



Great Lakes Higher Education Consortium & Partnership Fund

**STRATEGIC PLAN
2023 TO 2026**



GREAT LAKES
HIGHER EDUCATION CONSORTIUM

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Introduction

The Great Lakes Region is shared by the United States and Canada and comprises eight states, from New York to Minnesota, as well as two provinces, Ontario and Québec. Before these lands were settled however, for millennia this region of North America, or Turtle Island, has also been the traditional territory for many Indigenous Nations and Peoples. Together, we have a tremendous responsibility to protect our water, land, air and living things while working together to create new opportunities for economic prosperity and individual well-being for all who inhabit this region.

For example, the region, if it were a country, is the world's third largest economy with an estimated annual economic output of US\$6 trillion. The Great Lakes region, as a result, supports over 50 million jobs across a variety of global sectors – manufacturing, energy, transportation, innovation, services, tourism, farming, etc. It is also responsible for more than half the total value of goods traded across the border each year, and over a third of combined U.S. and Canadian exports to world markets at a time of accelerated global economic change, disruption, and uncertainty.

In addition to serving as an economic hub of national, continental, and global significance, the people in this region have the privilege of sharing one of the largest freshwater systems on the planet, the five Great Lakes, which hold 20% of the world's and 84% of North America's surface freshwater. Sacred to Indigenous Peoples, this vast, but finite, natural resource, provides clean drinking water to 40 million people on both sides of the border and supports thousands of plants and animals, some very rare.

Looking ahead, like other large economies and ecosystems, the speed of globalization and our changing planet is forcing the deeply connected North American Great Lakes region to understand and confront a growing number of regional, bi-national, and global socio-economic and environmental issues that are reshaping the region's population centers, economic success and sustainability.

As highlighted in the 2019 report, *Great Lakes, Great Minds*, Great Lakes higher education institutions, which make up one of the most concentrated academic networks in the world for education, science, innovation, and entrepreneurship, can lead the way in building a region that can compete and win, with sustainability being a key driver of the region's future growth. After all, nineteen of the world's top 100 universities are Great Lakes institutions, one-third of the top 100 engineering schools in the U.S. and Canada are in the region, and 15% of the world's top 100 medical research schools call the region home too.

The region's institutions are poised to lead complex fields, notably advanced manufacturing and logistics, AI, semiconductors, and many other domains. But, while the combined strengths and assets of these world-class institutions are well-known and clearly exceptional, they remain largely disconnected and untapped from a region-building perspective. The urgency to change this is growing, especially with respect to addressing talent gaps through student development and mobility as well as the region's performance with respect to converting science into innovations and creating new businesses that drive regional commerce, job creation, and international trade.

Great Lakes Higher Education Consortium and Partnership Fund

The Great Lakes Higher Education Consortium (GLHEC) and Partnership Fund was formed in the October 2020-2021 timeframe with funding from the United States Mission in Canada to the Council of the Great Lakes Region (CGLR) and the leadership of the following six Great Lakes higher education institutions, or, the Founders:

- McGill University;
- Queen's University;
- University of Illinois System (Founding U.S. Co-Chair);
- University of Michigan;
- University of Toronto (Founding Canadian Co-Chair); and,
- University of Wisconsin;

The GLHEC and Partnership Fund was founded upon the recognition that the social, economic, and environmental future of the Great Lakes region will be shaped by both Canada and the United States with stewardship from Indigenous Nations, and the inclusion of the region's historically marginalized communities – but a large gap exists for formal collaboration across the border to “leverage shared regional economic strengths for building the workforce of today and tomorrow, spurring world-leading science and innovation, and cultivating the entrepreneurs that will produce the companies, goods, and services, and jobs that will provide prosperity for the region.”

To illustrate the need for greater institutional collaboration, the knowledge economy of the 21st century has brought a variety of disruptive trends including challenges associated with climate change, artificial intelligence, the internet-of-things, social injustice, and post-pandemic shortages to name a few. These disruptions don't happen in a vacuum on one side of the international border or the other. Rather, the two countries' futures in regions like the Great Lakes are mutually reliant. Our partnership and engagement efforts aim to correct historic and ongoing inequities by intentionally including Black and racialized persons, women, people with disabilities, and people of diverse sexual orientations and gender identities.

