action	Evaluation
by May 5, 1997	Task force appointed to study integration of advising–career services–placement processes College Master Head of Master’s Programs Advising Manager Graduate TA Career Services Director (once appointed)	
by October 1997	Career Services Director hired	
by November 1997	Career Services Plan finalized	
by January 1998	Career Services up and running	
by Spring 1998	All incoming students processed with degree plans, career services assessment schedule, and draft resume	<ul style="list-style-type: none"> • percent incoming students processed
by Summer 1998	All graduating students processed through Career Services	<ul style="list-style-type: none"> • percent target students processed • exit interviews
by Fall 1998	All incoming and graduating students processed	<ul style="list-style-type: none"> • percent target • quality metrics
by March 1999	All students graduating in 1999 processed	<ul style="list-style-type: none"> • quality metrics
by April 1999	Summer internship program operating	<ul style="list-style-type: none"> • quality metrics • visibility metrics
by September 1999	All enrolled students processed through Career Services planning and consultation	<ul style="list-style-type: none"> • quality metrics • visibility metrics
by December 1999	Announcement of corporate recruiting schedule	<ul style="list-style-type: none"> • quality metrics • visibility metrics
April 2000	Evaluation of Career Services Office	<ul style="list-style-type: none"> • quality metrics • visibility metrics

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Table 8. Strategy Implementation Plan for Executive Education Review

Dates	Action	Evaluation
May 1997	Appoint Review Committee – Executive Education Committee – Advisory Council representatives – Alumni representatives – Program Board representatives	<ul style="list-style-type: none"> • quality • partnerships • alumni • visibility • resources
Summer 1997	Initial Review Committee Report	
Summer 1997	Formulation of Executive Programs strategy	<ul style="list-style-type: none"> • quality • partnerships • visibility • resources
Summer 1997	Appointment of EMBA Director	
Fall 1997	Restructuring of Executive Programs responsibilities	<ul style="list-style-type: none"> • quality • resources

Executive Education Programs Review. Executive Education programs are beginning to be of greater important to the School as generators of resources, but more importantly as the foundation for enduring partnerships, as a generator of involved alumni, and as an important source of external visibility. Given these contributions, it is important that serious consideration be given to the delivery and structure of these programs.

The Executive Education Subcommittee recommended a thorough review of the School's existing executive programs with representation of key constituencies in the review process. Based on this review, the Executive Education Committee will develop recommendations for improvements and changes in these programs. The schedule for this review is in Table 8.

The Executive Programs review is also scheduled to take up the issue of the administration of the Executive Programs. When the current structure was devised, there was only one executive program, the Executive MBA. In the interim, two other programs have formed, and it appears many other opportunities are on the horizon. Seizing these opportunities and maintaining the successes already achieved in Executive Education require that the Associate Dean be separated from his Executive MBA responsibilities and that separate individuals

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focus on what are two distinct roles. Other administrative and structural changes are also needed, and it is anticipated that the Review Committee will take these up.

**Table 9. Strategy Implementation Plan for
Faculty Performance Development**

Dates	Action	Evaluation
by June 1997	Finalized and approved: Faculty Development Policy Faculty Workload Policy Faculty Evaluation Policy	• approved
Summer 1997	Faculty Performance Development procedures defined and ready for implementation.	• published
January 1998	End of year reports due	
February 1998	All faculty goal-setting completed for 1998 in consultation with the Dean	• quality • visibility

Faculty Performance Development. There is nothing about a performance development system that is especially novel. Indeed, it is much more consistent with concepts of academic freedom than a traditional performance appraisal system. By asking each faculty member how they would like to make a contribution, the Dean can better understand how members of the faculty see their personal preferences and career demands, and then the two parties can work together to define a contributions plan that meets the demands of the job, the aspirations of the individual faculty member, and the needs of the School.

The schedule for implementation is given in Table 9. This process will begin in conjunction with the university reporting requirement in 1998. Thereafter, the goal-setting *and* evaluation processes are expected to coincide with the annual university reporting requirement.

**Table 10. Strategy Implementation Plan for
Teaching Evaluation Policy**

Dates	Action	Evaluation
Summer 1997	Teaching Committee completes draft policy.	• completion
Fall 1997	Policy reviewed by APPC	

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Fall 1997	Faculty meeting to comment and vote on policy.	
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Table 11. Strategy Implementation Plan for
Area Journal Classification

Dates	Action	Evaluation
by June 2, 1997	Ranking plan submitted to Steering Committee for comment.	• completion
by July 1, 1997	Final classification system to Dean's Office.	• completion

The performance development system requires established metrics for evaluating faculty contributions. While it is fairly easy to document publications, teaching contributions are much more problematic. It is clear that course evaluations do not capture the full range of teaching contributions. Furthermore, it is very desirable for promotion and review purposes to have a set of teaching metrics. The University has a teaching evaluation policy that requires the development of such metrics, a policy that the School's Teaching Committee has reviewed and is the process of implementing. This implementation is needed for the performance development system, so the development work for the strategy includes completion of this task. The schedule is given in Table 10.

The performance development system also requires that area faculty classify the journals in their area by quality. The important role of this quality classification is not to make fine discriminations between the third and fourth journals in an area, but instead to provide a sorting of publications into desired, acceptable, and below standard. While area faculty can likely complete this task through some ranking procedure, they are asked to provide some documentation for their ranking so that there is some external validation. This documentation can take the form of citation frequencies for journals, rankings by the Social Science Citation Index, studies in professional journals, or any other external evaluation that provides a basis for this rough sorting. The schedule for completing this is in Table 11.

Program Activities

The Strategic Planning Subcommittees that evaluated programs and developed the fundamental program strategies coincide with the School of Management program committees that have responsibility for the undergraduate program, master's programs, Ph.D. programs, and executive education. Because these committees have the detailed knowledge of issues and priorities, the implementation planning for specific program initiatives will be left to these committees.

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The Strategic Planning Steering Committee will continue to monitor the strategy implementation, and so will review the program committee implementation plans once they are completed. The time table for developing an implementation agenda is given in Table 12. The appointment of a Director is included in this implementation schedule because this individual needs to be involved in the implementation planning for the master's programs. This individual will be the equivalent of the College Master and will have primary responsibility for the regular MBA program.

Table 12. Strategy Implementation Plan for Program Committees

Dates	Action	Evaluation
by May 1997	Dean appoints Director of Master's Programs	
by May 2, 1997	Program committees submit implementation plan to Steering Committee	• all metrics
May 6, 1997	Steering Committee review of program committee implementation plans	• all metrics

Plan Review and Integration

The Steering Committee will maintain ongoing responsibility for monitoring the implementation of the strategic plan and for evaluating the progress and effectiveness of the implementation. Because the events that informed this plan may be moot by next year, opportunities can spring up that were unforeseen at the time the plan was developed, and shit happens, the plans here will be continually reviewed and revised as they are implemented.

In order to assure the “plan” does not take over the planning process, the Steering Committee will revisit the plan annually and make changes as seem appropriate. The schedule for these reviews is in Table 13.

Table 13. Strategy Reviews, Steering Committee

Dates	Action	Evaluation
October 1997	Annual plan review and revision	• all metrics
October 1998	Annual plan review and revision	• all metrics
October 1999	Annual plan review and revision	• all metrics
October 2000	Annual plan review and revision	• all metrics
October 2001	Annual plan review and revision	• all metrics
October 2002	Five year planning process	• re-evaluate metrics

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Some strategic initiatives do not have specific implementation plans at this time. For instance, establishing research funding for junior faculty is something that requires a resource commitment from the Dean. Rather than develop an implementation calendar that strives to predict an unpredictable future, such actions are left unscheduled for the moment. This does not mean they are unimportant. Rather, it means that they are important and will not be cast aside just because they cannot be implemented immediately. When the time is right, these will become priorities. And if the strategy is implemented with the same enthusiasm and commitment that went into the strategic planning process, the time will be right very soon. The Steering Committee has responsibility for ensuring all aspects of the strategy are implemented at some point.

AACSB Candidacy

A task force, under the leadership of Dean Pirkul, will assume coordinating responsibility for the AACSB candidacy process. This is a major endeavor with important implications for the future of the School, so integration of the accreditation effort with the strategic planning process that has been central to reassessing the School's mission makes great sense.

In conjunction with the AACSB candidacy process, the Candidacy Task Force will be evaluating the various review, evaluation, and continuous improvement processes that currently exist within the School and working with the Strategic Planning Steering Committee. As is detailed in the SACS evaluation of the School, considerable review, evaluation and development exists within the School, but it tends to be informal and ad hoc (see Appendix H for a copy of the SACS report). The strategic planning process has mobilized these informal processes to develop a comprehensive evaluation of the School, but nothing in the strategic plan mandates the development of systematic processes for evaluation and review. This is something that the Candidacy Task Force and Steering Committee must take up as they begins to integrate the strategic planning process with the AACSB candidacy process. The broad schedule for accomplishing this in Table 14.

Table 14. AACSB Candidacy, Task Force and Steering Committee

Dates	Action	Evaluation
April 1, 1997	Task Force appointed, distribution of AACSB candidacy material	completed March 24
April-May 1997	Visit by AACSB Advisor	preparation
May 6, 1997	Discussion of integration of strategic planning with candidacy, Steering Committee meeting	integration plan
June 1997	Draft of AACSB Accreditation Plan	completion

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by July 15, 1997	Submission AACSB Accreditation Plan	submission
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APPENDIX A Strategic Planning Process

The School of Management Strategic Planning process was defined with three major objectives:

- obtain the advice and guidance of individuals representing many different perspectives on the School and its future;
- involve individuals with a demonstrated commitment to the School's success; and
- ensure those implementing the plan "own" the strategic actions developed in the course of the planning process.

The process followed in completing the strategic plan achieved these objectives by involving a large number of individuals representing many different stakeholders, including the School's administrators, UTD administration, the Business Advisory Council, the faculty, alumni, and current students. A total of 57 individuals participated in the planning process as subcommittee and committee members, and numerous other members of the Advisory Council participated in an all day retreat designed to elicit greater input into the School's plans.

Committee Structure

The planning process was structured around the School of Management's program committees (undergraduate, master's, executive, and Ph.D.). These committees are the starting point for all program review and modification that takes place on a regular basis, and they are the starting and implementation points for the strategic planning process. Members of the Advisory Council volunteered for these committees, and these joint membership committees became the subcommittees in the strategic planning process. These subcommittees and their members are listed in Table A1. The reports of these subcommittees are included as Appendices B-G.

In addition to program subcommittees, a subcommittee was appointed to examine the School of Management's community and corporate relationships. This subcommittee's charge included looking at how the School works with the business community, which involves issues as wide ranging as placement and fund raising.

An additional subcommittee was appointed with responsibility for the strategic planning process, the Steering Committee. This committee was in charge of managing the workflow of the strategic planning process, including reviewing subcommittee reports for completeness, preparing documents for the Strategic Planning Committee, and ensuring that the subcommittee reports reflected School level interests. The Steering Committee was chaired by Dean Pirkul and included Dr. Sydney Hicks, Chair of the Business Advisory Council, Max Hop-

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per, Vice Chair of the Business Advisory Council, and the chairs of all the strategic planning subcommittees. This committee played a key role in keeping the strategic planning process on schedule and ensuring information and reports were available to the Strategic Planning Committee.

Table A1. Strategic Planning Subcommittees

Steering Committee	G. Kalyanaram, Chair
Frank Bass, Marketing	C. Konstans, Accounting
Jack Brittain, OSIM	Chad Nehrt, OSIM
Sydney Hicks, Advisory Council, Sterling Commerce	Dale Osborne, Economics
Max Hopper, Advisory Council	
G. Kalyanaram, Marketing	
Connie Konstans, Accounting	
Stan Liebowitz, Assoc Dean	
Larry Merville, Finance	
Diane McNulty, Assoc Dean	
Hasan Pirkul, Dean and Chair	
David Springate, Assoc Dean	
Undergraduate Programs	
Jerry Bergthold, Advisory Council, Spar- rowhawk Industries	
Levy Curry, Advisory Council, PageNet	
Constantine Konstans, Chair, Accounting	
Stan Liebowitz, Assoc Dean	
Ken McGill, Advisory Council, Fujitsu Network Transmission	
Diane McNulty, Assoc Dean	
B.P.S. Murthi, Marketing	
Ray Patterson, Accounting	
Carl Peters, MIS	
Young Ryu, MIS	
Tom Wageman, Advisory Council, TLT, Ltd.	
Habte Woldu, OSIM	
Laurie Ziegler, OSIM	
Masters Programs	
Deena Andrus, Student	
Paul Gaddis, OSIM	
Steve Guisinger, OSIM	
Richard Harrison, OSIM	
Gary Horton, SOM Advising	
Gil Hurley, Advisory Council, EDS	
Joakim Kalvenes, MIS	

Ph.D. Program

Frank Bass, Chair
Chuck Best, Advisory Council, Crestwood
Asset Management
George Brody, Advisory Council, Nortel
R. Chandrasekaran, Decision Sciences
Shun Chen Niu, Decision Sciences
Ted Day, Finance
Tarun Dewan, Ph.D. Student, Marketing
Richard Harrison, OSIM
B.P.S. Murthi, Marketing
Ram Rao, Marketing
Rex Sebastian, Advisory Council

Executive Education

Jack Brittain, OSIM
Robert Chereck, Advisory Council, Wells
 Fargo Bank
Steve Guisinger, OSIM
Bill Harmon, Advisory Council, Perot Sys-
tems
G. Kalyanaram, Marketing

Ray Lutz, Decision Sciences
John McCracken, Finance
Larry Merville, Finance
Marvin Newell, Advisory Council, McKin-
sey & Company
David Springate, Chair, Associate Dean

External Relations & Development

Frank Bass, Marketing
Ka Cotter, Advisory Council, The Staubach
Company
Paul Gaddis, OSIM
Steve Guisinger, OSIM
G. Kalyanaram, Marketing
C. Konstans, Accounting
Stan Liebowitz, Assoc Dean
Diane McNulty, Chair, Assoc. Dean
Hasan Pirkul, Dean
Robert Slater, Advisory Council
Allan Tomlinson, Advisory Council, Con-
sultant
Frank Winnert, Advisory Council,
Consultant

Table A2. Strategic Planning Committee

Administration	Stan Liebowitz, Associate Dean Diane McNulty, Associate Dean Hasan Pirkul, Dean	David Springate, Associate Dean Hobson Wildenthal, Provost
Advisory Council	Sydney Hicks, Sterling Commerce Gerry Hoag, A.T. Kearney Max Hopper, Max Hopper Associates Pete Kline, Bristol Hotel	Marvin Newell, McKinsey & Company Allan Tomlinson, Consultant Frank Winnert, Winnert Associates
Alumni	Doug Gordon, EMBA 1993, Trammel-Crow	David Permenter, M.A. 1995, Nortel
Faculty	Rod Barclay, Accounting Frank Bass, Marketing Jack Brittain, Organizations, Strategy and International Management R. Chandrasekaran, Decision Sciences Ted Day, Finance Dave Ford, OSIM Steve Guisinger, Organizations, Strategy and International Management	Mike Intille, Decision Sciences G. Kalyanaram, Marketing & Cohort MBA Director C. Konstans, Accounting Larry Merville, Finance Shun Chen Niu, Decision Sciences Sam Park, Organizations, Strategy and International Management Ray Patterson, Accounting Ram Rao, Marketing Sury Ravindran, Decision Sciences
Students	Deena Andrus, MBA Class of 1996	Tarun Dewan, Ph.D. Class of 1998

The Strategic Planning Committee (SPC) included representatives from the faculty, administration, the Business Advisory Council, alumni, and students enrolled in the School's pro-

grams (see Table A2). This representative group functioned as a decision making body with three specific responsibilities:

1. Developing a 10–year vision for UTD’s School of Management — and a Mission Statement consistent with this vision — to guide the School’s faculty and administration as they make key decisions about programs and the development of the School.
2. Discussing and evaluating the strategic options developed by the strategic planning subcommittees. This role as sounding board was critical as the subcommittees attempted to accelerate the process of creating strategic options in the midst of UTD’s SACS reaccreditation review, the launching of the Cohort MBA program, and significant faculty recruiting efforts.
3. Deciding the School’s strategic priorities and defining the nature of the partnership with the Business Advisory Council that will make the strategic plan a reality.

Unlike the subcommittees, which met on an irregular basis throughout the semester based on work load and Steering Committee requests, the Strategic Planning Committee completed its work during regularly scheduled events structured to complete specific tasks. These events were designed by the Steering Committee, all the information and reporting was prepared by the Steering Committee to maximize the SPC’s deliberation and decision making time, and Steering Committee members served as facilitators to ensure the SPC’s process was completed within the framework of the events. This does not mean the Steering Committee ran the SPC. As may be apparent from the membership of the SPC, its membership is too independent to be herded. Rather, the foundation work done by the subcommittees and the Steering Committee ensured that the SPC had the time and information needed to focus on major decisions and provide feedback on strategic alternatives.

