



**UNIVERSITY OF OTAGO
STRATEGIC DIRECTION TO 2020
Approved by the University Council, 13 August 2013**

1. INTRODUCTION

Strategic Direction to 2020 is the lead strategic document for New Zealand's oldest and finest university, the University of Otago.

It signals our unwavering commitment and ambition as a research-intensive and predominantly campus-based university with strong national and international linkages and a focus on high-quality research, teaching and service outcomes.

Our commitment and ambition are anchored in a well-established vision, and a focused mission that is in accord with core values against which every action we take in pursuit of our academic purpose can and should be judged.

Strategic Direction to 2020 has been developed with substantial input from the University community and other interested parties. It provides a framework for units of the University to use in their own strategic and operational planning.

Strategic Direction to 2020 will be supported by an annually-updated Action Plan, and progress in respect of its key points of focus – which are grouped under seven strategic imperatives – will be monitored and reported on regularly.

2. VISION AND MISSION

Otago remains steadfast in its pursuit of a vision that was formalised in 2003. Our mission statement, which was also adopted in 2003, has been updated for *Strategic Direction to 2020* to highlight the University's commitment to the application of its knowledge and expertise.

Vision/ Ko te Aronga

A research-led University with an international reputation for excellence.

He Whare Wānanga e Aronui ana ki te Rangahau, e Rongonui ana i ngā Tōpito o te Ao i tōna Ikeiketanga.

Mission/ Ko te Uaratanga

The University of Otago will create, advance, preserve, promote and apply knowledge, critical thinking and intellectual independence to enhance the understanding, development and well-being of individuals, society and the environment. It will achieve these goals by building on foundations of

broad research and teaching capabilities, unique campus learning environments, its nationwide presence and mana, and international links.

Ko tā Te Whare Wānanga o Otāgo he whanake, he pupuri, he whakatairanga hoki i te mātauranga, i te ihomatua tātari kaupapa, i te whakaaroaro motuhake o te tangata, e nui ake ai te mōhio, te mārama, te hiatotanga, otirā, te oranga o te tangata, o te iwi hoki. E tutuki ai tēnei mā te rangahau me te tika mārika o te whakaako, mā te whai wānanga ahurei, mā te whakaū i tōna mana, me ōna toronga puta noa i te motu, i te ao.

3. CORE VALUES

In pursuing its mission, the University of Otago adheres to the following core values:

Intellectual Independence and Academic Freedom, encompassing

- institutional autonomy and individual academic freedom;
- the right and responsibility to question and test conventional wisdom;
- intellectual and artistic creativity.

Excellence, in

- research and teaching, according to international best practice;
- learning and living environments that enrich the experience of students and staff;
- administration, support services and technologies.

Knowledge, encompassing

- its creation, curation, preservation, and transmission;
- its application for public good and economic benefit;
- its relevance to the needs of students, employers, industry and society.

Leadership, in

- research, teaching and community service;
- professional practice and performing arts;
- the development of graduates equipped to shape the future.

Treaty-based Partnership, with

- Ngāi Tahu as mana whenua within their takiwā of Te Waipounamu and, through this, as the University's principal treaty partner;
- mana whenua in other locations where the University has a physical presence;
- other iwi and iwi groups as appropriate.

Partnership, with

- universities, both internationally and nationally, where there is a particular affinity or common purpose and other compatible research, education, health, community and commercial organisations;
- the city of Dunedin, as the major local authority for the University's main campus, and other cities and local authorities, particularly in areas where the University has a physical presence.
- Government and its agencies to enable major issues to be progressed from a strong evidence base;

Collegiality and Collaboration, with and between

- staff and students across all campuses of the University, in accordance with the ethos of the University as a community of scholars;
- our graduates and alumni, as permanent members of the University;
- other organisations for mutual benefit and public good.

Ethical Standards, encompassing

- institutional and individual conduct of the highest level;
- respecting and valuing others;
- respect for and protection of the environment.

Equity and Social Justice, encompassing

- equity in employment;
- equity in educational opportunities;
- support for full and equal participation and outcomes for all groups in society.

Stewardship, of

- the heritage and mana of the University;
- its physical, digital and financial resources;
- its intellectual capital.

4. STRATEGIC IMPERATIVES: AN OVERVIEW

The following strategic imperatives have been identified by the University:

- Excellence in Research
- Excellence in Teaching
- Outstanding Student Experiences
- Outstanding Campus Environments
- Commitment as a Local, National and Global Citizen
- Strong External Engagement
- Sustaining Capability

While there is, inevitably, some overlap between the imperatives, each addresses a critical issue or area from a particular perspective which is regarded as vital to our future. The observations that led to the selection of each imperative and the proposed response to the imperative appear on the following pages.