By bringing together the Great Lake region's higher education institutions in strategic alignment, including historically black colleges and universities (HBCUs) and Tribal Colleges, the members of the GLHEC believe that the region, with dedicated resources to create and facilitate deeper academic partnerships and collaborations between academia, industry and government across borders, can more effectively respond to the most pressing issues facing the region – and the world. Further, in a world of increased competition – for talent, researchers, business and investment, the GLHEC can also supercharge the region's sustainable development and growth by staking out ground in new and quickly emerging sectors.



About the Strategic Planning Process

The need to establish a clear, aligned strategic path forward is crucial for success. As a result, the founding GLHEC members and CGLR contracted EY to facilitate a series of three workshops covering Vision and Mission (December 2021), Turning Mission into Strategies and Goals (January 2022) and Clarifying Goals and Activities (February 2022) with representatives from the member institutions in order to establish a way forward over the next three years.

While each workshop was designed and facilitated around those central elements of a strategic plan, topics of conversation related to organizational purpose, operations, logistics, specific research and governance were inherent and organic throughout all three sessions. Throughout these discussions, a variety of themes emerged for creating a vision, mission, governance, and goals for the GLHEC:



► **Sustainable / Innovative / Public Serving**

Sustainability was top of mind for all participating group members throughout all three workshops. Discussion focused on not only research focused on environmental sustainability, but also economic and community sustainability for the region. Water research, hydrogen fuel research, and electrification are innovation areas of a particular competitive advantage for the region. Public service as a driving force for the GLHEC was another consistent theme throughout conversations. As institutions of higher education with a commitment to public service, GLHEC members emphasized the need to utilize their unique capacity to serve the public good in the region.



► **Collaborative / Regional / Leader**

Cross-border and regional collaboration were another major theme of discussion. Collaboration will help the efforts of individual member institutions and their researchers, students, and initiatives be greater than the sum of their parts. Working collaboratively and regionally is also critical to addressing societal issues that are bigger than political boundaries.



► **Inclusive / Equitable / Prosperous**

The group members also envisioned addressing socioeconomic disparities within the region by promoting inclusive and prosperous economic growth. As academic institutions, a focus on people – students, innovators, researchers, workers, and entrepreneurs of all ages and backgrounds – is a priority, and there are many ways the Consortium can directly support these aspirations in their activities, research, and advocacy.

2 Vision, Mission, and Goals



Vision of the Future

A vision statement describes the future, the ultimate outcome of an organization's successful efforts. The statement should be aspirational but logical, describing the world shaped by your actions. It should be simply written, clear in purpose, and inspirational to motivate action.

To help develop a vision statement for the GLHEC, EY asked members of the Consortium to consider the Great Lakes region and what words would describe it if the GLHEC is successful. The word cloud below summarizes the responses:



Ultimately, as a vision for the GLHEC was explored, it was felt that the success of the Consortium would lead to a network of U.S. and Canadian higher education institutions in the Great Lakes region, joined together through partnership, that is committed to using the combined power of their institutional capabilities to dramatically improve research and innovation, talent development, and business creation across the region. Additionally, the Consortium has the potential to bring value through partnership by:

- ▶ Connecting institutions and disseminating information to advance inclusive skills development, innovation and entrepreneurship, and research initiatives;
- ▶ Increasing available funding for research initiatives that serve the public good through internal and external partnerships;
- ▶ Serving as a resource for public and private partners seeking to address pressing issues; and,
- ▶ Establishing grand, cross-border, and multi-disciplinary research challenges to address the needs of the region.

Considering this input and other insights shared by GLHEC members, the Consortium prepared the following vision statement, which is purposefully bold, aspirational, and inclusive:

The Great Lakes Region collaboratively leads the world in innovation and entrepreneurship, sustainable and equitable economic growth, and service to the public good through academic excellence, research, and community engagement.



The GLHEC's Mission

If the vision statement describes the destination, then the mission statement describes how we will get there. The mission statement should clearly convey what an organization does and inspire others to get involved. With EY's assistance, the mission statement below was developed to describe how the Consortium will arrive at its vision of the future.

The Great Lakes Higher Education Consortium addresses pressing socioeconomic and environmental issues in service to the public good by advancing innovation, developing talent, and fostering collaboration amongst higher education institutions, between sectors, and across borders.