Process Workflow

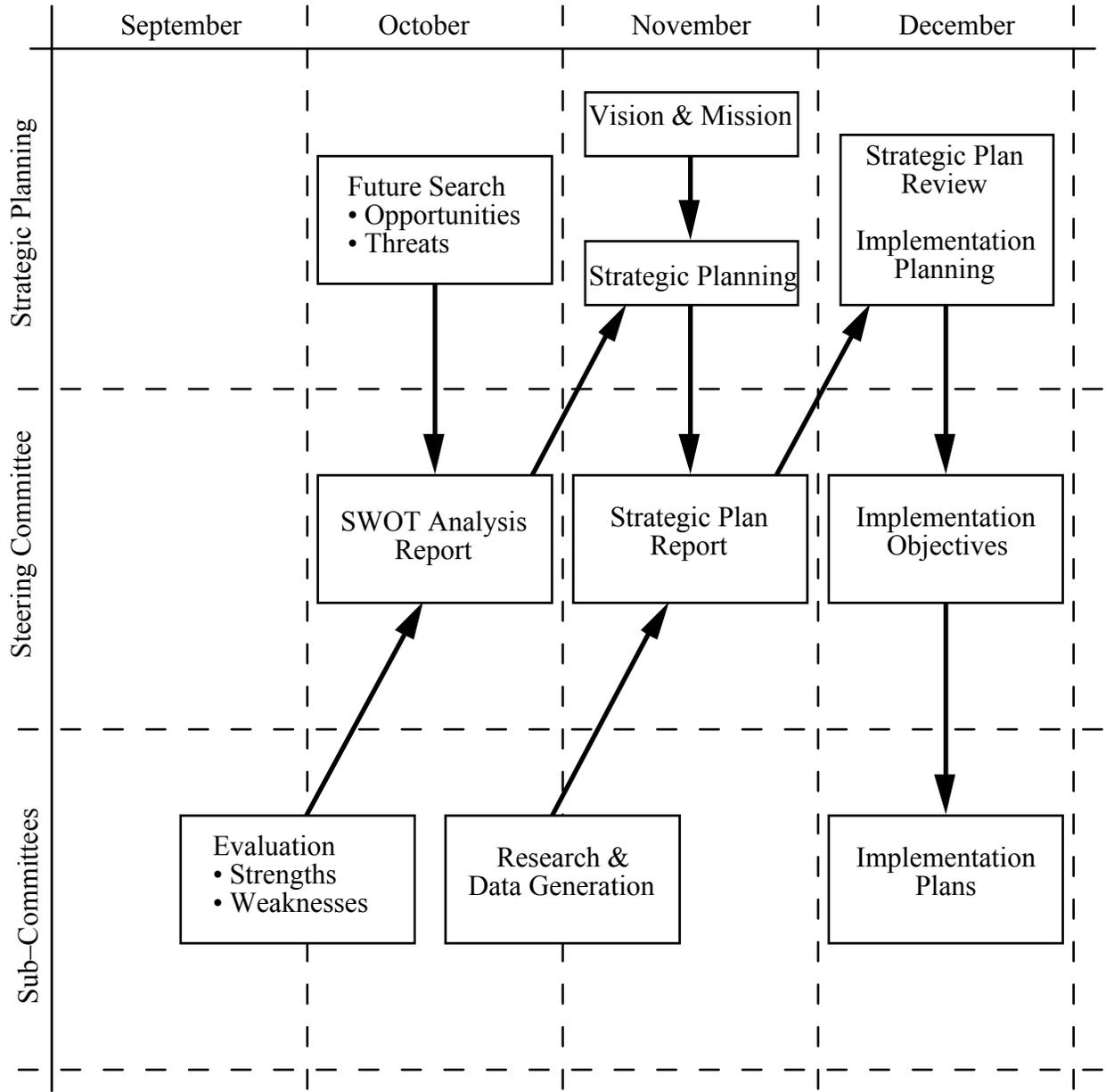
The Strategic Planning Process Workflow is diagrammed in Figure A1. The process began in September 1996 with the appointment of the Strategic Planning Subcommittees and the Strategic Planning Committee. Initial charges were developed for each of the subcommittees by the Steering Committee and background research was started. (See Exhibit A1 for the initial charges given to the committees and subcommittees). The process timetable and report flows are documented in Table A3.

The committee and subcommittee work done in September and early October largely focused on evaluation and formed the basis for a strengths and weaknesses compilation by the Steering Committee. The Strategic Planning Committee’s kick-off event was an adapted “future search,” a large group brainstorming process designed to produce collective insights into the challenges facing the focal organization. This brainstorming activity formed the basis for a discussion of the opportunities and threats the School faces in the next ten years. When coupled with the initial work done by the subcommittees, this became the SWOT (Strengths,

Weaknesses, Opportunities, Threats) Analysis compiled by the Steering Committee. This is included as Table G1 in Appendix G.

The next major task in the process was the creation of the vision and mission statements. The Steering Committee decided to adopt a blank slate approach to devising the mission statement and vision and created a visioning process for the Strategic Planning Committee to use in developing draft vision statements. The SPC worked on potential statements in small groups, then the pros and cons of each statement, phrase and idea was dissected by the large group. Based on the work of the SPC — which basically agreed on a wording for the vision statement and the basic outlines of the mission statement — the Steering Committee crafted vision and mission statements for final review. These were finalized at the joint Strategic Planning Committee–Business Advisory Council retreat in mid–November.

Figure A1. Strategic Planning Process Workflow



The SWOT Analysis and Vision and Mission Statements were the foundation for the core strategic planning effort that began in November. The key event in this stage of the process was an all day joint retreat that brought the Strategic Planning Committee together with the Business Advisory Council to discuss strategic options and to set strategic directions. The

Vision and Mission statements were the lenses for examining the many possible futures the SWOT Analysis indicated were viable choices for the School. In both large and small group discussions, issues were debated, actions clarified, and the implications of choices were sharpened as alternatives were evaluated and options defined. Much of the discussion at this event was led by the subcommittee chairs, while SPC members and Business Advisory Council members provided insights, critiques, and generated alternatives.

The November Strategic Planning Session was documented by the Steering Committee, and this information in turn was the basis for two Strategic Planning Committee sessions in late November and the middle of December. In the late November session, the SPC reviewed the results of the Strategic Planning Retreat and began setting action priorities. The agenda for the December SPC meeting was a continuation of the Retreat review, but with a focus on implementation of the strategic plan. Based on this input, the Steering Committee finalized the Implementation Objectives included in the Strategic Planning Report. Actual implementation planning is being done by the Strategic Planning Sub-committees and will continue over the 5 year time frame this plan is intended to cover.

Table A3. Strategic Planning Process Schedule

Week	Date	Strategic Planning Committee	Steering Committee	Subcommittees
1	September 9		Subcommittee appointments, charges announced	
2-5				Data gathering, preparation of reports
6	October 15			Evaluation Reports to Steering Committee
	October 16		Distribute Evaluation Reports Evaluation of School's strengths and weaknesses	
	Friday, October 18, 8-10 am	Kick-off meeting • Review Process Future trends brainstorming		
7	Tuesday, October 22, 9-noon		Review of Strategic Planning Committee session Continue SWOT Analysis Detailed feedback on Reports to Subcommittees	
	October 23-25			Discussions with key employers Focus groups with students Internship and co-op information gathering

Week	Date	Strategic Planning Committee	Steering Committee	Subcommittees
8	Tuesday, October 29, 9-12		<ul style="list-style-type: none"> • Interim SWOT Report to Subcommittees 	→
	Friday, November 1	←	<ul style="list-style-type: none"> Vision/ Mission statement material to Strategic Planning Committee 	
9	Tuesday, November 5, 9-noon	←	<ul style="list-style-type: none"> SWOT Report to Strategic Planning Committee 	→
	Friday, November 8, 8-10 am	<ul style="list-style-type: none"> Vision/ Mission Evaluation Discussion of straw man Vision and Mission Charge to Steering Committee 	←	<ul style="list-style-type: none"> Draft Reports returned to Steering Committee
10	Tuesday, November 12, 9-noon	←	<ul style="list-style-type: none"> Revised Vision and Mission Statements to Strategic Planning Committee 	
		←	<ul style="list-style-type: none"> Draft Planning Reports to Strategic Planning Committee 	

Saturday, November 16, 8 am-3 pm	Review of process Strategic planning by strategic issues Charge, Steering Committee		
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Week	Date	Strategic Planning Committee	Steering Committee	Subcommittees
11	Tuesday, November 19 9-noon		Prepare Interim Strategic Plan Interim Strategic Plan to Strategic Planning Committee	
	Friday, November 22, 8-10 am	Interim Strategic Plan Review Feedback, Steering Comm.		
12	November 29	Holiday		
13	Tuesday, December 3, 9-noon		Discussion of feedback on Interim Strategic Plan Interim Strategic Plan requests to Subcommittees	
	December 4-6			Complete data requests Submit updates to Steering Committee
14	Tuesday, December 10, 9-noon		Review of Strategic Plan, Subcommittee Updates Strategic Plan to Strategic Planning Committee	
	Friday, December 13, 8-10 am	Review Strategic Plan Discuss Implementation		

15	Tuesday, December 17, 9-noon		Implementation objectives Define evaluation criteria Define implementation process for Subcommittees	
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Attachment A1

STRATEGIC PLANNING FOR THE SCHOOL OF MANAGEMENT (REVISED 10/17/96)

The School of Management will develop a strategic plan during this fall semester. Our goal is to start the process the first week of September and complete it by December 15, 1996. For this purpose, we will appoint a Strategic Planning Committee which will be comprised of Advisory Council members, faculty members, alumni, students and staff. A subset of this committee will also serve on the Steering Committee. In addition, we will have a number of subcommittees organized primarily along program lines. These subcommittees will report to the Strategic Planning Committee. The chairperson of each subcommittee will be a member of both the Strategic Planning Committee as well as the Steering Committee. The Steering Committee will interact with the subcommittees and, based on information and analysis provided by the subcommittees, will formulate proposals to be discussed in the Strategic Planning Committee. The final document outlining the strategic plan will be the responsibility of the Steering Committee. We will also have a one-day retreat where the Strategic Planning Committee will meet with the Advisory Council to seek advice and formulate plans.

Process and Time Line: Subcommittees are appointed by September 1, 1996, and start work as soon as possible. Subcommittees provide interim reports to the Strategic Planning Committee by October 15th. Final reports from subcommittees will be due by November 1st. The Steering Committee of the Strategic Planning Committee will formulate a draft vision statement and a mission statement by October 15th. The Committee will use the reports of subcommittees to formulate proposals to create the strategic plan. During the month of November, the Strategic Planning Committee will finalize the mission and vision statements and, based on Steering Committee proposals, finalize the strategic plan. It will be the responsibility of the Steering Committee to prepare the final document. The following dates are tentatively set for the Strategic Planning Committee meetings:

October 18	8:00-10:00 a.m.	
November 8	8:00-10:00 a.m.	
November 16	8:00 a.m.-3:00 p.m.	(Joint meeting of the Advisory Council and the Strategic Planning Committee)
November 29	8:00-10:00 a.m.	
December 13	8:00-10:00 a.m.	

The Steering Committee will meet as needed to prepare proposals for the Strategic Planning Committee (will start meetings around the first week of October).

I. Strategic Planning Committee

Charge: To develop a 10-year vision for the school; to create a 5-year rolling horizon plan--as well as a mission statement--that is in line with this vision.

Committee Membership:

Chair: Dean, SOM, H. Pirkul

Members: Provost H. Wildenthal

Associate Dean S. Liebowitz

Associate Dean, Chair of External Relations Subcommittee D. McNulty

Associate Dean and Chair of Executive Education Subcommittee D. Springate

Chair of Undergraduate Program Subcommittee C. Konstans

Chair of Ph.D. Program Subcommittee F. Bass

Chair of Masters Program Subcommittee G. Kalyanaram

Other Faculty Members: R. Barclay, J. Brittain, R. Chandrasekaran, T. Day, D.

Ford, S. Guisinger, M. Intille, L. Merville, S. Niu, S. Park, R. Patterson,

R. Rao, S. Ravindran

Advisory Council Members: S. Hicks, G. Hoag, M. Hopper, P. Kline, M. Newell,

A. Tomlinson, F. Winnert

Alumni: D. Gordon, D. Permenter

Students: Undergraduate Student, D. Andrus (Masters), T. Dewan (Ph.D. student)

Staff: G. Topfer

II. Steering Committee

Charge: Interact with the subcommittees and formulate proposals and ideas to be discussed in the Strategic Planning Committee. Responsible for the final document.

Committee Membership:

Chair: H. Pirkul

Membership: F. Bass, J. Brittain, R. Chandrasekaran, G. Kalyanaram, C.

Konstans, S. Liebowitz, L. Merville, D. McNulty, D. Springate

Advisory Council Membership: S. Hicks, M. Hopper

III. Subcommittees

Charge: To collect data and conduct analysis to be an input to the final plan. The membership and the issues to be addressed by each committee are outlined below:

A. Undergraduate Programs :

Chair: C. Konstans

Membership: S. Liebowitz, D. McNulty, B. Murthi, R. Patterson, C. Peters, Y.

Ryu, H. Woldu, L. Ziegler

Advisory Council Membership: J. Bergthold, L. Curry, K. McGill, T. Wageman

- History, trends and student numbers (full-time and part-time)
- Estimates of program size in line with University growth policy, and our ability to provide a quality education

- An assessment of our program: strengths and weaknesses
- Place the program in regional and national market; our competition/rankings/curriculum
- Student make-up -- full-time versus part-time today as well as a projection
- Input measure: exam scores, local versus out-of-state versus international
- Demographics and its expected effect on our program
- Measures of success/quality
- Placement information--who are our customers?
- Alumni size and potential role they can play in development of the School
- Specialization versus general nature of program--student demands--employer demands
- What can we do to improve the quality of the program?
- Internship program, co-op program--what role now--what will the role be in the future
- Direction of the program
- What is the perception of our programs among students/potential students/employers?
- Class size--break even analysis (given funding and cost of delivery and quality)
- Funding
- Faculty composition and size to support this program
- Recruiting students

B. Masters Programs:

Chair: G. Kalyanaram

Membership: P. Gaddis, S. Guisinger, R. Harrison, G. Horton (ex-officio), J. Kalvenes, C. Konstans, C. Nehrt, D. Osborne

Student: D. Andrus

Advisory Council Membership: G. Hurley

- History, trends and student numbers (full-time and part-time)
- Make-up of our Masters programs
- How many students in each specialization/program
- Placement--job change--value added
- Reimbursement of tuition--what % of our students are reimbursed by employers
- An analysis of our part-time students by firm they work for
- Estimates of program size in line with University growth policy, and our ability to provide a quality education
- An assessment of our program: strengths and weaknesses
- Place the program in regional and national market; our competition/rankings/curriculum
- Student make-up--full-time versus part-time today as well as a projection
- Input measure: exam scores, local versus out-of-state versus international students
- Demographics and its expected effect on our program
- Measures of success/quality
- Placement information--who are our customers?

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- Alumni size and potential role they can play in development of the School
- Demand for our programs, student demands/employer demands
- What can we do to improve the quality of the program?
- Internship program, co-op program--what role now--what will the role be in the future
- Direction of the program
- What is the perception of our programs among students/potential students/employers?
- Class size--break even analysis (given funding and cost of delivery and quality)
- Funding
- Faculty composition and size to support this program
- Recruiting students

C. Ph.D. Program:

Chair: F. Bass

Membership: T. Day, R. Harrison, B. Murthi, S. Niu

Student: T. Dewan

Advisory Council Membership: C. Best, G. Brody, R. Sebastian

- Structure of Ph.D. curriculum/course offerings/number of courses by area
- Size/by area
- Demand
- Competition
- TA compensation/where do we stand with regards to our competition?
- TA responsibilities
- Funding
- History, trends and student numbers
- Estimates of program size in line with University growth policy, and our ability to provide a quality education
- An assessment of our program: strengths and weaknesses
- Place the program in regional and national market; our competition/rankings/curriculum
- Input measure: exam scores, local versus out-of-state versus international students
- Demographics and its expected effect on our program
- Measures of success/quality
- Placement information--who are our customers?, history and projection for the future
- Alumni size and potential role they can play in development of the School
- What can we do to improve the quality of the program?
- Direction of the program
- What is the perception of our programs among students/potential students/employers?
- Class size--break even analysis (given funding and cost of delivery and quality)
- Funding
- Faculty composition and size to support this program

D. Executive Education:

Chair: D. Springate

Membership: J. Brittain, S. Guisinger, G. Kalyanaram, R. Lutz, J. McCracken, L. Merville

Advisory Council Membership: R. Chereck, B. Harmon, M. Newell

- Competition - Executive MBA; short courses; part-time MBA, ODCM, MIMS
- Market
- Strategic Direction
- Faculty resources
- History, trends and student numbers

- Estimates of program size in line with University growth policy, and our ability to provide a quality education
- An assessment of our program: strengths and weaknesses
- Place the program in regional market; our competition/rankings/curriculum
- Student make-up
- Input measure: exam scores, years of experience
- Demographics and its expected effect on our program
- Measures of success/quality
- Who are our customers?
- Alumni size and potential role they can play in development of the School
- Student demands/employer demands
- What can we do to improve the quality of the program?
- What can we do to increase the size of the program?
- What is the perception of our programs among students/potential students/employers?
- Funding
- Faculty composition and size to support this program

E. External Relations/Development:

Chair: D. McNulty

Membership: F. Bass, P. Gaddis, S. Guisinger, G. Kalyanaram, C. Konstans, S. Liebowitz, H. Pirkul (ex-officio)

Advisory Council Membership: K. Cotter, R. Slater, A. Tomlinson, F. Winnert

- Alumni Relations Plan
- Short and long-term fund raising plan/corporate development activities
- Promotion of the School
- Publications
- Organizational structure to support activities
- Identify companies and assess potential for establishing strategic alliances
- Activities for our supporters
- Identify value to be provided to customers as it relates to development

APPENDIX B

Undergraduate Program Subcommittee Report

Jerry Bergthold, Advisory Council, Sparrowhawk Industries
Levy Curry, Advisory Council, PageNet
Constantine Konstans, Chair and Faculty, Accounting
Stan Liebowitz, Associate Dean for Academic Affairs
Ken McGill, Advisory Council, Fujitsu Network Transmission
Diane McNulty, College Master and Associate Dean
B.P.S. Murthi, Faculty, Marketing
Ray Patterson, Faculty, Accounting
Carl Peters, Faculty, MIS
Young Ryu, Faculty, MIS
Tom Wageman, Advisory Council, TLT, Ltd.
Habte Woldu, Faculty, Organizations, Strategy, and International Management
Laurie Ziegler, Faculty, Organizations, Strategy, and International Management

The subcommittee believes that the School of Management's (SOM) undergraduate programs (the Programs) should focus initially on the Dallas-Fort Worth region in building a strong student base. There are significant opportunities for the SOM to study, revise, expand and enrich the existing undergraduate programs and to place them in strategic niches. To accomplish this, the SOM must demonstrate a solid commitment to undergraduate education and not treat these programs as mere appendages to the graduate program, a perception shared by students and the business community. Furthermore, AACSB accreditation is critical if the School is to continue attracting high quality undergraduate students.

Analysis of Undergraduate Programs

In this section, an analysis is presented of the undergraduate programs' strengths and weaknesses as well as the opportunities and threats faced.

Strengths

The perceived strengths of the undergraduate programs are significant They include:

Location of UTD. The location of UTD near the Dallas Telecommunications Corridor is a significant strength of the undergraduate programs. Among other benefits is the ease of access to significant business and professional leaders. In addition, well over 75% of our students either live and/or work within 30 minutes travel time from the campus.

Student body quality. The excellent quality of the undergraduate student body results in part from admission standards that are at least as rigorous as any other school in The University of Texas System. In addition, the undergraduate scholarship program embarked upon in 1993 has attracted several cohorts of students with exceptional SAT scores (consistently over 1200). Also, UTD students have diverse backgrounds and may possess substantial work experience which further adds to their quality.

