

**MEMORANDUM**

Date: March 9, 2004  
To: Jim Wagner  
From: Tom Robertson  
Subject: Opportunity Committee

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Dear Jim:

I had the pleasure of conducting an *Opportunity Committee* discussion on February 27 with twelve faculty participants. The data from this session are incorporated in the following four documents.

Attached you will find:

- Document 1. Instructions to the Opportunity Committee
- Document 2. My interpretative summary of the proceedings
- Document 3. A second summary by Dr. Rick Gilkey (Goizueta) who acted as scribe. These are the notes from the flip charts
- Document 4. Notes from Tom Remington and David Holtgrave, who unfortunately could not attend, but were kind enough to submit ideas.

I look forward to further discussion and hope that these results are useful to our strategic planning process. Thanks.

**DOCUMENT 1. INSTRUCTIONS TO THE OPPORTUNITY COMMITTEE**

February 24, 2004

TO: Professor Penelope England  
Associate Professor Deborah Ryan  
Dr. M. Patrick Graham  
Dr. Leonard Howell  
Professor Martha Fineman  
Dr. David Holtgrave  
Dr. Bradd Shore  
Associate Professor Karen Stolley  
Dr. Narasimhan Jegadeesh  
Dr. Thomas F. Remington  
Dr. Angelika Bammer  
Professor Rebecca Pentz  
Dr. Nelson Oyesiku  
Dr. W. Virgil Brown  
Professor Roderick W. Gilkey

SUBJECT: ATTACHMENT: VISION STATEMENT

Dear Committee Members:

This is to confirm our meeting Friday on the subject of strategic planning. We will plan to begin at 8:00 am sharp in Room 513 (5<sup>th</sup> Floor) at Goizueta Business School.

Let's take the Vision Statement (attached) as our starting point. I see essentially three questions:

1. What opportunities should Emory pursue in the next 5 to 10 years? I would suggest that these be major initiatives at the leading edge of knowledge and that they might involve a single school or be cross-disciplinary.
2. What orthodoxies or issues might constrain us from pursuing these opportunities and what changes, therefore, are necessary at Emory?
3. If Emory is "poised" for a great leap, where should it be certain to land?

## **Committee 7 Report**

Our session will be a single event of only two hours. We want to maximize the generation of ideas and we will not allow critique at this session. We will hope to arrive at a limited set of major ideas to go forward.

If you are unable to attend this session please submit to me your suggestions on the three questions above so that every member can participate in this planning committee.

Many thanks.

Thomas S. Robertson

Attachments

DOCUMENT 2.

**INTERPRETATIVE SUMMARY BY DEAN TOM ROBERTSON OF  
IDEAS SUGGESTED BY THE OPPORTUNITY COMMUNITY**

OPPORTUNITIES

A. Scale & Growth

- What is the appropriate scale of the University?
  - \*\* some programs are too small
  - \*\* Atlanta is high growth but should Emory follow suit?
  - \*\* should the College stay at 5,000 students?
  - \*\* is Emory “stuck in the middle”—not large and not small? does this matter?

B. Focus and Differentiation

- Emory needs to focus and be the best in some areas
  - \*\* need to choose areas for focus
  - \*\* need to decide what not to do
- Emory should represent absolute integrity as its differentiation
- Emory should be problem oriented and problem solving in research and teaching across schools and areas
- Emory should seek to have impact on humanity
- Emory should be renowned for how to recognize good teaching

C. Emory’s Center

- There is a question as to where Emory’s center is
- There is also a question as to whether Emory needs a center—university vs. multiversity

D. Resource Advantages

- Leverage our available resources
  - \*\* emeritus faculty, who are presently largely ignored
  - \*\* alumni in the area
  - \*\* the Carter Center and its expertise in human rights and international affairs
  - \*\* the uniqueness of the health science complex

E. Interdisciplinary

- Interdisciplinary is better thought of as problem solving
  - \*\* identify problems and issues for faculty to rally around and contribute; for example, AIDS, human rights, aging of the world population, social responsibility
- Need a structure to encourage interdisciplinary. Some believe that we already are organized to do this.
- Need to communicate across schools what is going on at Emory
- Encourage interdisciplinary via summer funding opportunities
- Build a greater sense of community at Emory

F. Internationalization

- Emory should respond to international issues and challenges
- Atlanta as a major access point to the world
- Our proximity to Latin America
- Greater focus on international students and visiting international faculty
- Build our reputation in other countries

G. Structure

- Structure and organizational design for Emory should follow strategy
- Nevertheless:
  - \*\* should there be a Dean for Interdisciplinary Studies?
  - \*\* bring the Library and IT together as a single entity
  - \*\* find ways to break down silos

H. Student Profile

- Who should our students be—brilliant but what else?
- Is Emory a school for the affluent only?
- Attract Hispanics to Emory
- We need a statement as to what kind of students we want
- Give a higher priority to encourage students to work in the community and contribute to the community
- Attract students to become academics and engage in the conduct of research

A. Professional Schools/ Liberal Arts Tension

- Is Emory about the training of “professionals”?
- Need to recommit to the excellence of Liberal Arts
- Articulate Liberal Arts as an important part of Emory’s identity
- Reconcile the conflict between careers and academics

B. Resource Deficits

- Do we provide adequate research resources; for example, in medicine?
- Overcome the notion that Emory is rich in order to develop further resources
- Need more endowed chairs and corporate support

C. Faculty Productivity and Developing Young Faculty

- Need money, time, mentoring and support personnel
- Are we adequately focused on providing these resources to enhance faculty productivity and development?
- Lack of sabbaticals to open new vistas for faculty

D. Information Technology

- Perception is that IT problems exist
- A view holds that “technology translation” is necessary to help faculty. There is a disconnect between technology expenses and faculty training on how to use technology
- Should use more technology in teaching