The mission statement can be broken down into the following components.

Cause: This summarizes who the GLHEC will serve, which is the public good throughout the region with particular attention being given to historically marginalized voices and communities. GLHEC will consider this at the core of its mission.

Action: Summarizes the role of the GLHEC as opposed to the individual member schools. Each higher education organization engages in a variety of research, workforce development, and innovation efforts. However, the GLHEC could act, and should act, as the regional convening organization, strategist, and forum for fostering collaboration between member organizations.

Impact: The GLHEC seeks to address the challenges associated with pressing socioeconomic and environmental issues, not just in immediate members' communities, but across the region broadly and within historically marginalized communities.

Consequently, as the GLHEC puts in place a governance framework and work plans to advance this vision and begins to perform its mission, it will focus on four core short-term goals for the next three years.

► *The GLHEC will foster collaboration among member institutions to enhance research, innovation, entrepreneurship, and education.*

The GLHEC offers an exciting opportunity to establish a community that consistently brings together the world-class higher education institutions of the Great Lakes region. Internal collaboration amongst the partner schools is a critical short term goal of the early stages of the GLHEC. While there are channels for informal collaboration amongst member schools, the Consortium could strive to formalize and deepen those channels to advance a variety of objectives in research, innovation, entrepreneurship, and talent development while paying particular attention to the disproportionate challenges faced by Indigenous Peoples and other historically marginalized communities in these areas.

Potential strategy 1 – Asset mapping: Great Lakes institutions have a wide variety of innovation, testing, entrepreneurship, research, and technology commercialization assets. An exercise in mapping out those assets throughout the region, starting with current GLHEC members, would not only paint a clearer picture of the region's marketable strengths, but it would also convey competitive advantages which could be leveraged for each of the member institutions. For example, Consortium members have already conducted an asset mapping exercise for water research. The exercise will also help identify areas of connectivity, exceptional strengths, and gaps that might need to be addressed later, such as, but not limited to, building a better understanding of Indigenous research strengths and building bridges between researchers. The results of this asset mapping can later be used for marketing of opportunities and outreach to private businesses as well.

Potential strategy 2 – Facilitated learning: The GLHEC could deepen connectivity between current and future members through planned facilitation sessions focused on issues ranging from practical obstacles facing cross-border research collaboration, future opportunities for student exchanges, and

forecasting potential regional challenges with a focus on talent, innovation, and entrepreneurship. These in person or virtual conferences increase touchpoints for faculty and students alike for member institutions.

Potential Strategy 3 – Knowledge sharing: Creating a platform or methodology for increasing knowledge and research sharing amongst member institutions, such as Two-Eyed Seeing, would encourage potential research partnerships, allow for members to adopt proven leading practices in education and entrepreneurship, and help advance a range of goals.

► *The GLHEC will build and strengthen external relationships to increase its impact and resources.*

The Consortium members expressed a desire to act as not only a convening body for higher education organizations in the region, but also a focal point for developing relationships with external organizations critical to the success of the Great Lakes region. This includes the private sector (established corporations, small businesses, start-ups, the capital community, etc.) and the public sector (i.e., federal, state, and local governments as well as sovereign Indigenous Nations).

Potential strategy 1 – Private sector outreach: The GLHEC could begin outreach to both private sector organizations to share the efforts of the Consortium and establish relationships that may be beneficial to all parties. Private sector relationships will be valuable for member organizations seeking external research funding and who want to pursue effective and impactful workforce development and entrepreneurship partnerships.

Potential strategy 2 – Seed grants: The Consortium could seek out potential sources for additional seed grants funding to create more proof of concept initiatives for the grand challenges (referenced in Goal 4). These grants could be a focal point for securing private and public sector investment into the GLHEC and act as a catalyst towards funding other, larger pool of grant monies to be developed for the Consortium members. The Consortium, with funding from the United States Mission in Canada, is already piloting a seed grant for the Sustainability of the Great Lakes.

Potential strategy 3 – Effective governance: Early on the GLHEC could establish an effective governance model for not only engaging members internally, but also for engaging outside organizations, Indigenous Nations, and historically marginalized communities. Stable and consistent governance models will be critical for the continued existence and sustainability of the GLHEC. Some examples of governance models from similar organizations to consider are shared in the next section of this report.