Course/Class offerings. In the Accounting area, the SOM offers a rich assortment of undergraduate courses at times convenient for students. Many classes offered at night, thus catering to students who work at full- or part-time jobs. Working students are a significant portion of the total number of undergraduate students. It has been suggested that non-accounting courses lack advanced or specialized content and may not sufficiently prepare students for the professional workplace. The subcommittee recommends that the SOM review and evaluate the undergraduate programs' core and elective requirements, in conjunction with an analysis of other undergraduate programs as excerpted in Appendix 2.

Tuition. As part of the University of Texas System, the relatively low tuition rates and fees make UTD much less costly than many private institutions of higher education. The tuition and fees structure are a major factor in attracting students to the undergraduate programs.

Weaknesses

The perceived weaknesses of the undergraduate programs are:

Limited undergraduate programs. As mentioned above, the SOM offers only two undergraduate majors and very little in the way of specialization. A survey of other undergraduate business administration programs in Texas, with emphasis on the Metroplex, would be helpful in determining what other degrees/majors currently are offered by similar institutions. If able to expand the undergraduate programs, UTD should consider the merits of such an expansion. A related issue is whether the current undergraduate programs sufficiently prepare students for their chosen professional market. The Subcommittee recommends that the SOM conduct a review of the undergraduate programs' existing core and electives requirements in order to determine if the course work lacks key advanced concepts and topics and/or is too generalized in content and focus. The SOM's goal in revising the curriculum should be to equip the students with professional skill sets regarded by employers as desirable.

AACSB accreditation. The SOM continues to prepare for AACSB accreditation. Although accreditation may not be as important to prospective undergraduates as to graduate students, it may be a significant factor in the matriculation decisions of top undergraduates and their parents. This situation is related, in part, to the shortage of academically qualified, full-time faculty

Classroom functionality and equipment incompatibility. There have been numerous complaints regarding poor classroom functionality such as inadequate size, poor acoustics and ineffective seating designs. In addition to outmoded facilities, a need exists for equipment that is compatible with rapidly developing teaching technology and is readily available to instructors.

Poor "brand name" recognition. The SOM is not generally considered a "recruiting school of choice" by a vast number of Dallas-based companies. In addition, relatively little consistent, quality effort has been expended to "place" our students in meaningful positions that draw the attention of significant employers to the SOM. However, this is somewhat mitigated in part by the large number of students who already have full-time jobs.

Faculty preferences. The majority of the SOM's tenure track faculty tend to prefer graduate education because it is more closely related to research than is the undergraduate program. This is a natural outgrowth of the development of UTD outlined above. In addition, the System Load report assigns greater weight to graduate courses. Consequently, an important segment of the faculty are not fervent champions of undergraduate education.

Varsity sports and campus life. UTD does not and probably will never field a varsity team in any of the three major college sports. In addition, it has a large element of upper-division students living at home, married, employed full-time, etc., although the typical student is evolving away from these criteria. This is decidedly not the profile of a traditional undergraduate program.

Opportunities

There are significant opportunities available to the SOM to improve and enrich the undergraduate programs.

Lack of specific identity. The undergraduate programs are not widely associated with one particular area of expertise, i.e., marketing, MIS, tax, managerial accounting, etc. Not "pigeonholed," the undergraduate programs may be focused to fit the SOM's strategic direction. The types of degrees, concentrations, and specialty courses demanded by the marketplace can be carefully assessed and addressed without jeopardizing the SOM's standing and reputation.

Geographic location. As mentioned above, the geographic proximity of UTD to multinational corporation headquarters affords excellent opportunities for placing graduates. Thus, the SOM must develop and nurture a strong relationship with this business community and aggressively seek out permanent as well as internship/coop positions for students desiring these opportunities. Internship and coops provide students with valuable educational and professional experience, and the SOM should actively seek such positions from the Metroplex business community, in conjunction with the internship/coop office at UTD. (See Appendix 3 for a specific discussion of the internship/coop program at UTD.) Furthermore, the proximity of professional

workplaces engenders an excellent potential student pool, as many of the surrounding corporate entities offer tuition-reimbursement programs or matching funds to employees seeking to further their education.

Information technology (IT) integration. Since today's business environment demands current, cutting-edge knowledge of computer information systems from college graduates, the SOM must successfully incorporate and integrate these concepts and skills into the classroom. IT is a viable direction for the SOM - we simply build on the technological image of UTD and exploit our proximity to the numerous high-tech companies.

Honors program. The SOM has established an honors program, Collegium V, which it actively promotes via recruiting. Such a program will enrich the academic environment, and the business community could perceive this quite favorably. In effect, the honors program will be to the undergraduate programs as the Cohort MBA is to the graduate programs. Not only would the undergraduate programs reach a higher intellectual plateau, but the honors program would also serve to attract top students from not only the Metroplex, but throughout Texas and the Southwest.

Distance learning. With the advent of technological advances in distance learning, the SOM could take advantage of this phenomenon and incorporate its use into the undergraduate programs for prospective students lacking easy access to the UTD campus at prescribed date/times. The SOM could promote asynchronous learning modes which will inure to the benefit of the community. Experience gained by our faculty in this mode at the undergraduate level can benefit our educational delivery of graduate and executive courses/programs.

Cooperative programs. The SOM has implemented cooperative programs involving sequential admission in conjunction with the Dallas and Collin County Community College Districts. Such programs guarantee admission to UTD if certain criteria are met by these Community Colleges' students, and thus promote UTD as the upper-division school of choice in the Metroplex area among the various community college populations.

Threats

There are several threats to the success of the undergraduate programs; many of these, however, may be turned to the SOM's advantage.

Other entities' programs. Other schools and universities in the Dallas areas have positioned satellite campuses and classrooms in the Richardson/Plano area to attract students who would otherwise attend UTD. The emphasis has been primarily in graduate/executive education, but the undergraduate programs could become more prominent targets. Our best defense is an offense spearheaded by an IT thrust.

Emphasis on MBA program. With the apparent continuing preference of employers for MBA-degreed employees and the resulting expansion/focus of the SOM on the MBA

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program, many faculty perceive that the undergraduate program ranks secondarily in importance and does not hold the attention of the SOM. The SOM must counter this “second fiddle” perception and refocus attention on its commitment to the undergraduate programs. Clearly, faculty members of quality prefer to invest their scarcest resource, i.e., time, in “flagship” activities. In fact, our reward system may reinforce this perception.

Innovative use of technology. Because other institutions of higher education are implementing non-traditional uses of technology into their academic programs, the SOM must be prepared to do the same, such as the use of satellite classrooms and campuses discussed above.

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Attachment 1. Survey Statistics

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Attachment 2. Comparison with Other Undergraduate Programs

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Attachment 3. Customer and Service Focus Issues

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Attachment 4. Break-even Analysis

APPENDIX C Master's Programs Subcommittee Report

Deena Andrus, MBA Student and Teaching Assistant
Paul Gaddis, Faculty, Organizations, Strategy, and International Management
Steve Guisinger, Faculty, Organizations, Strategy, and International Management
Richard Harrison, Faculty, Organizations, Strategy, and International Management
Gary Horton, School of Management Advising
Gil Hurley, Advisory Council, EDS
Joakim Kalvenes, Faculty, MIS
G. Kalyanaram, Chair and Faculty, Marketing
C. Konstans, Faculty, Accounting
Chad Nehrt, Faculty, Organizations, Strategy, and International Management
Dale Osborne, Faculty, Economics

APPENDIX D Executive Programs Subcommittee Report

Jack Brittain, Faculty, Organizations, Strategy, and International Management
Robert Chereck, Advisory Council, Wells Fargo Bank
Steve Guisinge, Faculty, Organizations, Strategy, and International Management
Bill Harmon, Advisory Council, Perot Systems
G. Kalyanaram, Faculty, Marketing
Ray Lutz, Decision Sciences
John McCracken, Faculty, Finance
Larry Merville, Faculty, Finance
Marvin Newell, Advisory Council, McKinsey & Company
David Springate, Chair and Associate Dean for Executive Education

Executive Summary

The proposed mission of executive education for the School includes providing degree and non-degree programs driven by customer service for companies/individuals in the region and programs in cooperative distance learning. A recommended key mission component is the development of institutional and corporate relationships by providing value to the School's

partners. Helping to raise resources, organizational learning in the School of Management, and faculty development are also proposed mission components.

It is recommended that the School's Executive Education be organized as a Strategic Education Unit, that it be selective in its offerings, and that these be driven by the needs of key institutional and corporate partners. We must deliver value as capabilities are transferred. Offerings should be either customized or focused public programs. An opportunistic approach to targeted/niche programs is recommended. A background discussion of other possible approaches is presented.

The report discusses the evolution of competition in the non-degree executive education market, examples of competitors activities, and the School's first effort in the non-degree area. It then quickly examines the Executive MBA degree market, specialized degree programs, and in-house MBA programs. A more detailed evaluation of the School's existing three executive degree programs and of the International Oil and Gas Financial Management program and the MBNA Corporate MBA program completes the report. Some recommendations for change and new directions are included.

Recommendations

Mission of Executive Education

- A. To provide both executive education degree and non-degree programs driven by customer service. This includes programs that serve the continuing education needs of companies/individuals in the North Texas region and programs incorporating distance learning.
- B. To develop and maintain key institutional and corporate relationships by providing sufficient value to these partners as we transform capabilities.
- C. To provide organizational learning to the School concerning needs in pedagogy, management education and program innovation so this learning may be reflected in all our programs.
- D. To foster faculty development through interaction with executives.
- E. To help raise resources to enhance the educational efforts of the School.

Arrangements and Choices to Carry Out Mission

- A. Executive Education be organized as a Strategic Educational Unit within the School with its own budget, staff capabilities and coordinating mechanisms.

- B. Executive Education be selective in its offerings. It should build from serving the needs of the key institutional and corporate partners of the School. Relationships must be managed to accomplish this. Offerings should be either customized or focused public programs.
- C. Executive Education should leverage the serving of partners' needs to help the wider community with targeted/niche programs.
- D. Program entrepreneurs be encouraged from within the faculty. Our efforts should be opportunistic and move with all deliberate speed. Our efforts should develop value propositions and follow through.
- E. Program choices and program development be made in accordance with the mission recognizing that not all programs will advance all components of the mission of Executive Education.
- F. Executive Education meet the same high standards as currently maintained by the University for its resident student population.
- G. Aggressive targeted marketing and market research be used.
- H. Programs that do not reach performance targets not be maintained.
- I. Program surpluses be used to support the School in accordance with established policies. Such policies to include support for the linking of client needs and faculty research.

Discussion

1. Competition and Markets for Non-Degree Programs

In schools that are traditional providers of executive education there has been explosive growth over the last ten years in executive education efforts toward both non-degree and customized programs. At the same time, the number of schools offering Executive MBA degrees (a frequent start in executive education) has doubled to about 110.

Stated more completely, Executive MBA programs have grown in number, especially in the eighties and nineties. Meanwhile, non-degree executive education has come of age. What began as principally an activity built around general management programs offered by certain universities has evolved into an activity that:

- a. Has increasingly attracted non-university competitors such as Arthur Andersen and the Center for Creative Leadership in North Carolina.

- b. Increasingly is built around more profitable, focused programs that are shorter, industry specific, and not at a beginning level, i.e. introducing a function. Such courses as Financial Management for Non-Financial Managers have become low-price commodities.
- c. Is moving toward in-company customized programs. It is becoming evident that sending two to three people to a program is ineffective in leading to real corporate change. A critical mass of people/attendees trying to change is often required to bring this about.
- d. Is increasingly built around partnerships with customer corporations. The line between research, consulting, and corporate education is becoming blurred. There is recognition that both individuals and corporate systems need to be more effective. Nortel is the best local example of a company looking for university/corporate partnerships.
- e. Is a significant part of the budget of many schools active in executive education.

<u>School</u>	<u>Executive Education as Percent of School Revenue</u>	<u>Customized Programs as Percent of Executive Education Revenue</u>
Duke	31%	47%
Northwestern	29%	28%
Michigan	31%	20%
INSEAD	52%	n/a

Such schools have experienced consistent growth in customized programs' revenues as a percent of the total executive education revenue.

Other aspects of the market that continue to evolve include selection and support:

- 1. Most participants in executive education programs are self-elected or selected by the boss. The H.R. Department is the main selector in less than 20% of enrollments. Increasingly managers must select themselves and generate the required support.
- 2. There is growing support for targeted individuals who have been identified as important to their organizations. On the other hand, support for education is becoming harder to get for some other individuals. A case for value - creation must be made in order to complete the sale.

At present, this executive education market is estimated to be in the \$3-4 billion per year range nationally. The potential appeals of this segment of the market to the School include money, university visibility, faculty contact with executives, and educational service to important constituencies/partners.

2. Examples of Competitors' Non-Degree Activities

The above trends are illustrated in the non-degree activities of a sample of nine potential competitors.

- a. Stanford
Offers four general programs and ten specialized programs of one week duration. Two of these specialized programs are new. Stanford has one of the highest prices per week of instruction, about \$5000.
- b. Harvard
Has shown accelerated interest in focused programs that emphasize organizational learning as well as individual learning. This move started in the seventies. Some workshops are offered in addition to courses. In the last several years has moved to offer company-specific programs.
- c. Ashridge (U.K.)
The dean sees the dividing line between consultants and management education becoming increasingly blurred. "Whether you are developing managers or organizations doesn't matter -- companies are trying to do both."
- d. IMD (Switzerland)
There has been growth over ten years to ten focused programs. Historically one general program was offered.
- e. SMU
Recent growth has been in certificate programs where students spend twelve weeks working in one area on a part-time basis (Marketing Program 60/year, Finance 30/year). The Cox School offers 21 one or two day courses per quarter (five per month) on various topics.
- f. UT Austin
Specialized in three areas:
 - Technology
 - Oil and Gas
 - Mexico and Latin AmericaIn terms of programs, the Graduate School offers multi-company, industry specific, and custom programs (a number for Texas Instruments). Most programs take three to five days.
- g. University of Toronto
Four focused programs, one general. Also offers in-house programs.
- h. Virginia
Offers open enrollment programs, in-house customized programs, and arranges consortium partnerships which contract for programs. There are two general management programs of six weeks and two weeks duration. The 22 focused

programs are of five day duration and attract about 1400 people a year. Tuition for public programs is about \$4500 per week.

- i. Thunderbird (AGSIM)
Offers executive programs with duration of one week. Specializes in international offerings and oil and gas industry. Also offers custom designed seminars and training programs through Thunderbird Management Center.

3. Non-Degree Programs at UTDallas

The only program operational at UTDallas is the Advanced International Program in Oil and Gas Financial Management. This program attracts approximately 50 people, from abroad, to a four-week program in May. It has been administered historically by the Southwest Legal Foundation. To this point, the program has not been integrated with other School of Management activities and is run by the Center for International Accounting Development. Further details are given later in this report.

4. Executive MBA Programs

The number of EMBA programs nationally is growing at about 10% per year. There are currently 110 members of the EMBA Council, a good measure of the number of programs. Programs compete on school quality/reputation, structure/delivery modes, features, and price. In Dallas-Fort Worth, UTDallas has the number of competitors (SMU, Baylor) we might reasonably expect. Atlanta has three programs, Houston has three (Texas A & M has just announced a Houston program).

The appeal of Executive MBA programs to schools is that they can serve as a flagship program while satisfying at least some of the objectives outlined for non-degree programs. While relatively easier to mount and profitable, they do not have the economic potential of specialized programs.

The Executive MBA degree was pioneered by University of Chicago. To this decade, there has not been much apparent differentiation in scope or subject matter. Definite trends and segmentation are now emerging.

1. While some programs are becoming heavily international and/or geared to international participants, all schools deal with the issues of internationalizing courses, international exposure/location, and internationalizing the participants. While Duke's Global Executive MBA is one reference point, there are many approaches.
2. Some are becoming much more computer intensive than others. While most participants have computers, some curricula call for more usage than others. The use

of distance learning and groupware also continues to push outward the standard of required capability.

3. Some programs are being restructured to be more thematic and more integrated cross-functionally. University of Tennessee at Knoxville and USC are examples.
4. Considerable segmentation and a movement to specialized executive degrees is now apparent. Thunderbird offers an international management degree, NYU offers one in financial services, Tulane has health care management, UTDallas offers ODCM, MIMS, etc. Specialized degrees, in general, command a higher market price and offer market distinctiveness.

UTDallas is competitive with its EMBA program. Later sections of this report will give more details and outline direction for improvement.

5. In House MBA Programs/Consortium Programs

A niche market has emerged in this area. Some companies, looking for productivity improvements, educational benefits, and cost economies have opted to sponsor in house programs (alone or in consortium with others). The return of such programs includes relationship building with client companies and relatively modest financial returns after faculty compensation. The School of Management has recently started a Corporate MBA Program at MBNA Inc. A review follows later in this report.

6. Specialized Degree Programs

As mentioned, these are becoming more popular as university offerings. We can expect more to come on stream. At present, there are relatively few competitors to ODCM and MIMS. The Organization Development and Change Management program has few national competitors nationally (Pepperdine, Bowling Green, Case Western, and American University are the only programs that can claim a national draw). By the same token, the market is thinner and the program appeals to fewer sponsoring companies. Later sections give a more complete review and offer suggestions for beneficial changes.

MIMS has several competitors although no other program is structured exactly as this program is. Importantly, it has no local competitors and is, in fact, the only flex-time program with a specialization in international management. As such it has considerable potential for itself and to serve as a pilot for other School programs using distance learning technology. A long distance MBA program is a distinct possible follow-on program. A more complete review and suggestions follow.

7. Possible School of Management Approaches to Executive Education

Scope. Table D1 lists six possible approaches for the School. Approaches I and II are too ambitious for the School. Both entail a very broad range of programs. A broad regional approach (III) is exemplified by both SMU and UT Austin. To some extent such an approach capitalizes on each School's name and the necessity to be seen to have a broad line of "products".. At some point, this positioning may be appropriate for the School, but not now.

The subcommittee recommends a targeted niche and, essentially, regional approach to executive education (IV). A lesser, minimal effort (V and VI) will not meet the aims of executive education. The School can, however, identify needs where it has strong capabilities and attempt to capitalize on partners' needs/selected market niches.