IMPERATIVE: EXCELLENCE IN RESEARCH

OBSERVATION:

The University of Otago is one of New Zealand's largest and most broadly capable research organisations. Our standing as a leading research university has been confirmed in recent years by the ongoing success of our staff in competitive research funding rounds, and by independent national and international assessments. Our individual researchers and research teams provide a strong base from which to further develop our research capability through to 2020, and beyond.

RESPONSE:

We will continue to take decisive steps to advance our research culture and ethos, to address questions of national and international importance, and to develop our national and international research profile. Discipline-driven fundamental research and scholarship will continue to be a strength, and we will continue to take a leadership role in developing interdisciplinary research, to address broad, complex issues.

In order to contribute to the national and international good, we will apply our research to enhance social and environmental well-being and human and animal health, and we will pay increasing attention to research for economic and commercial benefit. We will strengthen our commitment to kaupapa Māori research, especially that which supports iwi development.

Established and emerging areas of research strength will provide a foundation for promoting research excellence, and these areas will be nurtured and supported. We will foster joint research programmes with other universities and research organisations, both within and beyond New Zealand, and we will increase engagement with likely end-users of research.

We will attract and retain high-quality, research-active staff, and foster their development in a supportive environment. We will provide a similarly attractive, supportive environment for research students.

Outstanding success in research by both staff and students will be recognised and celebrated.

IMPERATIVE: EXCELLENCE IN TEACHING

OBSERVATION:

The academic performance of our students and the teaching awards secured by our staff confirm that Otago is at the forefront of New Zealand universities in teaching, and it is highly regarded internationally. We have focused on raising the calibre of our commencing student cohort, increasing expectations in respect of student academic performance, and recruiting a higher proportion of postgraduate students. We have also sustained a strong research-teaching link and promoted the evolution of teaching, most notably in response to the opportunities made possible by new technologies.

RESPONSE:

Teaching excellence will remain a high priority at Otago, and we will strive to further increase the calibre of our student cohort, the quality of their learning experience, and their educational outcomes.

We will remain committed to maintaining (or increasing at a manageable rate) the student roll, and to recruiting a higher proportion of postgraduate students. We will seek to recruit a higher proportion of Māori and Pacific students, and to provide an environment that supports their increased academic success.

We will pursue growth in our international student numbers and we will maintain the diversity in our international student cohort. International and postgraduate growth will be closely linked, with new postgraduate options expected to appeal strongly to overseas students. The ongoing incorporation of international perspectives in the curriculum, and an emphasis on student exchange, will be the other key elements of Otago's approach to internationalisation.

While Otago will remain a predominantly campus-based university, we will continue our commitment to distance learning and to other forms of course delivery, especially at the postgraduate level in areas where we have special expertise.

We will continue to embrace the use of new technologies in teaching, and be innovative in deploying them both to enhance the on-campus learning experience, and to facilitate dispersed delivery in areas where it makes particular sense to do so. Similarly, we will continue to invest in high-quality facilities and support services that sustain teaching excellence.

Recognising the central importance of excellent, inspiring teachers, we will maintain our commitment to enhancing the quality of teaching, and to recognising and celebrating outstanding teaching achievement. Teaching developments and programme delivery will continue to be informed by current research into teaching and learning, and by the insights provided by our students and recent graduates.

IMPERATIVE: OUTSTANDING STUDENT EXPERIENCES

OBSERVATION:

The Otago experience, which encompasses the social, cultural, and sporting aspects of student life as well as the pursuit of academic excellence, is one of the defining features of the University. It has its roots in the distinctive residential student lifestyle that the majority of Otago students enjoy.

Most of our commencing students leave home for the first time to attend Otago, and the University has a duty to provide outstanding pastoral support. Typically, the core of that support is provided through our residential colleges in a student's first year. The nature of that support changes, but is no less important during the transition to independent living that occurs when students begin flatting in close proximity to our main Dunedin campus or when they are based at one of our specialist health sciences campuses in Christchurch and Wellington, or while located elsewhere.

A common feature of the Otago experience wherever it occurs is a nationally unique and internationally rare opportunity for personal development through student experiences beyond academic study. This enriched student experience, in turn, leads to graduates who are distinguished not only by their academic achievement, but also by their intellectual and personal independence and maturity.