Potential strategy 4 – Organizational growth strategy: An organizational growth strategy is closely related but slightly different to establishing a governance structure. The GLHEC could develop a brief strategy focused on how they plan to grow and accept new organizations members and partners. This strategy could detail the creation of a dedicated website if desired, dedicated collateral, a prospectus for engaging new members, a shared calendar of events, and a timeline for growth goals and milestones.

► *The GLHEC will establish itself as a knowledge and service resource for the public and private sector.*

Members of the GLHEC emphasized the importance of public service as a key element in both the vision and the mission of the organization. The betterment of the public good for all residents, visitors, entrepreneurs, and researchers in the Great Lakes region is an ultimate final outcome of the efforts for the GLHEC. Rather than shy away from complex regional socioeconomic and environmental issues, the GLHEC could leverage the power of collaboration to contribute to solutions and offer itself as a visible resource that public and private sector entities could contact when seeking information or assistance with a variety of projects.

Potential strategy 1 – Establish position as a resource for government and industry: The GLHEC could begin the process of establishing itself as a door to the broader network of member organizations as a system of innovative higher education institutions committed to regional collaboration across borders. Spanning across state and international borders brings diplomatic and bureaucratic obstacles to systems change which will require strong government relationships across all levels for the GLHEC. Acting as a partner for governments and industry alike will better position the GLHEC for pursuing efforts of public importance.

Potential strategy 2 – Addressing regional challenges: The Great Lakes Region is positioned uniquely to address a variety of global challenges. The GLHEC has already established water resource management research as a priority area. It will remain important to continue pursuing regional challenges that can impact the public good within the region, but also impact the public good outside of the immediate region. Sharing these stories externally will help establish the GLHEC’s position as a leader and resource on regional topics and also raise awareness of great work being done in the region, which will help attract researchers, talented individuals, and investment.

► *The GLHEC will launch grand research challenges to bring focus to pressing issues and advance solutions.*

Each member institution brings a vast, world-class wealth of research expertise, facilities, faculty networks, and funding streams. The GLHEC could leverage those resources towards a targeted and collaborative set of “grand research challenges” which set out a specified timeline for the development of large scale projects. These challenges also offer the GLHEC a concerted focal point for where the consortium is really putting their effort into exploring solutions.

Potential strategy 1 – Establish major regional challenges: The GLHEC can act as a conduit body for facilitating and encouraging research teams, government bodies, and industry leaders across the entire regional ecosystem. We recommend that the GLHEC determine three to four of these challenges across the next five years. During the workshops, we heard that there are funding challenges for cross-border collaboration that encourage siloed research efforts.

Potential strategy 2 – Position members to help solve these challenges: The GLHEC can act as a collaborative body to tee up researchers for success in these regional challenges. It can be the gate-way to a larger support network – and also give researchers, innovators, entrepreneurs, and government personnel the platform for broader connection. The GLHEC can pursue a brief strategy focused on how to structure and promote these series of challenges.

3 Strategic Pillars for Change, Goals and Activities



The Strategic Pillars for Change are the areas where collaborative action can be taken, and where change must be realized. They represent the roadmap for getting us from where the Great Lakes region is today, to where it needs to be in order to lead the world in innovation and entrepreneurship, sustainable and equitable economic growth, and service to the public good through academic excellence, research, and community engagement.

Strategic Pillar 1: Research and Innovation – Supporting regional innovation by collaboratively advancing basic and applied research, across borders and sectors.

The GLHEC offers an exciting opportunity to establish a diverse community of thought and leadership that consistently brings together the world-class higher education institutions of the Great Lakes region. Internal collaboration amongst the partner schools is a critical short term goal of the early stages of the GLHEC. As stated in its proposed framework, GLHEC's R&I strategies can involve member institutions in asset mapping, facilitated learning, and knowledge sharing.