Table D1. Possible School of Management Approaches to Executive Education

	I. Very Broad Range of Programs	II. Broad Range of Programs	III. Broad Region	IV. Targeted Niches, Regional	V. Very Limited	VI. No Programs
<i>Example</i>	Harvard Business School	Duke Virginia Michigan	SMU Claremont UT-Austin	Purdue	Carnegie- Mellon Baylor	Texas A&M
<i>Scope</i>	Int'l. Programs, Publishing CD-ROMs	Executive Programs, Degree/Non- Degree Int'l. Executive	Executive Programs Degree/ Non- Degree Certificates Short Programs Speakers	One International Program	One Program (EMBA or 6 weeks)	None
<i>Audience</i>	World Business Community	World Education Market	Regional Educational Market	Specialized (can be at a distance)	Specialized	
<i>Basis for Selling</i>	Reputation	Reputation	Reputation & Content	Content	Reputation or Content	
<i>Absolute Needs</i>	1. Huge Faculty 2. Finances 3. Reputation	1. Record to Build From 2. Faculty Size 3. Skills	1. Faculty Size 2. Skills 3. Name Recognition	1. Identified Needs 2. Strong Capabilities 3. Promotion Advertising	Sufficient Capability	Looking to Start
<i>What School Gets</i>	1. Recognition 2. Prestige 3. Money	1. Recognition 2. Prestige 3. Money	1. Recognition 2. Prestige 3. Money	1. Support for Programs (\$); 2. Test Bed for New Programs, Approaches	Limited Payoff	
<i>UTD Match</i>	No	No	Future	Yes	Yes	No
<i>Priority</i>			2	1		
<i>Needs/ Issues</i>			1. Large Faculty 2. Support From Program Office. 3. Dedicated, Organized Staff 4. Sufficient History	1. Encouragement of Entrepreneurs 2. Controls, Coordination for Programs 3. Good Choice New Programs, Old Programs 4. Develop Launching Partners 5. Excellent Back Office Support		

To select the correct programs, however, and deliver them has implications. We will need to encourage program champions, choose programs well, and control programs sufficiently to stop supporting them when necessary. To select programs well, in turn, and promote them successfully leads to the need for corporate partners.

Importantly the approach the School should take is treat this non-degree area of operation as a business. The ability to choose instructors, to develop curriculum, and to fully respond rapidly to market needs is critical if financial goals are to be met. Staff capabilities and coordinating mechanisms need to be put in place.

Unifying Themes in Executive Education. As programs evolve in executive education, the School can profitably use a unifying theme. So far our (degree) programs carry the theme of change and managing for change. This has served us well so far. As the School's mission is more closely articulated, a more effective unifying theme for executive education should be identified and made public. The School needs a message that resonates across programs. It also will allow faculty to say, "Yes, we do that well."

Review of Existing Programs

Executive MBA Program

The definition of success for the Executive MBA Program:

- Respond strongly to local corporate needs for general management education while being a program geared to Managing for Change .
- Serve as a program development arm and experimentation bed for the School.
- Provide returns to the faculty and School in terms of opportunities to teach, remuneration and research support opportunities.
- Be successfully administered.

How well the Executive MBA Program has met these needs can be assessed with the following indicators.

a) Numbers of Executive Students vs. Price

A strong program has the ability to increase enrollment over time for a fixed price or the ability to charge more for the same program over time. The record of the EMBA Program in this regard shows continuous improvement.

	Class of 94	Class of 95	Class of 96	Class of 97	Class of 98
Number of Students	25	25	32	30	35
Total Program Price	\$24,000	\$24,000	\$24,000	\$27,000	\$30,000

The fact that we have been able to successfully implement a 25% program price increase over the last two years while increasing enrollment by 40% over three years indicates both the program's responsiveness to local needs in its curriculum and success in administering the program.

b) Market Area and Market Share

The EMBA Program has expanded its geographic reach this year with its first student living in San Antonio. To this point, all students lived in the Dallas/Fort Worth area.

Our market share of the Dallas/Fort Worth EMBA market has increased over the last three years (see below). We are perceived as being more competitive within the EMBA market place. SMU remains the prime competition.

	Class of 94	Class of 95	Class of 96	Class of 97	Class of 98
UTD % of Market (UTD, Baylor, SMU)	33•	25	26	27	30
• <i>No Baylor Program</i>					

c) Visibility of Program

A successful program attracts more public interest. Growing visibility is also exhibited when a program becomes more selective or attracts its students with relatively less effort. The broad picture shows the EMBA Program has become more visible.

	Class of 94	Class of 95	Class of 96	Class of 97	Class of 98
Mailings to Individuals	376	584	384	458	596
Mailings per enrolled Student	15.0	23.4	12.0	15.3	17.0
No. of Interviews with Director	58	102	83	93	96
Interviews per enrolled Student	3.5	4.1	2.6	3.1	2.7

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That the EMBA Program is becoming more visible is also shown below in that the program is attracting more non-Advisory Council students over time.

	Number of Students	Proportion from Advisory Council companies
Class of 94	25	56%
Class of 95	25	32%
Class of 96	32	19%
Class of 97	30	13%
Class of 98	35	14%

d) Quality of Candidates

As the program has grown in size and visibility over the last five years, the indicators of student quality have stabilized and are now increasingly favorable. Two indicators of better quality are average UGPA and the ratio of graduates to number starting the program.

	Class of 94	Class of 95	Class of 96	Class of 97	Class of 98
Average UGPA	3.1	2.9	2.9	2.9	3.1
Graduates as percent of Number Starting	.72	.88	.88	.90•	n/a

• *To Second Year*

While the average age at entry has remained at 37 or 38, we are getting a steady stream of professionally qualified applicants.

	Proportion of Class with title President, VP, GM or Owner	Proportion of Class with title Director	Total
Class of 94	20%	20%	40%
Class of 95	12%	28%	40%
Class of 96	22%	16%	38%
Class of 97	17%	23%	40%
Class of 98	24%	15%	39%

e) Capabilities/Quality of Graduates

That the program is succeeding in its aims of educating for general management is reflected in new jobs and new responsibilities since graduation. The number of significant job responsibility changes/company changes for the two relevant classes is evidence.

	Class of 94	Class of 95
No. of Graduates	18	22
No. of significant job changes	9	8
Ratio	50%	36%

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Five members of the Class of 1994 have recently been promoted to Vice President at national-level corporations. Two are employed by Texas Instruments, one by Pepsico, one by Trammell Crow and one by Nine West.

Executive MBA Program as Experimentation Bed and Program Development Arm

Success has been achieved in the following areas:

a. Breadth of EMBA Program

To the academic heart and core of the Program have been added certain program elements to enrich it, to distinguish it and to make it a true executive MBA program.

- i) Team teaching. This has been implemented in six courses. The challenges addressed include bringing in diverse faculty viewpoints and cohesion.
- ii) Outside-school faculty. In both team courses (e.g. Social and Political Environments of Business) and solo taught courses (e.g. Statistics), faculty from outside the School of Management have been used successfully. The cross-disciplinary aims of the University for the program are being met.
- iii) Two three-day residential retreats for each EMBA class. Each retreat involves outside speakers, panels, class activities and sessions to increase professional competence.
- iv) Three two-day communications modules for each EMBA class including modules on the press and interviewing, on professional oral presentations and on mind mapping.
- v) Pre-program calculus sessions (5 morning sessions) and pre-program computer sessions (3 evenings). These have been consistently offered to incoming EMBA students.
- vi) An international trip to bring out the Managing for Change theme operating in different areas of the world. A trip was organized for each of the three graduating classes.
- vii) A writing coach has recently been hired to assist in developing critical communications skills.
- viii) A series of speakers at lunch time from the outside has been made part of the program. Each class welcomes roughly six speakers a semester. The aim of the series is to broaden our classes and better show the activities of the Metroplex. Dr. Ron Anderson, CEO of Parkland Hospital, and Mr. Gene Leeson of INDRESCO and the Advisory Council, are examples of our guests.

Some activities have been adopted by other school programs (retreat in ODCM, communications offerings in the Cohort MBA, international trip in the MIMS program).

b. Revisions to Program/Integration/Local Needs

Some real progress has been achieved here. Specifically, the faculty has tried to integrate, to some extent, its activities by area or across areas. Over time this should eventually lead to changes in other programs of the School of Management.

- i) A new Action Learning Project based in the first year Global Economy course and the Leadership in Organizations course has been managed for three years. The participation of Vought Aircraft Company two years ago started these projects.
- ii) Further, team based field projects have become an important part of the curriculum, especially in Management Science Practice, and the Managing Change course. Some of these projects have been publicized by the *Wall Street Journal*. Others have achieved demonstrated results for companies such as Oryx Energy and Vought.
- iii) The Organizational Behavior area rearranged its course sequence in the program to a new 4x2 credit hour sequence.
- iv) The Corporate Venture Development course (entrepreneurship in corporations) was added into the second year curriculum.
- v) Fourth semester courses became integrated in the sense of smooth transition. The Management Science Practices course was tied to Power and Political Influences course in a seamless fashion. In the same manner, the first year Finance course was used to develop a base used later in Management Science Practices to teach decision trees and Monte Carlo simulation.

c. Derivative Programs

One of the SOM's purposes is to use the EMBA program as a base from which to develop other executive programs. This is underway.

- i) The Organization Development and Change Management Program (ODCM) came into being, in large part, as a result of having the EMBA program in place. While the format was modified and an organizational concentration chosen, the essential framework and initial attraction was the EMBA program. Texas Instruments needed something further adapted to its needs. The ODCM program has proved financially successful. It is administered and supported by the Executive Education office.
- ii) In a similar vein, the fact that the EMBA program exists has allowed the SOM to move into the flex-time Master of International Management program (MIMS). It is sold as a contrast to the EMBA program. Fee structure is the

same on a credit-hour basis. The Executive Programs Office also administers registration, admitting, budgeting, grades, graduation, etc.

- iii) Recently the SOM began its first corporate in-house MBA program at MBNA Corporation. The program is a natural outgrowth of our public executive programs. The three year program is expected to produce revenue of approximately \$445,000.
- iv) A non-degree administration program for physicians and health professionals is in active discussions with Parkland Hospital at this time.
- v) Preliminary discussions are underway with the School of Engineering regarding a jointly offered executive program in the Management of Technology. Such a program would draw heavily on the structure, course work and administrative capabilities of the EMBA Program Office.
- vi) Further, a more thorough field investigation of possible program offerings for medical professionals is underway.

Returns to Faculty and School

a. Funds at Completion of Program

At the end of the first three classes the following balances existed:

Class of 94	\$-0-
Class of 95	\$12,000
Class of 96	\$120,000

The first ODCM program had approximately \$80,000 left in available funds.

b. Reimbursement to Faculty for Teaching in Program

Year	EMBA Program	All Executive Programs
1992-93	\$21,000	\$21,000
1993-94	\$21,000	\$21,000
1994-95	\$43,200	\$56,450
1995-96	\$129,600	\$215,400
1996-97 (est.)	\$129,600	\$276,600

c. Research Grants Supported by Executive Programs

Approximately \$80,000 used to support to faculty research programs in the summer of 1996, was allocated from executive education accounts.

Administrative Capability Developed

The Executive Programs office has grown from a half-time secretary to include two full-time classified positions (an administrative assistant and a secretary III). The office also handles the budgets, administration and spending for executive programs. Marketing programs and recruiting programs remains a program director's responsibility.

Organization Development and Change Management Program

The School of Management initiated the Organization Development and Change Management Program in partnership with the Texas Instruments Semiconductor Training and Organizational Effectiveness (SCT&OE) group in the summer of 1984. Key T.I. executives felt that T.I. needed to enhance its ability to manage change using internal resources and pledged to support the program with significant enrollments for three years and with ongoing enrollments indefinitely as new individuals joined the firm and were identified as key contributors to T.I.'s ongoing change efforts. When the program was founded, both UTD and T.I. agreed that the program should have the following features:

- Diverse participation by individuals with extensive experience in change management (it would be an executive program including individuals with many different kinds of experience).
- A broad representation of companies.
- A schedule that accommodates the travel that is typical of individuals that work as change experts. The agreed format was all day Thursday-Saturday once a month (this ended up also accommodating individuals who relocated out of town during the program).

The ODCM curriculum is structured to parallel the action research model, which is the integrating methodology for the program. The action research approach emphasizes applied research leading to a confirmed diagnosis and effective change intervention, an approach that puts a premium on basic research skills, including direct observation, interviewing, instrument construction and organizational analysis. The curriculum is structured to emphasize both content and skill elements.

Students completing the ODCM portion of the program are eligible for a M.S. in Management and Administrative Sciences with a concentration in Organizations and Strategy if they complete the basic business core. The core requirements are:

Accounting (3 hours)
Business Economics (2 hours)
Management Information Systems (2 hours)
Operations Research (2 hours)
Statistics (3 hours)

The business core was offered on a once a month basis for the first cohort after they had completed the ODCM portion of the program. The second cohort will be taking the business core on a flextime basis in conjunction with the students in the MIMS program.

Program Statistics. The first ODCM cohort arrived at UTD in September 1994 and completed their degree requirements in 1996. The second cohort began their studies in September 1995 and will complete the ODCM concentration in December 1996. Those that need to take the business core (individuals with MBAs do not need to take the business core) will finish their degrees in 1997.

The individuals participating in the program have had the following backgrounds

	First Cohort	Second Cohort	Third Cohort
Engineering	8	2	3
Organization Development	5	5	3
Training	4	7	4
Human Resources	3	1	2
Accounting/Finance			2

The following organizations were represented in the cohorts:

	First Cohort	Second Cohort	Third Cohort
T.I. Semiconductors	8	2	4
T.I. Systems Group	3	5	
T.I. Information Systems	3	4	
T.I. Corporate	2		2
EDS	2	3	2
Nortel	1		
Northrop-Grumman	1		
Texas Employment Commission		1	
UTD		1	
Xerox		1	
Raytheon-T.I.			3
Cigna Insurance			1
Banc One			1
Self sponsored			1

While the program has continued to attract individuals with diverse backgrounds, the enrollments are still heavily T.I. We are currently working to diversify the base of sponsoring organizations. UTD has done no advertising to date for the ODCM program, and the only promotional activities have been sponsorship of the DFW OD Network chapter, an organization with an active membership of approximately 100 individuals split 50-50 between external consulting and internal change management.

The completion rate and fees for the ODCM Program are:

	1996 Class	1997 Class	1998 Class
Started Program	20	15	14
Completed ODCM (24 hours)	20	13	
Enrolled in Core (12 hours)	19	11	
Completed M.S. (36 hours)	19	13	
Program Fee	\$16,800	\$19,200	\$19,200
Core Fee	\$5,600	\$4,800	\$4,800
Total Program \$22,400	\$24,000	\$24,000	
Percent EMBA Fees (75%)	93%	89%	80%

The ODCM Program has been a money maker for the School. The total program fees were initially very high compared to the EMBA Program, but this discrepancy has declined as the EMBA Program fees have been raised closer to market rates.

MIMS Program

³ Four individuals had signed up for the second ODCM Cohort, but they lost their funding when EDS merged its Management Consulting Services with A.T. Kearney two weeks before the program start date.

The MIMS Program has two principal goals:

- To serve the needs of executives who wish a graduate management education, but do not have a travel or work schedule that permits regular classroom attendance.
- To serve as a platform for the development of distance learning technologies that will have applicability in other parts of the School and the University.

The MIMS Program has the following strengths:

- 1) At present, it is the only program listed in Yahoo under the designation *international management distance learning*.
- 2) Market Area: The MIMS Program is the first School of Management program to draw regular attendance from out of the country. The 1996 MIMS Program has one student in Mexico and the 1997 Program has one student in Indonesia.
- 3) Visibility: The MIMS Program has received nation attention in the *Chronicle of Higher Education*.
- 4) Quality of candidates: The Class of 96 includes representatives from the following companies:

Texas Instruments
American Airlines
Alcatel
Dun and Bradstreet
Caltex Petroleum

The Class of 97 includes individuals from the following companies:

Nortel
Eli Lilly
Arco
Thomas Cook Financial Services
Texas Instruments
Raytheon E-Systems

The MIMS Program has already had an impact on other programs offered by the School, including the following:

- 1) A new core course program using flextime procedures.
- 2) The EMBA implementation of the MIMS groupware technology.
- 3) Emerging interest in developing a Global MBA based on MIMS methodology.

The MBNA Corporate MBA Program

A six semester in-house corporate MBA program was started for MBNA Corporation in September. The full 48 hour program is to be delivered over three years. The initial enrollment was 25 students. All are fully supported by the company financially. Regular admission standards and grading standards apply in the program. Faculty in the program are compensated on an overload basis.

The financial contribution of the program to the School is expected to be \$300,000 over the three years.

The program offers teaching opportunities for faculty and its financial contribution. It also comes at an opportunity cost in that there are limits to faculty time spent in executive education. The program can be pictured as tying up the executive education efforts of roughly one full time faculty member. As a partial alleviation, it is expected that occasional part time instructors will be used.

International Oil and Gas Financial Management Program

This program has been offered since 1979 by the Center for International Accounting Development. Its formal name is the Advanced International Program in Oil and Gas Financial Management. Attendees include mid-level and senior managers from companies outside the U.S. Cost for each of the 50 participants in the four week program is relatively low, \$4000 with a discount given if more than one person attends from an organization. A certificate is awarded.

The program is successful in that 950 oil and gas executives from 68 countries have participated and that faculty have been recruited (other than Prof. Enthoven) from the business community. The program finances its own staff. The residual after expenses is roughly \$75,000 a year. Until this year the program was administered by the Southwest Legal Foundation.

Faculty Requirements

The figure of \$2,000,000 annually has been put forward as a target for a net contribution to the School after expenses.

The following scenario is used as a base.

	<u>Enrollments</u>	<u>Anticipated Net Revenue After Expenses</u>
EMBA Program	55 students	\$400,000
MIMS Program	55 students	400,000
ODCM Program	35 students	250,000

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MBNA Corporate MBA	25 students	100,000
Oil & Gas Financial Mgmt.		100,000
		<hr/>
		\$1,250,000

These programs can be covered with existing faculty. The extra \$750,000 will require extra faculty. If each faculty member can work ten days a year and generate \$100,000 net (\$1000/day/pp x 10 x .50 ratio of expenses x 20 people), the School would require 8 new participating faculty members to meet requirements.

APPENDIX E

Ph.D. Programs Subcommittee Report

Frank Bass, Chair and Faculty, Marketing
Chuck Best, Advisory Council, Crestwood Asset Management
George Brody, Advisory Council, Nortel
R. Chandrasekaran, Faculty, Decision Sciences
Shun Chen Niu, Faculty, Decision Sciences
Ted Day, Faculty, Finance
Tarun Dewan, Ph.D. Student, Marketing
Richard Harrison, Faculty, Organizations, Strategy, and International Management
B.P.S. Murthi, Faculty, Marketing
Ram Rao, Faculty, Marketing
Rex Sebastian, Advisory Council

The Subcommittee reaffirmed the Ph.D. Program mission statement as part of the strategic planning process:

The School's mission in doctoral education is to prepare students for research positions in universities, research institutes, and industry in the United States and foreign countries and to keep its doctoral programs positioned on the frontiers of management research.