RESPONSE:

We are committed to working in partnership with students to ensure that their academic achievement, enjoyment of life, personal enrichment and the celebration of diversity continue to define their experience at New Zealand's only true residential university. We see tremendous scope to further that experience for both individual and wider societal benefit, and will take decisive steps to do so.

First, we will continue to nurture healthy and sustainable lifestyles through a mix of education and regulatory measures and by providing opportunities for high quality extracurricular activities. As well as supporting students to achieve their best while at Otago, our efforts in this area will lay a platform for benefits that extend into life as graduates.

Second, we will harness student altruism for the betterment of both students and the wider community. Our commitment in this area is consistent with our wider ethos as a university that contributes to society. It recognises both the collective strength of the Otago student body as a volunteer force able to do good in a wide range of areas, and the desire of many students to make a meaningful community contribution.

Starting with the residential college experience in Dunedin that is part of the first year for the majority of Otago students, we will continue to build a community-focused student experience in which thoughtful giving and service is embedded. Through this approach, which will be pursued across all of our campuses, we aim to produce an increasing proportion of graduates who add committed citizenship to their already well-recognised attributes as work-ready scholars. This mix of qualities will set these Otago graduates apart from those who have studied elsewhere, in the minds of both employers and the wider community.

IMPERATIVE: OUTSTANDING CAMPUS ENVIRONMENTS

OBSERVATION:

Otago is nationally renowned and internationally recognised for its exceptional campus environments, centred on Dunedin, and also encompassing its specialist facilities in Invercargill, Christchurch, Wellington, and Auckland.

As a primarily residential destination university, Otago has a particular need to create and maintain facilities – including grounds, buildings, equipment and information technology infrastructure that are world-class at all our sites.

New facility requirements that have emerged in recent years include student study spaces centred around informal social interaction, embedding sustainability in campus design and operation, new facilities to enhance health and well-being, and, a heightened awareness of the importance of adequate seismic strengthening.

A common feature of all our campus environments is their location within well-established urban environments. This location, in conjunction with the high concentration of heritage buildings on and around the Dunedin campus, has a major influence on campus development.

RESPONSE:

We will continue to enhance our campuses, to provide a high-quality environment for students and staff, and a welcoming environment for local communities and visitors. We will continue to enhance the overall aesthetic, amenity value and accessibility of each campus site. We will do so in ways that create a sense of place, and are complementary to the wider urban environment within which each campus is located.

Every campus building project will reflect and promote the University's vision of excellence, with particular attention to the quality of design, the construction materials used, and the relationship between buildings and the surrounding landscapes.

We will maintain the quality and character of heritage buildings, and further projects will be undertaken that provide social spaces both within and between buildings. We will ensure that our campus environments are safe, and a systematic programme of seismic upgrades will occur over the period of this document.

We will also strive to develop our campuses in ways that are responsive to the opportunities afforded by new technologies, and in this and other ways, we will meet the needs of a changing student mix and evolving research and teaching needs.

Sustainability will become embedded as a principle against which all aspects of campus development and operations are considered, and we will seek to develop national leadership and be genuinely world-class in this area.

Recognising the interaction between formally designated areas of campus and the surrounding campus precincts, we will work with the local authorities and other organisations in the cities in which we are located to ensure that wider campus precinct developments are coordinated and complementary to the areas in which they are located.

IMPERATIVE: COMMITMENT AS A LOCAL, NATIONAL AND GLOBAL CITIZEN

OBSERVATION:

New Zealand is in the midst of major demographic, social and economic changes which, over the course of the next few decades, will significantly alter the country. Key elements underlying these changes include the growing size and voice of Māori, the rapid expansion of our Asian population, the increasing size and aspirations of the Pacific community, and an aging population. These domestic changes interact with the international realities of greater global connectivity, the transformative rise of Asia and the Pacific Rim in the world, the challenging legacies of the global economic crisis, and the implications of climate and wider environmental change.

Otago has already made a purposeful response to the challenges posed by changing times. Our notable successes in Māori student transition and our achievement in responding to opportunities to access funding for industry-linked research are two examples of the way in which we are leading the way nationally. We are also well positioned to contribute globally, both because of the international profile of our academic staff, and the extraordinary dispersion of our graduates around the world.

RESPONSE:

We will show an unwavering commitment to a role that includes contributing to the regional and national good. We will support the participation and achievement of under-represented groups in university study, remain active in national debate about the future direction of the country, and engage internationally on matters of global betterment.