E. Speed

- There is a tendency for Emory not to move fast enough in implementing new ideas
- Therefore, a gap remains because other top universities are not standing still
- Be closer to the “risk edge”

F. Reputation and Awareness

- Emory is not well enough known
- We must communicate what we represent as a University
- We must communicate a vision of excellence, rigor and integrity

**DOCUMENT 3. FLIP CHART SUMMARIES FROM PROFESSOR RICK GILKEY**

Discussion of this group divided statements into three categories:

- Ideas
- Resources
- Issues to address

- IDEAS

1. Focus on absolute integrity
2. Focus on social responsibility
3. Benchmark multidisciplinary collaborative successes—especially research
4. Define the center—what is the “center”—do we need one?
5. Pursue inquiry driven initiatives as a driver of strategic change
6. Organize around projects that bring people together and develop a collaborative culture
7. Focus on/invent the future—Define landing place—What are we known for?
8. Build academic excellence—focus and leverage, interdisciplinary structure potential
9. Track and initiate multidisciplinary efforts—structure to coordinate, and unify
10. Be problem oriented rather than discipline driven
11. Understand the role of Hispanics in education in Atlanta and the U.S.
12. Promote discovery interaction e.g. among sciences—leveraging our strength in sciences
13. Emory should be renowned for teaching excellence—develop our abilities to identify and develop the best and brightest teachers

- RESOURCES

1. Enhance IT support, leadership, infrastructure
2. Review allocation of *money*, especially for new, mid-career and top flight researchers—*time* (sabbaticals), *mentoring*
3. Draw on our values/aspirations—organize around themes e.g. absolute integrity
4. Leverage Emeritus Faculty talents and contributions
5. Define the kinds of students we want to attract/develop perhaps especially international
6. Pursue Alums as resource
7. Leverage Carter Center and all other University resources
8. Inventory existing programs, initiatives, and generate info so we know what we are doing and build on our best practices/programs
9. Develop links to Atlanta and Atlanta’s needs
10. Define our (problem focused) research capabilities

- ISSUES TO ADDRESS

## Committee 7 Report

1. Pursue interdisciplinary initiatives
2. Address scale issue—students/faculty/programs
3. Growth, goals? Links to community—limited foci with top quality
4. Need to implement rather than crawl (execution of ideas), speed
5. Address changing demographics, size, and diversity
6. Create communities of learning/research
7. Look at structure, reconfigure for teaching and research and new initiatives
8. Maintain and expand our commitment to liberal arts
9. Pursue international initiatives
10. Maintain focus on preparing professionals (especially teaching)
11. Capitalize on use of technology
12. Overcome image we are wealthy and have no financial needs
13. Evaluate role of learning agility—teaching people how to learn and transfer knowledge across boundaries
14. Address our culture

**DOCUMENT 4. NOTES FROM MEMBERS NOT PRESENT**

A. Professor David Holtgrave, Rollins

I would like to share just one thought in writing regarding the vision statement and the questions posed in your memo. In the next 5 to 10 years, I would like to see Emory identify a small handful of very critical social issues and work on them in coordinated teams from across the Campus. These teams could also involve relevant community partners from outside of Emory. For example, I am thinking about HIV/AIDS. In that epidemic, we are at a crossroads both domestically (in terms of stalled policy initiatives that doom us to roughly the same number of new HIV infections each year), and globally (in terms of lack of access to effective prevention and treatment services resulting in huge numbers of new infections and deaths each year -- all preventable). We need the effort of people from public health, medicine, psychology, sociology, theology (esp relating to faith-based organizations' role in the epidemic), business, law, chemistry, and the list goes on and on. Now Emory does have coordinated efforts in HIV from the public health and medical perspectives, but does not reach out nearly broadly enough across campus. I would love to see a true HIV/AIDS effort a major priority for Emory; I would also like to see a similar model used to tackle other pressing social issues. In terms of where we need to land after a great leap, I would say that Emory needs to be known across the nation and the world as a University that picks very hard social problems, works on them comprehensively and rigorously using the best methods of scientific inquiry, and then clearly speaks the truth about the findings -- regardless. That is my small contribution for the moment. If I can be of any assistance with this committee, please do let me know.

Thanks for listening!

David

B. Professor Tom Remington, Professor and Chair, Political Science Department

I appreciate your invitation to contribute responses to the questions you pose. I would offer a couple of ideas.

1. Opportunities for Emory: I believe that Emory could greatly improve its stature and visibility as a research university by taking advantage of contemporary advances in the social sciences. Enhancement of social science research at Emory would benefit the GBS, with its new PhD program, as well as scholarship in the arts and sciences, Rollins School, and law school. Relatively modest investments in areas that are at the cutting edge of social science scholarship would have the dual benefit of raising the visibility and quality of scholarship at Emory, and of allowing us to contribute policy-relevant research to issues of public concern. Such advances are evident in areas such as high-end statistical, formal, and spatial modeling, experimental methods in the social sciences, and neo-institutional theory in political science, economics, and sociology. Investment in research infra-structure such as a social science research center with a survey

research lab would benefit numerous students and faculty, serve as a catalyst for collaborative research, and provide leverage for substantial external research funding. Building in the social sciences is less costly than in the natural sciences and could have a comparable payoff for the university.

2. Constraints: Historically Emory has been susceptible to allowing the pursuit of high-visibility appointments or programs to come at the expense of building on solid foundations; likewise, we have sometimes allowed political expediency or academic fashion to dictate our choices. The relative priority of research, teaching, and public service has shifted too much. We need to define our core values and hold to them.

3. Where to land: Let's maintain the ideal of being a great research university that takes its teaching and service missions seriously. The pursuit of excellence should characterize everything we do.