The School of Management offers two Ph.D. degrees, the Ph.D. in Management Science and Ph.D. in International Management Studies. The Management Science Ph.D. Program includes possible concentrations in Decision Sciences, Finance, Marketing, and Organizations, Strategy and International Management (OSIM). The International Management Studies Ph.D. has only one concentration, Organizations, Strategy, and International Management. Note that students in the OSIM area can elect either the Management Science or International Management Studies options. The difference in degree title depends on the research methods sequence taken. The research methods requirements for each degree are:

Management Science Ph.D. Research Methods Core Requirements

Required (6 hours):

OPRE 6330 Probability Models in Operations Research or STAT 5351
MAS 5352 Statistics for Management Science or STAT 5352

Additional 12 hours from the following list:

MECO 6312 Business Forecasting or STAT 6347
MECO 6320 Introduction to Econometrics
MECO 7320 Advanced Econometrics

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MIS 6326 Data Base Management Systems
MKT7312/7412 Research Applications in Marketing or STAT 6348 or 7331
MAS 7320 Optimization Methods
MAS 8340 Seminar: Operations Research
OPRE 6320 Numerical Analysis and Data Structures
OB 7303 Research Methodology in Behavioral Sciences

OB 7306 Macro-Organizational Empirical Investigation
OPRE 6331 Stochastic Models in Operations Research or STAT 6329
OPRE 6311 Game Theory in Operations Research
OPRE 7312 Optimization
OPRE 7311 Mathematical Programming II

International Management Studies Research Methods Requirements

Required (6 hours):

OB 7303 Research Design
OB 7306 Macro-Organizational Empirical Investigation

Additional 12 hours⁴ from the following list:

POEC 5313 Policy Data Analysis I
or STAT 5311 Applied Statistics for Management Sciences I
POEC 5316 Policy Data Analysis II
or STAT 5312 Applied Statistics for Management Sciences II
POEC 5331 Econometrics
POEC 7359 Econometric Techniques
STAT 6347 Applied Time Series Analysis
STAT 6348 Applied Multivariate Analysis

The formal requirements of the doctoral programs are at least two years of course work (emphasizing doctoral seminars), a comprehensive examination at the end of the course work, the preparation and defense of a dissertation proposal, and the preparation and oral defense of a doctoral dissertation based on original research in the student's area of specialization. Students also assist in teaching duties and work with faculty members on research projects throughout their programs, and teach undergraduate courses only after they have passed the comprehensive examination.

The concentrations within the doctoral program have been revised in the last seven years. In the Management Science area, Finance and Managerial Economics pooled their efforts to deliver a joint doctoral program, and a Decision Sciences concentration was formed to provide scale for students interested in operations research, operations management, and MIS.

The OSIM Ph.D. Program began in 1989. Prior to this time, there were small programs in each of three component areas (Organizational Behavior, Strategy, and International Management). Based on a review of these programs in 1988 and a discussion of the future of these areas, the faculty agree to merge these three programs and emphasize international management issues across all areas of study. As a result, all the students graduating from the OSIM program tend to do work with an international slant, even if they are in areas such as organization theory (e.g., a recent dissertation examined legitimation strategies for firms

⁴ Program of study developed in consultation with Ph.D. Advisor takes prior training, research interests, and course availability into account. Other advanced methods seminars covering qualitative and comparative case methods may be applied to this requirement where appropriate and if offered.

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entering foreign markets) or strategy (e.g., a recent dissertation studied foreign firm strategies for entering the U.S. market). With rare exceptions, students in the OSIM Program elect the IMS Ph.D. option. UTD has one of a handful of Ph.D. programs in International Management

Table E1. Enrollment and Test Scores

	Ph.D. Enrollments and Test Scores by Year						
	F90	F91	F92	F93	F94	F95	F96
Management Science	72	60	64	55	53	39	33
International Mgmt. Studies	7	15	18	15	11	10	18
Total Students	79	75	82	70	64	49	51
Ph.D. Credit Hours	615	667	659	734	490	392	395
Average GMAT, all students	599	599	609	614	627	632	632

in the country, and this has been an advantage in recruiting strong Ph.D. students into the OSIM Program. Average test scores, enrollments, and initial placements have improved dramatically for the OSIM area since the formation of this combined program in 1989 (see Table E1).

Graduates and Placement

The School of Management has graduated 139 Ph.D.'s. Of these, 112 were placed in academic positions. The placement record is uneven by area, but the placement in Marketing has been excellent. Since 1986, 9 students have been placed in "top twenty" schools with graduates going to Stanford, Northwestern, Cornell, Yale, Carnegie Mellon, University of Virginia, and Washington University (St. Louis).

Competition

We are competing in Marketing with the top nationally recognized schools for students. In other areas we compete primarily with other schools in the area and the state. As indicated in Table E2, TA compensation at UT/Dallas is low in comparison with many of the better nationally prominent business schools. And if the School of Management is to truly compete and consistently attract the best students, TA compensation has to be competitive.

Assessment

The quality of the Ph.D. program is excellent in Marketing and reasonably good overall. Standardized test scores have consistently improved, but credit hours and numbers of students enrolled have declined dramatically. The challenge for the future will be to further increase the quality of the students while arresting the decline in the numbers of students.

The Future

Surveys by the Research Committee of the Association of Directors of Doctoral Programs in Business and by the AACSB indicate that the academic market for Ph.D.'s in Business will

Table E2: TA Compensation at Comparison Schools

School	TA Compensation (total 12 months)	Dallas Equivalent (cost of living adjusted)
Cornell University	15,000	16,671
Duke University	14,700	15,592
UCLA	18,667	14,314
Northwestern University	15,000	13,938
Indiana University at Bloomington	12,000	13,842
University of Rochester	12,000	12,047
Purdue University at West Lafayette	10,800	11,958
Univ. of Maryland, College Park	10,265	11,335
Stanford University	13,200	11,215
University of Texas at Dallas⁵	12,000	9,500
New York University	17,300	9,455
University of California at Berkeley	12,000	7,913
University of Texas at Arlington ⁶	9,000	
Texas A&M University ⁷	10,800	
Average of 1996 compensation	13,052	12,315

continue to be tight for the next 5 years or so. Although some top schools have downsized their Ph.D. programs and doctoral enrollments have declined slightly, the ratio of Ph.D. graduates to new positions is greater than 2 to 1. The number of high school graduates is expected to rise over the next several years, but it will take some time for this to impact M.B.A. enrollments with consequent impact on Ph.D. demand. Although the total demand for Ph.D.s in Business is not likely to grow in the near term, the leading schools continue to be in the market and complaints are often heard about the quality of the supply of graduates. "There will always be a shortage of excellent Ph.D.s." UT Dallas has demonstrated an ability

⁵ At UTD, The TA compensation does not cover in-state tuition. The "Dallas Equivalent" for UTD is thus the actual compensation minus \$2,500 for annual tuition assuming all TA's receive TPEG.

⁶ 1994 numbers.

⁷ 1994 numbers.

to compete effectively in the past in this very narrow market segment on a selective basis and, in the long run, successful positioning with respect to this segment will be an effective way to enhance the reputation of the School of Management.

Excellence in the Ph.D. Programs

Excellence in the Ph.D. program can be achieved only with excellent faculty and with excellent students. Outstanding prospective Ph.D. students often choose the school at which they study on the basis of the research reputations of individual faculty members. Additional faculty with national reputations will be required in the School of Management. This will require additional chairs in the School.

Costs and Revenues

The formula funding (per J. Wiorkowski) for Ph.D. students is \$419.83 per credit hour. Average credit hours per Ph.D. student are currently 16.12. Assuming 60 Ph.D. students, revenues from the formula would be \$406,060. If 75% of the students have TA positions at the current rate the costs are \$405,000. Thus, revenues and TA costs are approximately balanced. Faculty salaries allocated to the Ph.D. program comprise a substantial part of the true costs of delivering the program. If 6 courses per semester are offered (core course plus seminars) and average salary costs per course are \$20,000, faculty salaries would be \$240,000. This cost figure does not include costs of dissertation supervision, individual study courses, and Ph.D. related activities of the faculty. However one looks at it the Ph.D. program, from a financial standpoint it does not produce revenues that offset the costs of delivering the program. Hence, the program must be justified on the basis of other benefits delivered to the School of Management and the University.

Benefit

Both the School and the University are positioned as research-oriented enterprises. The Ph.D. program and the research activities in the School are strongly related. In addition to the fact that the Ph.D. program stimulates and enhances the research activities of the faculty, the existence of the Ph.D. program substantially enhances the quality of faculty that can be attracted to the School and thus contributes to the quality of teaching in the M.B.A. program and other professional programs in the School. Students evaluating Executive M.B.A. programs often seek information about the reputations of the faculty in the School. The reputations are determined by the scholarly and research activities of the faculty. The existence of the Ph.D. program, therefore, contributes to the competitive positioning of the Executive programs of the School.

The School of Management at UT/Dallas has the only quality Ph.D. program among business schools in the Dallas area, and only one other business school in the state can rival the

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reputation of UT/Dallas' Ph.D. Program and the placement of its Ph.D. graduates. From this perspective, the Ph.D. Program is clearly of strategic importance for the School.

APPENDIX F

External Relations Subcommittee Report

Frank Bass, Faculty, Marketing
Ka Cotter, Advisory Council, The Staubach Company
Paul Gaddis, Faculty, Organizations, Strategy, and International Management
Steve Guisinger, Organizations, Strategy, and International Management
G. Kalyanaram, Faculty, Marketing
C. Konstans, Faculty, Accounting
Stan Liebowitz, Assoc Dean
Diane McNulty, Chair, Assoc. Dean
Hasan Pirkul, Dean
Robert Slater, Advisory Council
Allan Tomlinson, Advisory Council, Consultant
Frank Winnert, Advisory Council, Consultant

MISSION: To manage and coordinate external relationships of The School of Management for the purposes of improving corporate/community profile, public relations, development/fundraising, alumni relations, and the development of further corporate strategic alliances based on the identified strengths and opportunities open to the School of Management.

To manage and coordinate internal School of Management activities as they relate to School, corporate and community identity.

ISSUES: The School of Management is facing the following issues which need to be resolved:

- Constantly changing external/business environment;
- Changing external Management School environment (competition between schools for state dollars and between corporate universities is increasing);
- International opportunities for programs are increasing;
- Changing corporate giving profiles (value back is considered);
- Expectation that the School of Management must develop a community identity;

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- Emphasizing the unique characteristics of the School of Management's programs and faculty;
- Maximization of geographic location to high-tech corporate community;
- Improve School of Management's "unknown" reputation.

- STRATEGY:** To achieve the mission as identified above, the School will need to concentrate on the development of an external affairs component of administration, concentrating in the following major areas with the following emphasis:
- Establish reputation as “New Generation Business School”;
 - Become “hiring list” School for major corporations;
 - Improve faculty visibility in business community;
 - Raise external research profile of School;
 - Increase the dialogue between universities and practicing managers struggling to keep up with knowledge development;
 - Establish the business school as the window on university research for firms.

By concentrating in the following major areas, the School can achieve its external relations goals.

- I. Development** - fundraising, maintenance of donor relationships, prospect development; and implementation of President’s Leadership Circle on Management Education, and its relationship maintenance, as well as Advisory Council coordination.

Strategic Objective - Resources:

- Increase state revenues through an enrollment increase;
- Increase in discretionary funds from donations and endowment;
- Increase in executive program funds;
- Expanded external research funding.

Opportunities for Achievement:

- To monitor, maintain and develop existing corporate giving relationships;
- To identify donor prospects/potential President’s Leadership Circle advisors; potential Advisory Council members;
- To define programs attractive to potential companies;
- To coordinate relationships with President’s Leadership Circle and insure their benefits (i.e., programs, continuing education seminars, employee retraining) are proceeding;
- To begin to develop alumni giving opportunities/program;
- To research prospects for large donors, possibly School of Management name designee;
- To research prospects for foundation grants and/or annual contributions.

II. Corporate Strategic Alliances - development and maintenance of corporate relationships, identification of new prospects, management of corporate strategic partners benefits, and development and maintenance of a community agenda.

Strategic Objective - Business Partner Satisfaction:

- Increase involvement in School events and activities;
- Expanded hiring on campus;
- More extensive involvement on key advisory committees;
- More extensive engagement with student projects;
- Continuing presence in Executive Education;
- More joint development of continuing education.

Opportunities for Achievement - Corporate Strategic Alliances:

- To develop and maintain corporate relationships to identify new prospects, to manage corporate strategic partners benefits;
- To develop and maintain a community agenda;
- To develop alliances with progressive firms that value university contact;
- To increase knowledge-based companies that need latest research, cutting edge employee knowledge and skills;
- To continue to stress student quality;
- To continue program innovations; flexibility;
- To build joint programs between business school and engineering/ sciences that will appeal to the business community;
- To stress Executive Education that will continue to evolve as a partnership between the firm and the university with greater emphasis on integrated learning;
- To identify UTD alumni local, key roles in growing companies;
- To develop close, mutually beneficial relationships with 10-12 companies designated as President's Leadership Circle on Management Education strategic partners;
- To develop and continue to maintain relationships with companies represented by Advising Council by stressing commitment through:
 - guest lecturing
 - School of Management committee advising
 - fundraising
 - providing sources of internship/coops
 - initiating on-campus interviewing
 - recruiting students for executive and cohort programs
 - serving as mentors
 - hiring our graduates
 - corporate consulting projects done by students
 - references to school speeches

- To identify and nurture relationships with the Dallas business community by designating a community agenda and/or project (make a business/educational contribution to the community);
- To initiate and develop relationships with nonprofit business organizations and international organizations by participating, or organizations and international organizations by participating, or organizing business/community seminars, short programs, etc.
 - Communities Foundation of Texas
 - Center for Nonprofit Management

III. Alumni Relations - identification and development of School of Management Alumni, initiation of relationships with alumni (events programs), and coordination of alumni involvement in fundraising and corporate strategic alliance development. Alumni relationships are virtually nonexistent (approximately 8,000 School of Management graduates to date).

Strategic Objective - Alumni Pride:

- Expansion in alumni participation/leadership in UTD Alumni Association;
- Creation of Executive Education Alumni Group;
- Greater alumni involvement in School events and activities;
- Increase alumni donations to School;
- Greater alumni participation in placement;
- Greater alumni leadership in an internship program.

Opportunities for Achievement:

- To identify School of Management alumni from all levels of programs;
- To initiate a School alumni organization;
- To build relationships with alumni base and the companies they represent;
- To provide avenues for these alumni to participate in program, event administration;
- To coordinate the alumni and initiate a fundraising campaign Alumni Partners in Progress (APIP).

IV. Public Relations - publications, promotional activities, development of a corporate identity for School of Management, special events coordination, recruitment, development of an external relations staff, media strategy.

Strategic Objective - School Visibility:

- Define and market School of Management's competitive advantage by concentrating on the above three areas.

Opportunities for Achievement - To Build and Promote Identified Strengths:

- To initiate the publications of a biannual School of Management publication;
- To develop and implement a public relations plan for the School;
- To position and promote the School and its programs in the business community and the community at large;
- To develop a “corporate” identity for the School which can be used and played out in all publications, etc.;
- To coordinate the publication of individual program materials;
- To organize special events for students, alumni, faculty and corporate strategic partners;
- To develop a community identity, business/education program, or project to enhance the School’s standing;
- To coordinate recruitment efforts and materials;
- To advertise and promote events, programs in existence that have relevance and are applicable to high-tech business community;
- To promote strategic business partnerships;
- To promote high quality students at all levels;
- To develop a small staff (1 person for now) to assist in the writing and coordination of public relations efforts.

IMPLEMENTATION PLAN FOR 1996-1997

- Establish SOM Visibility/Corporate Identity

SPRING/SUMMER 1997:

- Develop Corporate identity
- Publish SOM magazine
- Coordinate SOM identity throughout programs
- Promote Corporate strategic alliances
- Promote a SOM event for alumni

Measure of success will be publication of magazine; scheduling of alumni event and number who turn out.

- Establish President’s Leadership Circle

SPRING/SUMMER 1997:

- | | |
|--|-------|
| Announce 1st member | March |
| Announce actual PLC with 3-5 companies | May |
| Begin implementation with first alliance | March |

Measure of success will be committing 5 companies; success already begun with AT&T \$50,000 commitment for 1997.

- **Develop and Maintain Advisory Council**

SPRING/SUMMER 1997:

- Expand membership to include a representative of each PLC company
- Kick off Partners in Progress - Goal is \$150,000 unrestricted funds
- Continue Advisory Council involvement in program development matters

Measure of success will be reaching \$150,000+ in unrestricted funds through PIP; increasing membership in Advisory Council.

- **Establish PR Functions in SOM**

SPRING/SUMMER 1997:

- Hire a PR assistant (done February)
- Develop a PR/Media plan
- Create a Corporate identity for SOM
- Implement marketing plan
- Initiate meetings with key media contacts
- Coordinate all SOM brochures, etc.

Measure of success will be creation of brochures and implementation of a media plan.

- **Develop SOM Strategic Alliances**

SPRING/SUMMER 1997:

- Begin the establishment of a SOM alumni association
- Develop foundation relationships
- Establish PLC
- Continue to enhance Advisory Council alliances

Measure of success will be member of committed alumni forming a group; number of committed business partners.

- **Establish SOM Development Agenda**

SPRING/SUMMER 1997:

- Initiate special programs (February)
- Participate in community business efforts (February through Summer)
 - Implement Ford Program interns
- Planned recognition of business/individual contributions to SOM-late Spring
- Recognize SOM Corporate partners
- Recognize/award student alumni efforts
 - Dean's List
 - Establish a business honorary fraternity
 - Develop PR for individual achievements
- Develop/implement a community agenda through participation in the Ford Program.

Measure of success will be implementation of 2-3 special events; 10-20 interns involved in the Ford Program; event recognizing business partners; recognizing as many students as qualify for honors awards; establish a business honorary fraternity.

• Establish SOM Alumni Group

SPRING/SUMMER 1997:

- Develop alumni list
 - in process
- Activate core alumni
 - in process
- Develop alumni involvement; commitment by a core group of 20+ to form an alumni association; the generation of memos (at any level) from this group.