Direction

- Facilitate deeper cross-border partnerships between higher education institutions, businesses, and western and Indigenous governments in order to help the Great Lakes economic region further develop as a cross-border and global hub of applied science and advanced innovation

Principles

- Seek and identify collaboration opportunities through the Consortium members based on the existing challenges in the region (e.g. climate change issues)
- Bring businesses and government economic development agencies at the table to respond to their research needs and interests
- Translate research into innovation
- Promote calls for proposals, research funding opportunities within the Consortium members internally and externally

Strategic Goals

- 1 Define the programs or initiatives for private/public sector outreach and engage industry and all government partners
- 2 Determine 3 - 4 grand research challenges that will be supported by GLHEC initiatives
- 3 Advocate for policies and investments that support the vision of the GLHEC
- 4 Set up science teams with diverse representation and provide seed fund to facilitate collaborative proposals to work toward external funding opportunities to bring big grants to the region
- 5 Create collaborative research opportunities for faculty and students

Strategic Pillar 2: Talent Development – *Developing the future workforce for the region.*

The region's greatest economic asset is its network of over 2,600 accredited higher education institutions, many of which date back to the earliest periods of industrialization in North America. These institutions have been central in attracting workers to new urban centers and rural communities, as well as fueling growth in jobs and businesses in key sectors, such as food, forestry, clothing, manufacturing, and a wide range of other services. With today's and tomorrow's knowledge economy rewarding the most talented and best educated, the GLHEC has a tremendous responsibility ahead in developing the future workforce and ensuring the region's is ready to compete.

Direction

- Facilitate deeper cross-border partnerships between higher education institutions, businesses, and government in order to help companies diversity, equity and inclusion priorities and widening talent gaps in the region in order to develop the future workforce.

Principles

- Bring businesses and economic development and training agencies to the table to respond to their talent needs and interests.
- Engage Indigenous communities, historically marginalized communities, and other strategic partners to retain and attract talent that will help in building up a reliable workforce to take on the different endeavors
- Attract diverse students to fill evolving talent gaps and needs within industry
- Meet the workforce needs of today and the future
- Provide pathways that drive mobility, diversity, equity and inclusion

Strategic Goals

- 1 Implement joint educational programs and activities such as, but not limited to, student research challenges, student exchange programs, joint courses, and experiential learning opportunity for students to improve skills development and workforce readiness
- 2 Upskill / reskill region's workforce while developing new cross-border programs to create new streams of future employees

- 3 Partner with Indigenous and historically marginalized communities to understand and redress access to education issues and learning barriers

Strategic Pillar 3: Entrepreneurship – *Cultivating the next generation of entrepreneurs and business leaders.*

The proximity of the region's higher education institutions to the industries and supply chains that have been created over generations is also a key strategic advantage, from the many multinational and regional companies that have headquarters and/or operations across the region, to the over 8.0 million small businesses that employ millions of people in different sectors.

The GLHEC can play a vital role in connecting distinct institutional strengths and assets, such as university-based entrepreneurship degrees and certificate programs, business incubators and accelerators, in order to strengthen the role institutions have in turning promising ideas into new solutions and enterprises in the Great Lakes region.

Direction

- Facilitate deeper cross-border partnerships between higher education institutions, businesses, and western and Indigenous governments in order to connect institutional and industrial assets, such as business incubators and accelerators, across the border to help entrepreneurs and their companies scale and succeed

Principles

- Establish the GLHEC as a door to the broader network of member organizations as a system of innovative higher education institutions committed to regional collaboration across borders.
- Spark the formation of the next game-changing companies

Strategic Goals

- 1 Connect incubators/accelerators across the border
- 2 Develop a cross-border student and faculty innovation challenge working with industry partners and/or existing business programs

4 Milestones and Success Metrics

FIRST MILESTONE: Elevating awareness and strengthening the network (Year 1)

The first stage of the GLHEC's development will focus on fundamentals. With resource constraints, the GLHEC will continue successful ongoing activities, elevate awareness, and begin to expand its networks.

From a network perspective, this stage includes updating its governance activities in the form of Consortium's governing documents. This stage also includes the ongoing work of the GLHEC to develop inventories of programs, partners, and subject matter experts. With a clearly defined plan and articulated opportunities for engagement, the GLHEC will also begin to bring in more partners.

