

HBS Strategic Priority Goals & Action Items

May 2020

This document summarizes for discussion the primary strategic priority goals and action items that have emerged from our planning process in the following four categories: (1) Organization, Planning, & Personnel, (2) Research Program & Support, (3) Education (Academic & Outreach programming), and (4) Facilities/HBS Campus. See Appendix for MBA 643 recommended *strategic directions* summary.

I. Organization, Planning, & Personnel

Overarching goal: Improve organizational efficiencies in terms of structure, communication, planning processes and personnel support in order to create a more smoothly running and rewarding work environment and better achieve organizational goals in research, facilities & infrastructure, and academic program and public engagement.

Goals and Action Items:

1. Foster excellent working relationship between HBS and HBF, working toward common goals in enhancing the Station's capacity in research, teaching, and outreach.

- i. Develop an MOU between WCU/HBS and the HBF, clearly identifying roles and responsibilities of each party.
- ii. Foster effective cross-communication and planning with regular meetings of HBS and HBF leadership and Boards.
- iii. Confer with HBF leadership on how HBS/WCU can best assist with goals such as fundraising, grant writing, etc.
- iv. Ensure planning committees (Nature Center programming, Botanical Garden, etc.) are well represented by HBS and HBF stakeholders, and others.

2. Pursue a "people-focused" strategy employing the Human Resources Management (HRM) structure and Organizational Development (OD) best practices.

- i. Establish regular "core team" staff planning and brainstorming meetings [consisting of HBS exec & associate director, HBF exec director, business officer, program associate].
- ii. Establish at intervals regular general staff meetings for updates and discussion.
- iii. Ensure HBS positions are well-staffed [evaluate core personnel needs, etc.]
- iv. Encourage and support internal & external staff professional development opportunities.

3. Establish key HBS planning/advisory committees to aid in planning and project prioritization.

- i. Establish official standing Planning/Advisory Committees of the BOD consisting of representative stakeholders appropriate to each committee, e.g.: (1) Research infrastructure & support, (2) WCU & academic programming, (3) Botanical Garden & grounds, and (4) Nature Center & community engagement.
- ii. Develop guidelines / operating procedures for advisory committees, with understanding that projects/tasks will organically evolve with each committee.
- iii. Identify appropriate stakeholder groups for each committee and recruit participants.

4. Review and adjust HBS organizational / reporting structure for improved efficiency.

- i. Confer with WCU leadership, BOD, and HBF in changing the current "rake" reporting structure at HBS into a tiered approach.
- ii. Confer with HR and other appropriate WCU units to identify steps needed to formalize reporting structure.

5. Pursuant to item 4, consolidate all HBS positions as State/WCU positions regardless of funding source.

- i. Explore costs and necessary steps to convert currently non-State HBS positions (Nature Center Educator, HBF Director, etc.) to State positions using the soft-money model currently followed with grant- and donor-supported positions (Outreach Educator, 1/2 Horticulturist).
- ii. Establish a policy whereby all new positions at HBS will be State/WCU positions, regardless of funding source.

6. Raise HBS and HBF profile and public awareness regionally & nationally.

- i. Develop a portfolio of services/expertise/resources afforded by HBS and its staff, to be shared with all constituents and on the Station website.
- ii. Develop print and on-line marketing materials for all facets of the Station and its staff and partners.
- iii. Explore avenues for advertising in appropriate regional and national venues.

II. Research Program & Support

Overarching goal: Raise the profile of HBS as a field biology research center of excellence through continued improvement of research and instructional space and equipment, fostering the development of in-house research, and increasing overall researcher usage and diversity.

Goals and Action Items:

1. Establish research-in-residence position in a signature area for HBS to stimulate additional research at the Station and also raise its profile.