• Establish Alumni Giving Opportunities

SPRING/SUMMER 1997:

- Completion of a first list identifying alumni.
- Increasing alumni involvement in SOM activities.
- Increasing alumni support for PIP campaign.
- Identification of a core group (20+) of alumni to advance the establishment of an Alumni Association.

Measures of success will be a reliable alumni list; implementation of an activity for alumni; cultivation of alumni financial support; creation of the alumni association.

- **Coordination, Monitoring, Planning of Promotional Activities for Programs in the SOM**

SPRING/SUMMER 1997:

- Create a consistent identity for each program that corresponds to that of SOM.
- Create/develop recruitment materials
- Coordinate publications, ads, brochures

Measure of success is a new logo and color theme for SOM and its programs; since some programs currently do not have brochures, the creation of one represents a success.

- **Establishment of a Foundation Agenda**

SPRING/SUMMER 1997:

- Apply for small grants from several foundations
- Apply for CF Grant
- Research other grant sources
- Apply for grants

Success will be measured by the receipt of a grant for SOM programs.

- **Prospect for Large Donors; SOM Name Designee**

SPRING/SUMMER 1997:

- Through PIP and alumni development, potential donors can be identified; however, this is actually 1-2 years down the road.

Attachment 1. Advisory Council Bylaws

I. PURPOSES AND OBJECTIVES

- A. To consult with and advise the faculty and Dean of the School of Management on issues and opportunities regarding the role of the school within the UTD environment and the community; to provide a business and community perspective on the curriculum in the context of the school's role; and to assist in other education-business related activities such as business research, business conferences, and management training.
- B. To provide an additional avenue of direct liaison between faculty and the business community for the purpose of promoting understanding, cooperation, and mutual gain through such activities as consulting arrangements, involving faculty members in practical business problems, arranging for guest lecturers from industry and bringing students in direct contact with business executives and their ideas.
- C. To provide an opportunity for exchange of points of view between the business community and the academician, as it relates to business education and business research.
- D. To support the objectives of the School of Management through active fundraising and development activities and through advice relative to utilization of funds gathered by such activities.

II. MEMBERSHIP

- A. Number: 42
- B. Nomination:
 - 1. Members shall be nominated by the Dean of the School of Management, who shall be assisted by the standing Membership Committee. Each present member of the Advisory Council shall be requested to submit the names of prospective members to the Dean and the Membership Committee on a periodic basis. The nominations of the Dean will be forwarded to the President of The University of Texas at Dallas for appointment and to the Board of Regents for a final confirmation. Members of the Advisory Council shall be approved by the Board of Regents of The University of Texas system.
 - 2. Council memberships shall not be limited to graduates of The University of Texas at Dallas nor to residents of the State of Texas.

3. Senior Active Membership may be accorded, by election of the Executive Committee, to those members who have served the Council faithfully and with distinction for three years or longer. Senior Active Members will continue to serve indefinitely, without reelection, while enjoying all of the privileges and responsibilities of full membership. Senior Active Members are encouraged to participate in Council affairs and meetings.
4. Outgoing Chairs of the Advisory Council will be appointed to Senior Active Membership status by the Executive Committee at the end of their current term. Former Chairs may alternatively choose to become Senior Active Members or to continue to serve in a fully active role.

C. Terms:

Members are appointed to staggered three-year terms. Council members are eligible to serve consecutive terms, subject to renomination by the Dean, after consultation with the Membership Committee, and approval of the Board of Regents. Interim members may be appointed for less than three-year terms to fill vacancies created by resignations and terminations.

D. Membership Objectives:

Appointments shall be made so that the membership maintains broad representation of professional and business skills and background among the membership.

E. Terminations:

The achievement of the purposes and objectives of the Advisory Council depends on the active participation of the members in Council meetings, as well as in the work of the committees to which they may be appointed. In the event a member is unable to actively fulfill his or her responsibilities, the Chair of the Advisory Council shall consult with that member to determine his or her continuing interest and ability to serve.

III. MAJOR ACTIVITIES OF MEMBERS

- A. Assist in the attainment of the purposes and objectives of the Advisory Council as set forth above.
- B. Lend their endorsement to the School of Management by having their names appear on School of Management and Advisory Council letterheads when appropriate.
- C. Actively support the fundraising and development activities of the Council.

- D. Actively attend the meetings of the Advisory Council and participate in the work of the committees as necessary.

IV. ORGANIZATIONS AND PROCEDURES

A. Voting:

1. The Dean of the School of Management shall be an ex-officio but voting member of the Council.
2. The Director of Development shall be an ex-officio member of the Council without vote.
3. Members of the faculty of the School of Management may be appointed by the Dean at his discretion to serve as ex-officio members of the Council without vote.
4. At the discretion of the Dean, one or two student members may be appointed as ex-officio members of the Council without vote.

- B. The Membership Committee will propose, and the Council will elect, a Chair and Vice-Chair, each with a two-year term, with the Vice-Chair automatically moving to the position of Chair upon expiration of the term of office of the current Chair.

- C. The UTD School of Management Advisory Council will be organized into seven standing committees: Executive, Membership, Curriculum, Technology, Public Relations, International, and Development, together, of course, with other committees which may be necessary from time to time.

- D. The Executive Committee shall be composed of the Chair, the Vice Chair, the Dean of the School of Management, and the Chairs of the other standing committees of the Advisory Council. The day-to-day functions and work of the Council will be accomplished by the Executive Committee. It will establish or dissolve the various select committees of the Council as may be necessary and will appoint members of the Council to these committees. The Executive Committee will coordinate the work and activities of the individual committees, suggest programs, institute procedural and organizational changes, formulate the agenda of the meetings of the Council and coordinate all financial affairs.

- E. The Council shall meet at least three times each academic year, preferably in the fall, winter and spring.

- F. Opportunities for Council members and the faculty to become acquainted shall be arranged periodically by the Dean.

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- G. Minutes of the meetings shall be published and made available to the faculty and Council membership.

SCHOOL OF MANAGEMENT ADVISORY COUNCIL STANDING COMMITTEES

Curriculum Committee
Development Committee
Executive Programs Committee
International Committee
Membership Committee
Public Relations Committee
Technology Committee

Curriculum Committee

Purpose:

To assist the Dean of the School of Management in developing and/or creating existing courses, new courses, degree programs and other special programs to enhance the quality of the educational program and/or the educational experience of the students.

Responsibilities:

Assist the Dean of the School of Management on curriculum issues and other special program issues.

At least annually, meet to receive a report of the Dean of the School of Management regarding the status of the current curriculum and special programs, which report should contain information such as the following:

- An evaluation of enrollment in elective courses (Is it growing?

Is it popular with certain segments of the marketplace?).

- Significant changes in courses or program requirements.
- A report on the participation of mentors.

Provide mentors for the faculty or for special courses identified by the Dean of the School of Management. The mentors would either be members of the Committee, or the Committee identifying and facilitating the identification of mentors from other members of the Advisory Committee or from the Dallas Metropolitan area business community.

- Mentors would make themselves available to faculty by telephone and in person as would be mutually arranged.
- Mentors may speak to one class a year, as would be feasible with the mentor's schedule.

Advise the Membership Committee of prospective new members to the Curriculum Committee who will enhance that Committee's scope and effectiveness.

Development Committee

Purpose:

To develop, organize and oversee the fund-raising activities of the School of Management Advisory Council for the UTD Management School Foundation for the purposes of (a) providing financial stability to the UTD School of Management and (b) enhancing the School's ability to recruit and retain the highest possible caliber of faculty and graduate students.

Responsibilities:

Guiding and directing the annual *Partners in Progress* campaign for the purpose of raising unrestricted gift support for The UTD Management School Foundation.

Encouraging the participation of each member of the Advisory Council in the annual *Partners in Progress* campaign by either giving or raising \$5,000.

Seeking to gain a broad base of funding support from the business community.

Identifying and cultivating major gift prospects.

Advising the Membership Committee of prospective new members to the Development Committee who will enhance the committee's scope and effectiveness.

Executive Committee

Purpose:

To be composed of the Chair and the Vice Chair of the Advisory Council, the Dean of the School of Management and the Chair of the other standing Committees of the Advisory Council; to accomplish the day-to-day functions and work of the Advisory Council.

Responsibilities:

Establish or dissolve various select Committees of the Advisory Council as may be necessary.

Appoint members of the Advisory Council to the various Committees.

Coordinate the work and activities of the individual Committees.

Suggest programs.

Institute procedural and organizational changes.

Formulate the agenda of the meetings of the Advisory Council.

Coordinate all financial affairs of the Advisory Council.

International Committee

Purpose:

To assist the International Department of the School of Management in the continuing development of the Department. The Committee membership is intended to be an effective cross section of Dallas Metropolitan area businesses involved in international trade and services, so as to be a knowledgeable pool from which the School can draw assistance.

Responsibilities:

Assist the department head on issues regarding current international events for use in the School courses.

Advise on the content of the international training based on the business being conducted by the Committee members.

Assist the department head in finding guest lecturers with the best knowledge in the chosen area.

Advise the Membership Committee of prospective new members to the International Committee who will enhance that Committee's scope and effectiveness.

Meet on a regular basis, at least annually, with the head of the department, to be briefed on the department's activities and to prepare the agendas of efforts needed by the Committee members to accomplish the responsibilities stated above.

Membership Committee

Purpose:

To assist the Dean of the School of Management in building membership and providing the leadership succession of the Advisory Council.

Responsibilities:

Assist the Dean of the School of Management in selecting and nominating members for the Advisory Council, who will actively participate to help the Council achieve its purposes and objectives.

Periodically, and at least annually, analyze Advisory Council membership with the goal of obtaining broad representation on the Council by professional and business sectors in the Dallas metropolitan area.

Solicit names of prospective members from current Advisory Council members.

Assist the Dean of the School of Management with regard to renominating members of the Advisory Council.

In consultation with the Dean of the School of Management, propose for election by the Advisory Council, members of the Advisory Council to serve, each for a two-year term,

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as Chair and Vice-Chair of the Council, with the Vice-Chair automatically moving to the position of Chair upon expiration of the term of office of the current Chair.

Identify new members to the Membership Committee who will enhance that Committee's scope and effectiveness.

Public Relations Committee

Purpose:

To increase awareness of the unique characteristics of the School of Management and continually to promote student, curriculum and faculty matters to local and regional general public and business audiences.

Responsibilities:

Assist in the development of a strategic marketing plan for the School of Management emphasizing:

- Primary selling product — students
- Secondary selling product — quality of faculty and faculty external activities and resources of the school for special projects.
- Resource to Business — industry in the Southwest region.
- International resources with special emphasis on Pacific Rim.

Increase public awareness of the School of Management in order to recruit students.

Increase corporate awareness of School of Management in order to encourage business involvement and giving.

Develop individual brochures focusing on School of Management's attributes:

- Alumni — testimonials of graduates
- Faculty — unique backgrounds

Increase relationship and contact between the Dallas Metropolitan business community, city officials and the faculty and Dean.

- Creation of faculty task forces on city and regional needs.

Assist in development of timely news releases on student and faculty matters.

Promote individual School of Management board members.

Promote the activities of the Dean.

Advise on School of Management advertising.

Technology Committee

Purpose:

To assist the Dean of the School of Management in evaluating and advising with regard to the technical needs of the School, such evaluation to encompass hardware, software and system needs for instructional purposes, and to advise the Dean on the technical programs needed by graduates of the school.

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Responsibilities:

Meet with the Dean and his invitees, at least annually, to receive a briefing on the School's technical plans.

Assist the School in a plan for its growth in technical capability.

Form an agenda of action by the Committee members to assist the Dean in the School's technical training and growth plans.

Work with the Chairperson/Vice Chairperson of the Advisory Council and the Dean on coordination as well as synergy of roles between the Technology Committee and the Engineering Management task force.

Advise the Membership Committee of prospective new members to the Technical Committee who will enhance that Committee's scope and effectiveness.

Current Tasks:

Identify key speakers on Technology Management of interest to SOM and Engineering Faculty.

Investigate the University's plan for technology growth and how it relates to the needs of the School of Management.

Attachment 2. Strategic Alliance Proposal for Corporations in the Dallas–Fort Worth Metroplex

BACKGROUND

Located in North Dallas/Richardson, the heart of the Telecom Corridor, The University of Texas at Dallas School of Management is a valuable resource to Dallas area corporations. The School of Management, as a part of a metropolitan teaching and research university, has all the attributes of a national business school:

- Offers advanced academic and professional degree programs to both full-time and part-time undergraduate, masters and Ph.D. students;
- Has excellent Executive Education Programs focusing on “Managing for Change”;
- Has highly published faculty with national reputations; and
- Is supported by the high tech corporate community and a diversified Advisory Council.

The university has excellent students. Our incoming freshman class is tied with U.T. Austin for the top position among all public universities in Texas (based on SAT scores and numbers of students in the top 10% of their high school graduating class; almost half of our students are in the top 5 percent of their graduating class). We also have excellent graduate students. Our Cohort MBA class is one of the best in the nation (based on average GMAT scores, they are one of the ten best classes in the nation). Our part-time MBA program also attracts very high quality students. During the 1995-96 academic year, we granted 299 undergraduate degrees, 343 masters degrees, and 8 Ph.D. degrees. In all, the School of Management granted 42% of the degrees conferred by the University last year. The majority of our masters students are part-time students employed in area businesses.

STRATEGIC DIRECTION

UTD is a young school, only going back 30 years. The School of Management has only been in existence for two decades. Primarily because of its age, despite its excellent students and quality programs, it has not achieved the level of national recognition it deserves. Given the dynamics of the business education today, we believe that we can only achieve this visibility by exploiting our competitive advantage over other institutions. We believe that our location and our roots in a high quality research institute stressing excellence represent two areas of strategic advantage for us. We are surrounded by major corporations that recruit nationally and internationally. For this reason, we recognize that in addition to new hires, our major value to these corporations is in providing the very best education to meet the continuing educational needs of their employees. We intend to further develop this part of the School's activities through establishing strategic alliances with local corporations. In doing so, we believe that we will create programs (including full-time programs) that meet the needs of

the industry in the ever changing global economy. It is also our belief that this commitment will propel us to be a model business school and lead to high national visibility.

We propose to assemble a group of up to 10 high ranking executive officers of corporations to form the President's Leadership Circle for Management Education. This group will advise the President and the Provost of the University and the Dean of the School of Management regarding the strategic direction of the School. Membership in this Circle ensures that the corporations have access to the highest levels of the University administration. The University will develop mutually beneficial strategic alliances with the corporations represented in this group.

PRESIDENT'S LEADERSHIP CIRCLE FOR MANAGEMENT EDUCATION

Composition: Up to 10 high ranking executive officers of corporations or well-placed, high profile community leaders; President of The University of Texas at Dallas; Provost of The University of Texas at Dallas; Dean of the School of Management (SOM); and Chair of the School of Management Advisory Council.

Purpose: Through a commitment to join the President's Leadership Circle, members and their corporations would become strategic partners of the University and the School of Management with the express purpose of supporting the School's efforts to create excellent programs that are responsive to the needs of our strategic partners in particular and industry in general. It is through these programs that the School will enhance its national visibility.

Expectations from Members: Each member agrees to participate in defining the strategic direction of the School, to provide advice on our new initiatives, to appoint a person to serve on the School's Advisory Council. This person will have the primary responsibility of developing and operationalizing activities that will form the basis of a strategic alliance between the company and the School. Members of the Leadership Circle will also help in creating and implementing a development plan that will help raise funds to support the School's drive to become a nationally recognized model business school. Member corporations will make a \$50,000/year (for 4 years) investment in the School. The School agrees to provide tangible value equal to this amount to each corporation, primarily through executive education/continuing education activities.

Why Should a Company/Individual Participate: A common complaint among executives has been that business schools have not been responsive to the rapidly changing global economy and the resulting needs of their industries. Many large corporations have established and are establishing "universities" of their own often at major expense. Yet the state-supported universities should and could provide most of the educational needs of the corporations at a reasonable cost. SOM is committed to developing programs in partnership with these firms in the Circle that are indeed responsive to the needs of industry. We are also

committed to a continuous improvement philosophy which will enable us to respond quickly to changing needs. In fact, we want to use this commitment as a strategic tool to position the School as a national model. We believe that as a result of this approach, SOM will have excellent programs and be ranked nationally.

Benefits to the Corporations Participating in the Circle:

- 1) Provides member corporations with an opportunity to participate in the development of a model business school and to influence business education nationally. This will result in immediate benefits to member corporations, one of which is highly qualified graduates. More importantly, it will also address the continuing education needs of employees of these corporations.
- 2) Provides member corporations the ability to send executives to participate in our Executive Education programs at 50% discount (up to \$50,000 value). Currently, we offer the following executive education degree programs: Executive MBA, Master of Science in Organizational Design and Change Management (ODCM), and Master of Arts in International Management Studies (MIMS). We also offer custom designed short courses.
- 3) Provides member corporations the opportunity to work with student teams led by selected faculty with the goal of using specific problems of corporate interest as class projects.
- 4) Provides member corporations access to continuing education/executive education programs custom designed to meet their needs.
- 5) Provides member corporations an annual reception to introduce them to community leaders, friends of the University, students and faculty.
- 6) Provides member corporation executives the opportunity to enrich students' education through presentations and guest lectures.
- 7) Provides member corporations access to the UT-Dallas Library, and the resources of graduate students as well as faculty for research projects.
- 8) Member corporations will be prominently featured in all SOM publications as sponsors/partners of the School.

Implementation Details

Meetings of the President's Leadership Circle will be held twice yearly. The Chair of the SOM Advisory Council will act as liaison between the Council and this Circle. The Advisory Council will continue in their current capacity where they are closely involved in advising

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the SOM in program development and other matters. They will also continue with the Partners In Progress annual campaign. If so desired, member corporations will be given the opportunity to appoint a representative to the Advisory Council.

APPENDIX G

Steering Committee Reports

Frank Bass, Faculty, Marketing
Jack Brittain, Faculty, Organizations, Strategy, and International Management
Sydney Hicks, Advisory Council, Sterling Commerce
Max Hopper, Advisory Council
G. Kalyanaram, Faculty, Marketing
Connie Konstans, Faculty, Accounting
Stan Liebowitz, , Faculty and Associate Dean for Academic Affairs
Larry Merville, Faculty, Finance
Diane McNulty, College Master and Associate Dean for External Affairs
Hasan Pirkul, Dean and Chair
David Springate, Faculty and Associate Dean for Executive Education

Table G1. SWOT Analysis

What trends, changes, technologies will shape the School of Management in the next 10 years? What are the School’s strengths and weaknesses when it comes to meeting these challenges?