Activities supporting strategies

- 1 Grow impactful research and innovation, talent development, and entrepreneurship programs to drive integrated economic development activities across member and partner institutions.
 - Continue administration of joint seed grants
 - Facilitate joint identification and pursuit of federal, state, and other grant programs
- 2 Identify potential opportunities to share infrastructure and resources between member institutions.
- 2 Provide inclusive forums for learning, collaboration, and sharing of leading practices.
 - Continue participating in an CGLR's Great Lakes Sustainable Growth Forum
 - Start a new forum to collaborate (e.g., Water Webinar Quarterly Symposium, co-hosted by the Freshwater Collaborative of Wisconsin and GLHEC, starting in 2023)
 - Begin identifying individuals and organizations to include in communities of practice, such as Indigenous and historically marginalized communities, focused on each strategic pillar (research and innovation, talent development, and entrepreneurship)
 - Continue with asset mapping of a library of initiatives, leaders, and leading practices related to each goal area. Initially this can act as an internal repository to share with members as needed with the intent to develop a more integrated, online tool for interested parties to access and collaborate through (e.g., Water asset mapping, Indigenous research, etc.)
- 3 Collaborate with Great Lakes mega region stakeholders to define challenges, identify opportunities, and align activities.
 - Establish relationships with western and Indigenous government agencies and industry partners to share the strategic plan and identify opportunities for alignment



- 4 Advocate for policies and investments that support the vision.
 - Continue meeting with and polling member institutions to develop a list of priority needs and policy opportunities
 - Participate in provincial, state, federal, western and Indigenous government agencies discussions on relevant topics
- 5 Develop and execute a communications plan for the GLHEC.
 - Share talking points related to the strategic plan with members
 - Maintain a shared calendar of relevant trainings, presentations, and other events
 - Write a quarterly newsletter that shares success stories, upcoming events, and potential funding opportunities
 - Prepare an annual report on GLHEC activities, accomplishments, and progress towards strategic plan goals
 - Continue programming work inventorying activities, programs, and subject matter experts

Milestone markers / Key Performance Indicators

Successful accomplishment of this stage of the plan will be marked by:

- The completion of planning for the Consortium build out;
- a set of common communication tools that individual members may utilize to increase awareness and understanding of the GLHEC's role within the region;
- an expanded number of local, regional, federal and Indigenous partners engaged in activities with the GLHEC; and,
- taking inventory of programs, partners, and subject matter experts.

SECOND MILESTONE: Progressing towards shared goals (Years 1 - 3)

During this stage, the GLHEC will move integrated sustainable economic development from concept to reality in the Great Lakes mega region. The GLHEC can also begin to build its own capacity to pursue more ambitious activities.

As the GLHEC builds on its successful ongoing activities, demonstrating its value and moving past the first milestone, it may begin to expand programs such as the joint seed funding through support from new and expanded partnerships with member institutions, corporate sponsors, and region-wide economic development organizations. Similarly, the GLHEC could expect to be pulled into supporting initiatives from these other partners that would advance shared goals.

New activities supporting strategies

- 1 Grow impactful innovation, talent, and research to drive integrated economic development activities across hubs and partner institutions.
 - Explore opportunities to share educational resources and programs among institutions.
 - Conduct an equity assessment of internal activities and identify priority action items to increase inclusive opportunities
 - Launch programs and initiatives
- 2 Provide inclusive forums for learning, collaboration, and sharing of leading practices.
 - Establish formal communities of practice focused on the GLHEC's three strategic pillars:
 - Foster collaborative research and innovation to solve challenges that affect the region
 - Connect people of all ages, races, and ethnicities to inclusive pathways to talent development and economic opportunity
 - Develop pilot programs and models that will be utilized and scaled to address equity and sustainability needs
 - Create a new forum or conference
 - Establish an annual region wide competition that seeks innovative ideas to address a different challenge each year with the winner(s) receiving grant funding to further develop their concept
- 3 Collaborate with the Great Lakes stakeholders and partners to define challenges, identify opportunities, and align activities.
 - Partner with educational institutions, western and Indigenous government agencies, and industry partners to identify region-wide and local training needs and strategies to provide specialized, accessible services in all areas—including continuing education for adult learners