- i. Confer with BOSA and HBS faculty/researchers to identify logical niches for attracting a post-doctoral researcher, perhaps based on NSF model with academic appointment through WCU and duty station at HBS.
- ii. Pursue funding (grant support, etc.) for Postdoctoral Fellow to be based at HBS.
- iii. Leverage Postdoctoral Fellow appointment to further aid in raising the Station's profile in education/community engagement [speaks to NSF 'Broader Impacts']

2. Increase visibility of HBS research resources, scholarship

- i. Increase visibility of HBS Grant-in-Aid of Research program through social media, higher-profile / wider advertising.
- ii. Increase efforts to spotlight HBS researcher achievements via HBS social media.
- iii. Develop informational materials detailing research space, equipment, and natural areas access for prospective PIs. [website, fliers]
- iv. Spotlight HBS-based research and researchers in the Nature Center to foster better understanding of the Station's central academic mission and connect visitors with HBS research and researchers.

3. Research infrastructure: review status, opportunities, avenues for funding

- i. Formalize agreements with partner organizations (HCLT et al.) for researcher and faculty/student access.
- ii. Explore feasibility of establishing a set of permanent plots in representative biological communities.
- iii. Develop a cutting-edge distributed climate station at HBS.

4. Formalize Artist- / Writer-in-Residence program [foster STEAM approach] and expand art exhibitions and programs.

- i. Charge the new HBS Nature Center & Community Engagement Committee or a special committee or task force with developing guidelines for a more formalized Artist- / Writer-in-

Residence program, considering such factors as funding, housing, working space, and expectations for HBS community and public engagement.

ii. Accommodating Artist- / Writer-in-Residence: explore utilizing the Sato House for this purpose, or seek nearby cabin rental?

iii. Increase partnerships (WCU Fine Arts Museum, Bascom, local artists and galleries) for science and environment-themed art exhibitions and events at HBS.

III. Education (Academic & Outreach programming)

Overarching goal: HBS offers a diverse and distinguished year-round menu of premier courses and workshops in southern Appalachian ecology and organismic biology as well as environmentally themed humanities disciplines, serving a broad constituency including undergraduate and graduate students, life-long learners, STEAM teachers, federal and state agency scientists, and others.

Goals and Action Items:

1. Review HBS course and workshop menu, support, and faculty.

- i. Review existing academic and non-academic course and workshop menu to ensure continued relevance and identify opportunity areas.
- ii. Review costs of HBS courses and workshops, and housing, to determine if any adjustments are merited.
- iii. Inventory and review of field course equipment to identify deficiencies, opportunities.
- iv. Seek summer faculty stipend increase to ensure ability to recruit the best possible faculty to teach HBS courses and workshops.
- v. Establish 'summer faculty travel grant' & award procedures to aid recruiting excellent faculty to teach HBS courses and workshops.
- vi. Seek support for additional quality faculty housing at HBS (see Facilities).

2. Identify opportunities for "off-season" courses, workshops, and other programming.

- i. Expand STEAM Professional Development short-course opportunities.
- ii. Explore possibility of hosting Road Scholar and similar groups.
- iii. Expand "Jan Term" offerings, perhaps in cooperation with WCU Biology.
- iv. Recruit faculty to develop/offer collaborative field courses with other field stations nationally and internationally, perhaps modelled on current HBS-Ecuador course.
- v. Develop models for an HBS Master Naturalist certification program that integrates regular HBS courses and workshops, service opportunities, etc.
- vi. Expand use of HBS as a venue for small scientific meetings, retreats, and conferences as a way to both generate revenue and further raise profile of the Station.

3. Develop a fall semester-in-residence experience for WCU students and others on the "Study Away" model.

- i. Explore development of a revamped fall semester-in-residence program with UNC-IE.

ii. If agreement cannot be reached with UNC-IE, work with core HBS team and WCU partners (Biology, Env Sci, College of Arts & Sciences, Provost's Office, Registrar's Office) to map out an immersive fall semester experience for WCU students.

4. Develop / promote mechanisms to increase diversity among Station users.

i. Devise approaches to recruiting and other means of reaching out to groups under-represented in STEM to advertise the opportunities afforded by HBS, including under-represented students (HBS courses) and faculty/universities (HBS research facilities).

ii. Explore the possibility of establishing scholarships to aid under-represented individuals in attending HBS courses.