	Opportunities	Threats
Business Environment	<p>Employment in Telecom Corridor will double</p> <p>Highway 190 will drive technology-based companies to locate in UTD’s backyard</p> <p>Companies in knowledge industries need to run as fast as they can to stay in the same place (demand research, education, university interaction)</p> <p>North Dallas has global companies looking for standard global delivery of customized training that supports company objectives (relationships matter)</p> <p>Increasing out sourcing of business services (increased demand for education; education is strategic advantage for service companies)</p>	<p>Education vs. Training will increasingly be issue for corporate funders (want company-specific training)</p>
Competition	<p>University competition in Southwest U.S. is generally weaker than in other parts of the country</p> <p>Competition will emphasize differentiation, distinctive programs</p>	<p>Competitive reach of universities will increase with internet</p> <p>Universities will locate branches in Telecom Corridor to get students</p> <p>Corporate universities (Motorola U, T.I. Learning Inst.)</p> <p>Competition will emphasize differentiation, distinctive programs</p>

Public Education	<p>SOM will be expected to pay its own way with UTD</p> <p>Challenge of legitimating research as activity to public that regards university as school</p> <p>Change in state funding formula</p>	<p>Public institutions increasingly required to “pay own way” to excellence</p> <p>“Undergraduate experience” will continue to sustain traditional campus programs</p> <p>Change in state funding formula</p>
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	Opportunities	Threats
Students	<p>Computer literacy will be a given, computer will be standard tool</p> <p>Premium on time will increase: education where and when need it</p> <ul style="list-style-type: none"> • foreign students in rapidly expanding economies • professionals with MBA looking for differentiation <p>Expanding demand for higher education as next baby boom hits</p> <ul style="list-style-type: none"> • renewed demand of Ph.D. qualified faculty 	<p>Computer literacy will be a given, computer will be standard tool</p> <p>Students in global companies will be global, look to global competitors for educational needs</p>
Research and Teaching	<p>Increasing emphasis on research–teaching integration to deal with rapidly changing knowledge base (faculty pulled into private research)</p> <p>Increasing public pressure for universities to teach more and research less</p> <p>Knowledge changing rapidly, faculty need continual renewal (opportunity to take leadership, faculty not have time, resources to keep up)</p>	
Partnerships	<p>Increasing dialogue between universities and practicing managers struggling to keep up with knowledge development</p> <p>Increasing demand for coop/internship programs</p> <p>Business school can be window on university research for firms</p> <p>Joint programs between business school and engineering/sciences will appeal to business</p> <p>Executive Education will evolve as a partnership between the firm and the university with greater emphasis on integrated learning</p> <p>UTD alumni local, key roles in growing companies</p>	

	Strengths	Weaknesses
Alumni		Alumni relationships are virtually nonexistent <ul style="list-style-type: none"> • approximately 8,000 SOM graduates
Faculty	Quality compares favorably with big 10 universities Flexible, open-minded; adapt to change “Good teaching” reputation in business community <ul style="list-style-type: none"> • Pragmatic teaching • Knowledgeable faculty Strong teaching by Senior Lecturers Faculty & institution support quality Very few lecturers Faculty composition (Tenure track versus senior lecturers)	Turnover rate of faculty Faculty morale Capabilities do not match program demands Faculty composition (Tenure track versus senior lecturers by curriculum area)
Education value	Affordable tuition, excellent quality	Course offerings, lack of electives for students trying to complete concentrations Poor service to students
High student quality	Good experience Good business reputation	Full-time and part-time balance too heavily with part-timers, keeps recruiters from coming
Location	Ease of access Local community growing, cheaper hire locally	Service to students perceived as poor

	Strengths	Weaknesses
Programs	<p>Executive programs are well regarded</p> <p>Flexibility, convenience of programs</p> <p>Diversity of programs (MA, MS, MBA)</p> <p>Improvement in PhD programs been continuous</p>	<p>UTD not well known, strengths not recognized locally</p> <p>Lack concentrations in undergraduate programs</p> <p>SOM lacks “image” for programs</p> <p>Tenure track participation undergraduate program</p>
UTD/SOM	<p>SOM magnet for donors/relationships</p> <p>SOM magnet for students</p> <ul style="list-style-type: none"> • 48% Masters • 30% Undergrads <p>SOM easy to build</p> <ul style="list-style-type: none"> • Cheap to build (ROI) • Less investment in labs, equipment • Cheaper to support human capital <p>UTD enrollment growth linked to SOM growth</p>	<p>External relationship management</p> <p>Appreciation of people investment versus investment in physical plant</p>
Facilities		<p>Inadequate classroom space</p> <p>Inadequate office space</p> <p>Technology infrastructure poor</p> <p>Constraint in short term</p>
External relationships	<p>Strong business interest in UTD, but this has not been cultivated and developed</p>	<p>Community presence poor</p> <ul style="list-style-type: none"> • general business relationships • community service poor <p>Not handling partnerships well, communicating regularly</p> <ul style="list-style-type: none"> • partners feel UTD not responding to their concerns

Table G2. Strategic Objectives

<p>Quality</p> <ul style="list-style-type: none">• continuous improvement in quality of students, faculty• continuous improvement in program quality as assessed by alumni and employers• recognition of educational quality by corporate recruiters• raise research profile of School• place doctoral students in research universities
<p>Business Partnerships</p> <ul style="list-style-type: none">• increase involvement in School activities, expanded development support• expand hiring, define School as provider of quality employees• increase in research funding from businesses• more extensive engagement with student projects• more joint development of education programs, executive education
<p>Alumni Involvement</p> <ul style="list-style-type: none">• expansion in alumni participation• Executive Education Alumni group• increase alumni donations to School• increase involvement in placement and internships
<p>School Visibility</p> <ul style="list-style-type: none">• expand placement activity, marketing of graduates• increase number and quality of companies hiring at UTD• improve faculty visibility in business community• recognized for excellent executive education• recognized by other business school deans
<p>Resources</p> <ul style="list-style-type: none">• increase state revenues through enrollment increase• increase in discretionary funds from donations and endowment• increase in executive program funds• expand external research funding

Table G3. Strategic Objectives and SWOT Analysis

<i>Strategic Objectives</i>	<i>Opportunities for achievement</i>	<i>Threats to achievement</i>	<i>Strengths supporting achievement</i>	<i>Weaknesses hampering achievement</i>
<p>Quality</p> <ul style="list-style-type: none"> • continuous improvement in quality of students, faculty • continuous improvement in program quality as assessed by alumni and employers • recognition of educational quality by corporate recruiters • raise research profile of School • place doctoral students in research universities 	<p>Ongoing demand for quality faculty</p> <p>Telecom Corridor expansion is businesses interested in research, funding research</p> <p>Strategic partners' support for university research mission</p> <p>Demographic changes will increase demand for faculty</p>	<p>Demographic changes will increase competition for faculty</p> <p>Competition from other schools for quality students and faculty</p> <p>Delay in response to opportunities will allow competition to get entrenched position</p> <p>Worldwide competition for research dollars</p> <p>Change in state funding formula for Ph.D. education</p>	<p>Programs have a reputation for quality in content and teaching</p> <p>Faculty quality, quality of current students</p> <p>Current strategic partners</p> <p>Success trend in current Ph.D. programs</p> <p>Faculty with excellent credentials, important research</p> <p>Faculty values</p>	<p>Availability discretionary funds</p> <p>Number/percent tenure track faculty in certain areas</p> <p>Poor alumni relations</p> <p>Technology infrastructure</p> <p>Perceptions of cost-benefit of Ph.D. training</p>
<p>Business Partnerships</p> <ul style="list-style-type: none"> • increase involvement in School activities, expanded development support • expand hiring, define School as provider of quality employees • increase in research funding • more extensive engagement with student projects • more joint development of education programs, executive education 	<p>Alliances with progressive firms that value university contact</p> <p>Knowledge based companies that need latest research, cutting edge employee knowledge and skills</p> <p>Company demand for global delivery</p> <p>Partnerships in Executive Education</p>	<p>New competitors entering based on prior relationships</p>	<p>Faculty quality, ability to work with business community</p> <p>Excellent educational value</p> <p>Location: very accessible for company employees</p> <p>Successes in Executive Education, executive alumni</p>	<p>Faculty involvement with local business community</p> <p>Service to students, responsiveness to business</p> <p>Lack of "place"; shabby facilities</p> <p>Faculty morale</p> <p>Lack of SOM coordinator for student projects</p>

<i>Strategic Objectives</i>	<i>Opportunities for achievement</i>	<i>Threats to achievement</i>	<i>Strengths supporting achievement</i>	<i>Weaknesses hampering achievement</i>
Alumni Involvement <ul style="list-style-type: none"> • expansion in alumni participation • Executive Education Alumni group • increase alumni donations to School • increase involvement in placement/ internships 	8,000+ SOM alumni	Existing alumni apathy	Educational reputation, strength of faculty Faculty–student projects in Executive Education Current contacts with business community	Current alumni involvement and organization
School Visibility <ul style="list-style-type: none"> • expand placement activity, marketing of graduates • increase number and quality of companies hiring at UTD • improve faculty visibility in business community • recognized for excellent executive education • recognized by other business school deans 	Location: growing international reputation of Telecom Corridor Strategic alliances Alumni success High quality students Future will emphasize differentiation	Competition from other schools, internet delivery Information technologies allow companies to search internationally for recruits Change in state funding that undermines quality of school	Foundation of quality faculty Highly capable students Reputation for quality teaching	Current low visibility Poor alumni organization Enrollments too heavy with part–timers Lack undergraduate concentrations Little community involvement by faculty

<p>Resources</p> <ul style="list-style-type: none"> • increase state revenues through enrollment increase • increase in discretionary funds from donations and endowment • increase in executive program funds • expand external research funding 	<p>Telecom Corridor expansion</p> <p>Second baby boom</p> <p>Change in state funding formula</p> <p>Strategic alliances with business partners</p> <p>Expanding demand for executive programs</p> <p>8,000+ SOM alumni</p>	<p>Competition from other state schools for budget</p> <p>Competition from private schools for donors</p> <p>Change in state funding formula</p>	<p>Faculty quality</p> <p>Faculty willing to adapt to change</p> <p>Excellent educational value</p> <p>SOM high potential</p> <p>UTD faculty as a whole has experience with external funding</p>	<p>Existing alumni relationships</p> <p>Faculty involvement with business community</p> <p>Limited grant writing experience within SOM</p>
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APPENDIX H

SACS Report on Institutional Effectiveness⁸

Background

It is important to examine the current effectiveness of the School of Management in context. The School is in the midst of major changes, many of which are intended to rectify past weaknesses in the area of institutional effectiveness. Two contextual factors are particularly important:

- 1) Dean Pirkul joined the School in July 1996. Since taking over as Dean, he has initiated a major self-study that involves virtually every member of the School's faculty, alumni and student representatives, and SOM Advisory Council members. The level of involvement and depth of the self-study surpasses what was done for the accreditation self-study in 1994.
- 2) The School is currently in the midst of a major strategic planning effort in conjunction with the self-study. The strategic planning effort is likely to result in changes in virtually every aspect of the School's organization and operations, so evaluations of what is are becoming outdated weekly. Significant changes are occurring in every area, including planning, administration, allocation of responsibilities, faculty committees, assessment, and program review and evaluation.

This report documents effectiveness mechanisms that have existed and the changes currently in process.

Formal Assessment: General Orientation

In general, effectiveness tends to be assessed by the School of Management with input measures. For example, the School relies heavily on measures such as standardized test scores at time of admission (SAT & GMAT), prior GPA, and previous work experience in its evaluation of its educational programs, on prestige of school where the Ph.D. was earned in its evaluation of faculty, and on company participation on School boards and advisory bodies as an indicator of community service. These inputs are held to performance standards (e.g., GPA for students, tenure for faculty), but little formal evaluation has occurred in the past in

⁸ Report prepared by Jack Brittain, School of Management, for inclusion in the SACS Institutional Effectiveness Report prepared jointly by George Farkas (Social Sciences), chair of the Institutional Effectiveness Subcommittee, and Richard Mitterer (Geosciences), chair of the Steering Committee.

areas like curriculum, programs, career placement, etc. The School's past operating philosophy has been "get good people and get out of the way."

There is much to recommend this, since it allows good people to achieve without hindering their performance with excessive administration in the case of faculty, and a lot of meaningless hoop jumping for students. But this approach also has meant that systematic reviews of programs were infrequent, change was infrequent and drastic rather than continuous and incremental, and basic information on time to degree, program problems, and curriculum deficiencies were not dealt with in any systematic way. Because of these deficiencies, the School is rapidly implementing procedures and processes that will greatly expand the amount of data on student outcomes and faculty productivity collected by the School. And these data are being used to more thoroughly assess program content and delivery, faculty teaching, and research. All processes are not yet in place, but significant improvements are being implemented.

Research Effectiveness

The School of Management collects annual reports from all faculty. These are required of each faculty member at UTD and capture basic information on research productivity, teaching activities and service. These are turned in every January and form the basis of evaluations for merit raises (which have been infrequent and small). In the past, faculty were given no feedback on their annual performance, other than the amount of their raise, but even this was ambiguous because merit raises have been so small that any information content is swamped by cost-of-living and equity adjustments. Although the Dean's office gives faculty "scores" on research, teaching, and service, these ratings are not shared with faculty and faculty do not know what information is used to assign ratings.

The School also compiles required reports on faculty research productivity, but this information is not used for any effectiveness improvement. In general, the faculty are very firmly embedded in their professional associations and are aware of their relative standing within their area of study.

Feedback policies are in the process of changing. The announced policy that is currently in the process of implementation is a goal-setting process, where each faculty member is asked to define three and one year goals for professional development and contributions, and then is evaluated according to attainment. These goals are set in consultation with the dean to ensure that they are meaningful and constitute genuine contributions to the School.

Teaching Effectiveness

The only consistent source of information on classroom teaching is student course evaluations.

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The faculty of the School do give considerable attention to curriculum matters. The School has undergraduate, master's, doctoral, and executive education program committees that actively monitor courses and curriculum issues. These committees rely on student course evaluations, program director feedback and faculty input. In addition, individual faculty members can make suggestions for program changes. These suggestions are reviewed by the appropriate program committee and then forwarded to the School faculty for final approval.

A great deal of informal evaluation and continuous improvement occurs in the School. This is detailed in the survey findings below.

Service Effectiveness

There is currently no formal mechanism for tracking service contributions, other than the annual faculty report. Changes are being considered in conjunction with the School's strategic planning process, but no policies have been drafted.

Informal Evaluation, Feedback, and Continuous Improvement

Based on an initial survey of school planning and evaluation and a review of school accreditation reports, the SACS Institutional Effectiveness Committee was not able to identify consistent school-level planning and evaluation procedures at UTD. This, however, contradicted the experiences of the members of the Committee, all of whom had participated in various planning, review, and evaluation activities at some point. Based on these experiences, the Committee concluded that much of the review and evaluation that takes place at UTD is in small units, most typically groups of faculty that have a stake in a particular program. These groups of faculty are diligent about monitoring, improving, and updating courses, but there is no formal procedure that specifies exactly how this is supposed to happen. But just because it is not formal does not mean it does not happen.

As evidenced by this report, a wide variety of methods are used to evaluate and update programs. This data collection is not systematic and varies by program, and with good reason. For instance, the School of Management's curriculum includes accounting, which has a standardized test in the CPA Exam that can readily be used to evaluate the Accounting program's performance. But, placement is a much better indicator of performance for the School's Ph.D. programs, which have an explicit goal of training academics. The evidence indicates that evaluation and associated planning is extensive and well adapted to meeting the highly varied needs of the School of Management's diverse programs. And taken as a totality, the informal activities that occur regularly within the School indicate that considerable planning, evaluation, and continuous improvement occurs, it just does not occur formally.

It should also be noted that just because there is extensive informal and ad hoc evaluation and planning also does not mean that the School of Management is doing a thorough job of planning and evaluation. What is ad hoc may or may not be done in a timely manner, and evaluations in response to glaring deficiencies are not generally as effective as evaluations and responses based on defined performance metrics. Furthermore, informal evaluations tend not to be documented, which means there is little institutional memory of prior changes and earlier problems, and without this memory, informal mechanisms are likely to recreate prior problems at some point. This is a deficiency in the School's evaluation and planning processes that has been identified and is being addressed with a strategic planning process initiated by the School's new dean, Hasan Pirkul. This process has defined evaluation processes, specific performance metrics, and the School's governing committees are currently implementing a comprehensive evaluation and planning process.

Data Collection

The data in this report were collected by surveying individuals within the School of Management knowledgeable about program evaluation and planning. While the School of Management has a fairly straightforward degree structure that includes B.S., M.S., MBA, M.A., and Ph.D. degrees, there are a number of specialties within the School that are reflected in “groups” that manage, evaluate, and update curriculum components and a variety of format offerings that function as separate programs in terms of their contact with students and advisory boards. In order to capture the complexity of the evaluation and planning that occurs within this structure, 12 responses were solicited using a standardized matrix of evaluation mechanisms. The following is the break down of respondents:

Frank Bass, Director of Ph.D. Programs for the School.

Jack Brittain, OSIM area Ph.D. advisor responded for the OSIM area, which has the International Management Studies (IMS) Ph.D. Program, a concentration in the Management Science Ph.D. Program, master’s concentrations in organizations studies, strategy, and human resources management, and undergraduate courses in organizational behavior and social and political environment of business.

Jack Brittain, Director of the Organization Development and Change Management (ODCM) Program, an executive program serving change experts sponsored by major corporate employers.

Ted Day, area coordinator for finance, a group that has a Ph.D. concentration in Management Science, a master’s concentration, and undergraduate courses.

Steve Guisinger, program manager for the Master in International Management Studies (MIMS) distance education program and International Management M.A. program (IMMA), a campus based version of the same M.A. program in international management offered through MIMS.

G. Kalyanaram, area coordinator for the marketing area, which has a Ph.D. concentration in Management Science, a master’s concentration, and a course in the undergraduate program.

G. Kalyanaram, program director for the Cohort MBA Program, a special format version of the regular MBA program for full time students that take all their courses together.

Constantine Konstans, area coordinator in Accounting, which has a master’s concentration and undergraduate major.

Ray Lutz, area coordinator in Decision Sciences, a group that includes operations research and MIS and has a Ph.D. concentration in Management Science, a master's concentration, and undergraduate courses.

Diane McNulty, College Master, who responded for the undergraduate program.