- Develop sector-specific engagement strategies with partners across the region. For example, this could include preparing marketing brochures and website content focused on targeted sectors that present a value-proposition for investment in the Great Lakes mega region and identify innovation and educational resources that support each specific sector
- 4 Advocate for policies and investments that support the vision.
 - Collect data around key metrics and disseminate an annual performance indicators report for the activities of the GLHEC to support advocacy efforts
 - Work with state, province and federal lawmakers, Indigenous governments, and external stakeholders to allocate funding for GLHEC operations and dedicated staff
 - Explore opportunities to fund dedicated staff at hubs to support the work of the GLHEC through public-private partnerships
 - 5 Develop and execute a communications plan for the GLHEC.
 - Create the GLHEC website to serve as a clear entry point for innovation and economic development within the Great Lakes mega region – including platforms to learn about and engage with research, education, and subject matter specializations at hubs and institutions across the state
 - Develop a comprehensive communications and outreach plan to share consistent messaging about GLHEC initiatives and success stories across traditional and social media platforms
- the development of an “entry point” website for the GLHEC that includes online portals to showcase research, education, and other related assets.

THIRD MILESTONE: Shifting momentum into full gear (Years 5 - 10)

During the third stage of development, the GLHEC will be recognized for its successful work, will launch more ambitious initiatives because of its internal built capacity, and will become a draw for talent and investment into the Great Lakes mega region.

As the GLHEC moves past the second milestone, it will have increased awareness, a successful track record, and more dedicated resources and staff to support expanding its activities. At this time, the GLHEC will begin to launch more proactive initiatives that require additional capacity, such as expanding the capacity to strategically engage the philanthropic and corporate communities.

New activities supporting strategies

- 1 Grow impactful research and innovation, talent development, and entrepreneurship programs to drive integrated economic development activities across member and partner institutions.
 - Develop and execute strategies to engage philanthropic and corporate communities to partner with and invest in the GLHEC and the activities of its member institutions
 - Provide incentives/funding for transformative research projects through private partnerships
 - Assist in establishing industry-specific centers of excellence across the region
- 2 Provide inclusive forums for learning, collaboration, and sharing of leading practices.
 - Expand the annual region-wide competition that seeks innovative ideas to address a different challenge each year with the winner(s) receiving grant funding to further develop their concept

Milestone markers / Key Performance Indicators

Successful accomplishment of this stage of the plan will be marked by

- formation of formal communities of practice and pilot programs around research and innovation, talent development, and entrepreneurship;
- increased funding for GLHEC events, programs, and activities from member institutions, corporate sponsors, and economic development partners;
- budgeting of operational funding for GLHEC activities and at least one dedicated full-time equivalent staff;
- expanded external awareness of the GLHEC nationally and globally; and,

- Develop more awards to recognize successful initiatives across the region including high school students and adult learners
- 3 Collaborate with Great Lakes mega region stakeholders to define challenges, identify opportunities, and align activities.
 - Collaborate on a region-wide comprehensive economic development strategy that integrates and aligns the activities of partner organizations to maximize economic impacts for all identified population groups and geographic areas
 - 4 Advocate for policies and investments that support the vision.
 - Expand the membership and reach with a focus on advocacy and information sharing across the region
 - 5 Develop and execute a communications plan for the GLHEC.
 - Execute an external marketing campaign to raise awareness of the Great Lakes mega region' success, share opportunities for investment, and attract new companies, talent, and capital investment

Milestone markers / KPIs

Successful accomplishment of this stage of the plan will be marked by:

- > continued increases in funding for research and education;
- > new partnerships are formed to address specific objectives;
- > graduates are retained within the Great Lakes mega region as a destination for talent from across the nation;
- > the Great Lakes mega region becoming known as a destination for talent;
- > increase in new company startups in the region;
- > increase in employment, capital investment, and global company attraction capacity;
- > becoming a trusted source for thought leadership at the regional, national, global levels; and,
- > GLHEC is recognized as a global leading practice in integrated economic development.

5

Governance



Executing this strategic plan will require effective oversight and organization as well as the engagement of diverse and historically marginalized communities in order to be successful and to provide future funders, partners, and members a high-level of confidence with respect to the responsible management of the GLHEC.

Organization

The Council of the Great Lakes Region, a co-founder of the GLHEC, will power the GLHEC and serve as its Secretariat. In addition, an Executive Committee and Advisory Board, as outlined below, will be constituted to inform and help activate initiatives of the Consortium:

A *GLHEC Executive Steering Committee and Working Groups.*

An Executive Steering Committee has been formed by the initial academic members in order to provide advice to the CGLR on material aspects of the Consortium's advancement, as outlined in the strategic plan, such as programming, staffing, and budget.