IV. Facilities/HBS Campus

Overarching goal: A beautiful, modern HBS campus that balances field station functionality in research and education with tourism and community engagement, making the Station a world-class destination for field biology research, academics, and public engagement.

Goals and Action Items:

1. Work with HBS facilities/campus advisory group and WCU Facilities Management to proceed with improvements for identified deficiencies.

- i. Weyman Building: Proceed with designer for a Weyman HBS 'campus center;' seek R&R support for building renovation.
- ii. Howell Admin.: Seek R&R support for upgrade/expansion.
- iii. Seek support (WCU, HBF) for additional Duplex unit for faculty/researcher housing.
- iv. Field equipment storage: Construct conditioned storage behind Coker Laboratory.

2. Explore possibilities for siting, design, and funding for new faculty/researcher residence(s)

- i. Explore with WCU leadership possibility of a capital appropriation.
- ii. Explore with HBF and WCU Development Office possibility of raising funds to support a Duplex-style faculty residence.

3. Continue implementation of HBS Botanical Garden Roadmap (2018) with Botanical Garden & Grounds advisory committee.

- i. Review progress on BG Roadmap; update Roadmap by integrating current BG planning and management documents (e.g. Collections Policy).
- ii. Work with community partners (e.g., Greenway) on continued trail improvements.

4. Pursue National Historic Register designation for Clark Foreman Museum and/or HBS campus as a whole.

- i. Continue working with Dr. J. Swigger (Assoc. Prof., Public History, WCU) and her students on research phase of assessment and nomination process for State Study List.
- ii. Continue working with Preservation Specialists with the NC State Historic Preservation Office to delineate options for National Register of Historic Places designation and their costs and benefits.

Appendix A. Recommendations for strategic directions: MBA 643 class summary

The MBA 643 analysis yielded the following recommended strategic directions for HBS, many of which informed the strategic action goals and priorities.

[✓ = accomplished or underway]

Strategic Direction Dimension 1: Strategic Revival

- o Strengthen HBS financial position working with key partners
- o Jump-start new HBS-based research projects and user-groups, especially multi-investigator grant-supported research
- o Design unique and interesting (niche) curricula for undergrad/grad students and others
- o ✓ Enhance and refocus HBS outreach efforts

Strategic Direction Dimension 2: Organizational Development

- o Revise current HBS organizational structure and job responsibilities to best support future development and communication needs
- o Cultivate a formalized structure for participatory strategic inquiry and continuous improvement activities
- o ✓ Develop mutually beneficial partnerships with key HBS collaborators
- o ✓ Establish plan for creating additional revenue generating activities, especially during under-utilized “off-season”

Strategic Direction Dimension 3: People Focused Human Resource Management (HRM)

Approach

- o ✓ Complete Associate Director search
- o Develop employee performance management framework [✓ WCU]
- o Formalize human resource development framework [✓ WCU]
- o Enhance employee engagement and participation
- o Evaluate additional core personnel needs and explore cost-effective methods to provide staffing support

Strategic Direction Dimension 4: Communication & Public Awareness

- o Formalize HBS internal communication framework to improve decision-making efficiency and transparency
- o ✓ Establish a clear communication framework between HBS and WCU to encourage knowledge and resource sharing
- o Develop specific and customized marketing plan for HBS core constituents and the target audience for various programs

Short- and long-term development opportunities:

- ✓ Establish as a center for research in environmental sciences in Southern Appalachians
- Enhance diversity and inclusivity in research, programs, scholarships, and outreach
- Create a niche position in K-12 STEM programs in [field biology, ecology]
- ✓ Improve/expand connections with K-12 schools and universities
- Address the affordability challenges for HBS researchers in residence through grants and scholarships
- ✓ Provide an onsite dining and gathering place for researchers, students, and visitors
- Improve community connections through a docent program
- ✓ Work with community organizations to address HBS parking constraints