David Springate, Associate Dean for Executive Education and director of the Executive MBA Program, a special format MBA delivery that features weekend classes and a cohort structure in which students take all their classes together.

Young Ryu, MIS faculty member that has performed oversight duties for the MIS programs at the Ph.D., master's, and undergraduate levels.

The responses to this survey are summarized in Tables 1-5. Table 1 is a summary table, capturing the results of all the surveys. The letters in Table 1 indicate the use of the evaluation/planning mechanism. The letters indicate:

- U mechanism used for undergraduate program;
- M mechanism used for master's programs;
- E mechanism used for executive programs;
- P mechanism used for Ph.D. program;
- R mechanism used to evaluate faculty research activity.

Detailed information on undergraduate, master's, executive, and Ph.D. programs are compiled in Tables 2-5.

Results

The survey results reported here only capture evaluation and review mechanisms that are informal and decentralized to specific faculty groups and programs. In addition to these informal mechanisms, the School also participates in the UTD annual review process, assesses faculty performance with external inputs in tenure and promotion reviews, and is subject to campus review and evaluation processes that track faculty classroom productivity, assess teaching, monitor educational delivery, and ensure policy compliance.

As expected, there is extensive evaluation and planning taking place across programs and within faculty groups responsible for different curriculum elements. These activities are regular and there is a direct connection between evaluation and program improvement efforts.

Certain mechanisms are used more extensively than others, but some mechanisms are program specific (e.g., Ph.D. dissertation defense). In the course of the survey, it also became apparent that mechanisms for evaluation and planning cannot simply be characterized as input and outcome measures. For instance, faculty publications are used to evaluate faculty

research activity, but the publication record of the faculty is also an indicator of input quality for the School's various programs.

The following feedback and evaluation processes were identified as being in use within the School for planning and program improvement purposes:

Faculty publications are used to capture faculty research activity and as indicators of faculty quality for the School's programs.

Citations of faculty publications are measured as indicators of the influence of faculty research, a measure also used to characterize the quality of the faculty teaching in the School's programs.

Ph.D. student publications are tracked as an indicator of Ph.D. student outcomes and as a measure of research activity.

Research funding is tracked as an indicator of faculty research success and is also a resource measure applied to the School's Ph.D. programs.

Table H1. School of Management Summary

<i>Feedback/evaluation Process</i>	<i>What is evaluated</i>
Faculty Publications	U, M, E, P, R
Research Citations of Faculty Publications	U, M, E, P, R
Ph.D. Student Publications	P, R
Research Funding	P, R
Ph.D. Program Graduates	P, R
Ph.D. Thesis Defense	P
Formal External Program Review	U, M, E, P, R
Advisory Board	U, M, E,
Alumni Feedback	U, M, E, P
Student Feedback	U, M, E, P
Certification Exam	U, M
Standardized exam performance/professional exams	U, M, E, P
Student internships	U, M, E
Graduate school placements	U, M
Core course performance	M, E, P
Capstone course performance	U, M, E
GPA	U, M, E, P
Field course performance	M, E
Graduation rate/attrition rate	M, E, P
Undergraduate honors theses	U
Employer feedback	U, M, E
Employer donations to school	E
Graduate career tracking	M, E, P
Placement	U, M, E, P
Faculty consulting	M, E
Faculty field research	M, E
Exit interviews with graduates	U, M, E, P
Academic placements	P
Student course evaluations	U, M, E, P
Faculty teaching evaluation	U, M, E

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Faculty curriculum review	U, M, E, P
Strategic Planning	U, M, E, P

Number of Ph.D. program graduates is used as an indicator of program success and faculty research success.

Ph.D. thesis defenses are attended by area faculty and are an important feedback mechanism for assessing program effectiveness and making curriculum changes and advising changes for the Ph.D. program. The School of Management does not have a master's thesis requirement.

Formal external reviews were completed twice in recent years and covered all programs, service, and research activities. The first was a UTD review of the School's programs and operations in 1993. This review was conducted by a panel of prestigious academics from major institutions and representing all the areas of specialization within the School (e.g., accounting, finance, marketing, organization studies, international management, etc.). This was followed by an external review by the American Assembly of Collegiate Schools of Business (AACSB) in 1994. The outcome of this review was "continuing review," and the School withdrew from the review process in 1995 with the intention of building faculty resources in critical areas, principally accounting. Hasan Pirkul was appointed Dean in 1996 and has entered the School in the AACSB accreditation pre-candidacy program. The current expectation is that the School will participate in the pre-candidacy program in 1997-98, enter the self-study phase in 1998-1999, and undergo an accreditation review in 1999-2000.

Advisory Board: The School of Management Advisory Council plays a key role in advising the School and reviewing programs. Advisory Council participation in evaluation and review takes many forms, varying from ad hoc assemblies of individuals with particular interests brought together to advise on a curriculum development to formal task forces that conduct reviews in conjunction with faculty (e.g., reviewing the School's undergraduate accounting program). In addition, individual programs like the Organization Development and Change Management Executive Program have their own Advisory Boards put together to monitor and develop specialized curricula.

Alumni feedback is a review source the School is actively cultivating. At present, feedback tends to be very program specific, but this will be a very important vehicle for evaluation and outcome measures in the future.

Student feedback also tends to be very program specific, but this is another evaluation source that the School is actively pursuing, both by gathering more information directly from students on various student service processes and by including students on more decision making committees. This has already been implemented to some degree by the inclusion of students on the School's strategic planning committee.

Certification exams are widely used in various areas of accounting, and the School's accounting program actively supports certification of students at all levels. Professional certification is more limited and not as strictly governed in other areas (e.g., Certified Financial Planner), and non-existent in most areas in which the School's students are employed. But the School does use certifications as an outcome indicator where they are an important factor in professional success.

Professional exams/standardized exams are also used in accounting, where the CPA exam passing rate is a commonly referenced indicator of program performance. GMAT performance is also used in some limited instances, but it is very tough to collect this information on a systematic basis because it is standard practice to work for 3-5 years before entering an MBA program, and students typically defer taking the GMAT until they are considering entering graduate school. GMAT scores are used extensively to characterize the quality of the inputs into graduate programs, especially the Ph.D. program, but they are also a common indicator of program quality for MBA programs.

Student internships are used on a limited basis, but their use spans undergraduate, graduate, and executive programs. At this point, very few students are participating in internships, but this is expected to change in the next few years, at which time the internship experience of students will be a very important quality check on the School's programs.

Graduate school placements suffer the same limitations as the GMAT, so are used to a very limited extent. These are also a factor in the master's programs because the School would like to attract its best master's students into the doctoral program.

Core course performance is the common experience all students have in the master's and executive programs, so it is a very important internal evaluation standard. It is used to evaluate admission standards and as a key benchmark for evaluating the class performance of our executive program students relative to students in our regular programs. Since students take a wide variety of courses in their elective curriculum, core course performance is a key indicator for all master's and executive programs. Similarly, the IMS Ph.D. program has a core sequence, and performance in this sequence is a key indicator of evaluation standard efficacy and as a measure of class performance.

Capstone courses (perhaps better thought of as keystone courses) are an important source of information about student preparation in the entire degree program. The strategy capstone is generally taken toward the end of the program, is required of every student, and is integrative in the sense that it requires students utilize all their business tools, including financial analysis, production design, and decision making. Erosion of skills in any area within the School first shows up in the capstone strategy course, which makes it an important evaluative element

Grade Point Average (GPA) is used extensively to capture program trends, student performance within programs, and as a relative success measure for programs (e.g., average GPA is commonly used in conjunction with the GMAT score to rank graduate programs).

Field course performance is mainly used by the School's executive programs, which use field courses as key curriculum elements, but this evaluation device is also used in some of the master's programs that use structured field experiences as supplements to the curriculum (e.g., Cohort MBA Program).

Graduation/attrition rates are used by the School's most selective programs, which are also cohort programs in which it is fairly easy to monitor graduation rates. It is much more difficult to use such measures in UTD's regular programs because students remain in progress for extended periods of time, and just because a student is not taking courses at a particular time does not mean that they have dropped out of the program. In addition, the School of Management attracts a significant number of non-degree students interested in only taking a few courses, but some change their mind and enter programs, so it is never clear what the exact risk set is for computing an attrition rate.

Undergraduate honors theses are completed by students wishing to graduate Magna Cum Laude and Summa Cum Laude (graduation with Honors, or Cum Laude, does not require an honors thesis). Honors theses are supervised by a full time member of the faculty and the College Master typically serves as the second reader on all theses, a policy that allows the Master to see the full breadth of work done by our best undergraduates. These theses not only serve as an important outcome indicator, but they also serve as a capstone for the undergraduate program for the very best of UTD's students.

Employer feedback is collected on a limited basis at present, but this is an area where the School is making a major effort. Much of the feedback that is currently generated is through individual faculty contacts, and it tends to be most intense in executive programs, largely because the employer is typically serving as financial sponsor for the student in the program. The feedback from employers is an important source of information on what we are doing right, something that is harder to get from other sources.

Employer donations to the School are an important indicator of the value the student's education is providing to the employer. This value tends to be most apparent in the School's executive programs because the students do a great deal of project work within their firms and provide direct documentation of impact. Although this success indicator is not systematic, the successes themselves and associated donations are a very tangible evaluation of outcomes.

Graduate career tracking is an important indicator of outcomes for the School's executive programs and are used on a more limited basis with the regular

graduate programs. This mainly takes the form of promotion records, but the measures under development for the Ph.D. program also track publications and placement information. The School would like to eventually use an alumni network to provide systematic information on career outcome for all graduates.

Placement information is currently somewhat haphazard, but the School is attempting to make this systematic. Placement information is more readily available for programs that have relatively small enrollments and close student–faculty ties, such as the Executive and Ph.D. programs.

Faculty consulting is a very important feedback mechanism for any school that includes applied sciences, and this describes the School of Management. Faculty consulting is in part a money making opportunity for faculty, but from the School's perspective, it also insures faculty are in contact with real business problems and are versed in current developments. In addition, faculty consulting is a major source of dialogue with the business community, ensuring the community is well versed on current research developments and educational opportunities.

Faculty field research is somewhat limited in the School, but that which is done is an important point of reference for the School's programs. Just like consulting, the dialogue that occurs in conjunction with field research programs is an important source of ideas for curriculum development.

Exit interview with graduates are somewhat sporadic at the moment, but those that are done provide important information. Again, these tend to be most systematic in the Executive Programs, but they occur in virtually every program and principally through the graduation advising function.

Academic placements are the indicator of success for the School's Ph.D. programs.

Student course evaluations are done for every course offered by the School. These are in turn reviewed by the Dean's office, area coordinators, and individual faculty. Improvement in response to evaluations is primarily the responsibility of individual faculty members, but consultation with the area coordinator occurs where the teaching performance is below average.

Faculty teaching evaluation (e.g., peer assessment of teaching) is most systematic in the School's Executive Programs, but occurs in other programs within the School. The School's Teaching Committee is currently formulating a Teaching Evaluation Policy designed to meet the standards of the UTD Teaching Evaluation Policy.

Faculty curriculum review takes place frequently within defined curriculum groups, and the core curriculum of the School is reviewed every 2-3 years to ensure it is current and in compliance with accreditation standards. The formal

accreditation process the School is entering with the AACSB requires a thorough curriculum review, so this is something that will take place formally in the next two years.

Strategic planning has been instituted at the School level this academic year, but some groups within the School (e.g., accounting and OSIM) have done strategic assessments that predate the School process. The School's strategic planning process is largely complete and operational plans are being formulated, which means groups within the School will be making important strategic decisions in the next few months.

While the range of evaluation and review activities that result in planning and improvement efforts is extensive, the School as yet does not have a well integrated planning process. Individual groups and subunits within the School are engaged in a wide variety of evaluation efforts and have planned in accordance with the information gathered, but these efforts have at times been counter productive from the perspective of the School as a whole. And this is why Dean Pirkul has made the development of an integrated evaluation and planning system a focus point during his first year at UTD.

Table 2. Undergraduate Programs

<i>Feedback/evaluation Process</i>	Accounting	MIS	Other
Faculty Publications	X		
Faculty Citations	X		
Student Publications			
Research Funding			
Ph.D. Student Production			
Thesis Defense			
Formal External Program Review	X		
Advisory Board	X		X
Alumni Feedback	X	X	X
Student Feedback	X	X	X
Certification Exam/Professional Exam	X		
Standardized exam performance	X		
Student internships			X
Graduate school placements	X		
Core course performance			
Capstone course performance			X
GPA	X		X
Field course performance			
Graduation rate/attrition rate			
Undergraduate honors theses			X
Employer feedback	X		
Employer donations to school			
Graduate career tracking			
Placement		X	
Faculty consulting			
Faculty field research			
Exit interviews with graduates	X		X
Academic placements			
Student course evaluations	X		X
Faculty teaching evaluation	X		X

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Faculty curriculum review			X
Strategic Planning			X

Table 3. Master's Programs

<i>Feedback/evaluation Process</i>	M.A.	MBA & M.S.	Cohort MBA
Faculty Publications			
Faculty Citations			
Student Publications			
Research Funding			
Ph.D. Student Production			
Thesis Defense			
Formal External Program Review	X	X	
Advisory Board		X	X
Alumni Feedback	X	X	X
Student Feedback	X	X	X
Certification Exam/Professional Exam		X	
Standardized exam performance	X	X	X
Student internships	X	X	X
Graduate school placements			X
Core course performance	X	X	X
Capstone course performance	X	X	
GPA	X	X	X
Field course performance	X	X	X
Graduation rate/attrition rate			X
Undergraduate honors theses			
Employer feedback		X	
Employer donations to school			
Graduate career tracking			X
Placement		X	X
Faculty consulting		X	
Faculty field research		X	
Exit interviews with graduates	X	X	
Academic placements			
Student course evaluations	X	X	X
Faculty teaching evaluation	X	X	X

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Faculty curriculum review	X	X	X
Strategic Planning	X	X	

Table 4. Executive Programs

<i>Feedback/evaluation Process</i>	EMBA	ODCM	MIMS
Faculty Publications	X	X	
Faculty Citations	X	X	
Student Publications			
Research Funding			
Ph.D. Student Production			
Thesis Defense			
Formal External Program Review	X	X	X
Advisory Board	X	X	
Alumni Feedback	X	X	X
Student Feedback	X	X	X
Certification Exam/Professional Exam			
Standardized exam performance			X
Student internships		X	X
Graduate school placements			
Core course performance	X	X	X
Capstone course performance		X	X
GPA	X	X	X
Field course performance	X	X	X
Graduation rate/attrition rate	X	X	
Undergraduate honors theses			
Employer feedback	X	X	
Employer donations to school	X	X	
Graduate career tracking	X	X	
Placement		X	
Faculty consulting	X	X	
Faculty field research	X	X	
Exit interviews with graduates	X	X	X
Academic placements			
Student course evaluations	X	X	X
Faculty teaching evaluation	X	X	X

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Faculty curriculum review	X	X	X
Strategic Planning	X	X	X

Table 5. Ph.D. Programs

<i>Feedback/evaluation Process</i>	Management Science	International Mgmt.
Faculty Publications	X	X
Research Citations of Faculty Publications	X	X
Student Publications	X	X
Research Funding		
Ph.D. Student Production	X	X
Thesis Defense	X	X
Formal External Program Review	X	X
Advisory Board		
Alumni Feedback	X	X
Student Feedback	X	X
Certification Exam/Professional Exam		
Standardized exam performance	X	X
Student internships		
Graduate school placements		
Core course performance		X
Capstone course performance		
GPA		X
Field course performance		
Graduation rate/attrition rate		X
Undergraduate honors theses		
Employer feedback		
Employer donations to school		
Graduate career tracking		
Placement	X	X
Faculty consulting		
Faculty field research		
Exit interviews with graduates		X
Academic placements	X	X
Student course evaluations	X	X
Faculty teaching evaluation		

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Faculty curriculum review	X	X
Strategic Planning		X

APPENDIX I STRATEGY SUMMARY⁹

School of Management University of Texas at Dallas

Vision

*An institution of choice, preparing tomorrow's business leaders and
expanding the frontiers of management knowledge.*

Mission

The School of Management's mission is to meet the challenges of a rapidly changing, technology-driven, global society by partnering with the business community to:

- deliver high quality management education to a diverse group of undergraduate and graduate students and practicing executives;
- develop and continuously improve programs advancing management education and practice;
- conduct research enhancing management knowledge.

Strategy, 1997-2002

The School of Management was established at UTD in 1975. In its first 20 years, the School's faculty and the University administration worked together to build a foundation of excellence that includes dedicated scholars and teachers, a strong working relationship with a local business community that is global, diverse and technologically sophisticated, a strong student base, and a large number of talented and successful alumni. It is this foundation of excellence that is the basis of the School's strategy for its third decade.

The School's strategic objectives for 1997-2002 build on its strengths. The objectives are:

- Build on the School's existing quality and strengthen student services to achieve recognition as a top tier institution.

⁹ This summary is intended as a concise presentation of the School's strategic direction for external constituencies and potential strategic partners. While lacking the detail of the full strategic plan, it captures the strategic initiatives that will define the School of Management in the future.

- Establish partnerships and alliances with key members of the business community.
- Involve the School's alumni in every facet of the School's operations and build a strong alumni network to support the School's ongoing development.
- Enhance general awareness of the School by building its visibility in the local community and as a national institution.
- Expand the School's resource base so that excellence can be maintained.

The School's faculty and administration are implementing the following initiatives in order to achieve these objectives:

- Continuing to build a faculty of scholars and teachers of the highest calibre.
- Innovating in programs and modes of delivery to meet the needs of a student body that works globally, must manage change, and is technologically sophisticated.
- Establishing an integrated Career Services office that handles all aspects of advising, career development and placement with development activities that begin when a student enters UTD and continue through job placement and post-graduate career development. The Career Services office has programs for students interested in advancing with their current employer as well as those looking for a new position.
- Building multifaceted relationships with key business partners, including strategic alliances, educational partnerships, and other forms of co-development that benefit the School's partners and students.
- Involving the School's alumni in virtually every aspect of the School's operations to establish a relationship with the School that lasts a lifetime.
- Developing a funding base for the School that ensures excellence, provides the resources necessary for growth, and establishes the ground work for building a world class management education facility.
- Creating a reputation for excellence that places the School among the premier schools in the world.

The School's vision is ambitious, but its strategic goals are within reach because of 20 years of hard work by a group of dedicated scholars, administrators, business people, and students. These same people will make the School of Management an "institution of choice," and they will succeed doing the same things they have been doing for 20 years, building excellence.