Our cornerstone treaty partnership with Ngāi Tahu and formal relationships with other iwi groups are foundations from which the University will extend its partnership with Māori. This flourishing partnership will include ongoing collaboration in research, and a continuation of innovative programmes to support transition into degree-level study, and ensure sustained success in that study.

We will take steps to strengthen our links with Pacific communities. Locally and nationally, our Pacific focus will be on transition pathways into degree-level study, and on securing successful outcomes from that study. Internationally, we will continue to support the development of higher education in the Pacific and deploy our expertise to help address other pressing issues facing the region.

We will be responsive to calls for universities to make a larger and clearer economic contribution locally, regionally and nationally. We will respond to this call by enhancing our contribution to the significant regional, national and international challenges that exist in fields such as health and well-being, society, and the environment.

A wide range of community service and outreach activities will be undertaken. These will foster a vibrant town-gown relationship in the cities in which we are based. We will embrace our role as a critic and conscience of society, and act in an ethically, socially, and environmentally responsible manner.

IMPERATIVE: STRONG EXTERNAL ENGAGEMENT

OBSERVATION:

The location of Otago's main campus in Dunedin confers outstanding advantages, but it also geographically separates much of the University from the major centres of population and political and economic decision-making. This location means that Otago must work especially hard to engage effectively with national bodies, much in the same way that New Zealand must work especially hard internationally.

RESPONSE:

We will continue to build strong relationships with the country's political, business, professional and community leaders and we will continue to secure representation on key educational, health and research bodies.

Through enhanced connections, we will become more responsive to emerging opportunities and priorities, and more active in influencing the shape of those opportunities and priorities. At the same time, we will utilise these connections to raise awareness of our capabilities in research and of the unique and positive benefits of the Otago student experience.

An important element of the better-connected University will be an enhanced entrepreneurial spirit. We will engage with a greater number and variety of partners, particularly in applied research and commercialisation. We will continue to pursue collaborative partnerships and other arrangements that assist in the application of research.

We will also pursue regular engagement with employers that will enable our academic programmes to evolve to better meet changing workplace needs, and will provide opportunities for other forms of interaction with employers to enhance their understanding of the University and optimise the employability of our graduates.

We will also enhance our efforts to develop mutually beneficial long-term relationships with our alumni. Consistent with their status as lifelong members of the University, we will seek to establish enduring connections that meet the needs of our alumni, and in turn to provide a range of avenues for them to support their alma mater.

Internationally, we will further develop vibrant partnerships with compatible research and teaching organisations. At the regional level, we will develop increasingly meaningful engagements with the communities in which Otago operates. We will do likewise with iwi, and so support post treaty-settlement Māori development.

IMPERATIVE: SUSTAINING CAPABILITY

OBSERVATION:

Universities are amongst the longest lived organisations in the world. Notwithstanding their substantial physical infrastructure, they depend more than anything else on the intellectual capital of their staff, many of whom are engaged in research which by its nature is undertaken over many years.

In order to sustain capability universities must, therefore, maintain a long-term view even when challenged by short or medium-term instability. At the same time, universities must evolve to meet the challenges of a changing world. Particularly when funded predominantly from public sources, they must also be mindful of the need to manage risk effectively and use resources efficiently.

In tandem with these requirements, the collegial nature that is a characteristic of successful universities must be acknowledged and jealously guarded in the way that we operate.

RESPONSE:

Working from a sound financial position, we will continue to invest in the staff, and the physical and information resources that are required to achieve and sustain excellence as a broad-based, research-led university.

We will advocate for adequate levels of Government funding, while seeking an increasingly diversified funding base to provide protection from fluctuations in support from particular funding sources. Entrepreneurial and enterprise-based activities, including the successful commercialisation of intellectual property, will assist in diversifying the funding base and in providing additional resources for investment. There will be further focus on securing funding from international and non-Governmental sources to support research.

Mindful of the fiscally constrained environment that is likely to feature over the life of this document, we will carefully scrutinise internal activities, processes and structures for both efficiency and effectiveness. Those that do not support the University's goals will be modified or discontinued. In areas where academic endeavour is not strong, decisions will continue to be made either to invest in improving performance or to reorganising and, if required, reducing or ending our involvement.

Care will be taken to sustain the University as a vibrant and diverse community, with members who are engaged in their own academic and professional callings, but who as staff and students also have an effective voice within the wider organisation and are supportive of its development and broader goals.