In the future, the Executive Steering Committee, which will be comprised of diverse voices and representation from Indigenous and historically marginalized groups, could develop and assign blocks of work to ad-hoc working groups, such as, but not limited to, the following: 1) Research and Innovation; 2) Talent Development; 3) Entrepreneurship; and, 4) GLHEC Development.

B *GLHEC Advisory Board.* An International Advisory Board made up of prominent Americans and Canadians residing in the Great Lakes region from representing western and Indigenous governments, business, non-profits, and historically marginalized communities could help inform the work and activities of the GLHEC. It could also assist with fundraising efforts, as well as engagement with government and industry.

Expansion Strategy

The initial focus of the Consortium is on connecting and engaging research intensive Great Lakes higher education institutions in year one of this plan in light of their strengths and assets relating to the priorities outlined in the Great Lakes, Great Minds report and this plan. However, as we learn, adjust, and grow this initiative, expanding the Consortium to involve other research-intensive academic institutions in the region, as well as non-institutional partners and supporters, over the next three years will be critical for its long-term success and impact. A governance framework, including tiers of membership and support, will be developed immediately to guide expansion and ensure the Consortium is inclusive and representative of the talent-building, scientific, innovation and entrepreneurship strengths that exist in the bi-national Great Lakes region.

6

Resource Considerations



The founders and first members of the GLHEC have a sizable impact on the success of their home state and province, as well as the region as whole. In fact, on a combined basis, these institutions are responsible for educating over 460,000 undergraduate and graduate students each year, employing over 150,000 people, and generating US\$6.3 billion (CA\$8.6 billion) in research spending across an array of disciplines.

Innovative institutional partnerships, therefore, as well as collaborations between academic institutions, business, and government, have the potential to be an even more powerful source of regional economic growth that is inclusive and sustainable, providing public-private sector funding is available to seed, scale and sustain these partnerships and collaborations.

Staffing

As agreed in the Memorandum of Understanding forming the Consortium, CGLR will serve as an administering agent for the Great Lakes higher education institutions, which will include:

- Serving as the secretariat for meetings of the GLHEC and other convenings with industry and government as required, including at CGLR's annual Great Lakes Economic Forum
- Conducting public policy research to inform and advance GLHEC discussions
- Advancing the GLHEC goals and planned activities outlined in this plan
- Building the Partnership Grant Fund and assisting with additional external funding opportunities for programs; and
- Creating a stronger regional voice for higher education institutions in the Great Lakes in shaping the region's future.

The ambition set-out by the GLHEC in this strategic plan will take time to materialize because it takes time to build capacity and awareness and to learn from doing. However, to get started, in addition to the resources that already exist within CGLR, which is serving as the Consortium's Secretariat, that will be leveraged, such as the President and CEO position and its legal

and accounting services, the following full-time equivalents are essential over the next three years, either through staffed or loaned positions from member institutions:

First Year Priority

- **Program Manager:** This position will be responsible for managing the day-to-operations and development of the GLHEC.
- **Development Manager:** This position will identify and secure sources of funding for internal operations and the Partnership Grant Fund, supporting the Program Director.

Second Year Priority

- **Communications Coordinator:** This position will oversee brand and message, media relations, and all communication platforms, supporting the Program Director.

Third Year Priority

- **Government Relations Manager:** This position will develop, maintain, and coordinate relationships with government agencies, supporting the Program Director

Dedicated Funding

Operations of the GLHEC and the Partnership Fund will be financed by a variety of sources ranging from governmental to foundation support. CGLR's administrative activities will be supported by the CGLR annual membership fees from the GLHEC member institutions plus additional dedicated funding that will be sought from different partners to build capacity for the GLHEC and achieve the goals outlined in this plan. At a minimum, this funding would cover the positions and staff identified in this plan, the GLHEC's planned program of work, and funds for developing new collaborative platforms. Finally, securing dedicated public-private sector funding, from both sides of the border, to support and grow the GLHEC Partnership Fund will also be essential to the success of the GLHEC and this strategic plan.



7

Planned Initiatives



RESEARCH & INNOVATION

- | | |
|--|--------|
| 1. Determine three to four regional grand research challenges. | Year 1 |
| 2. Identify opportunities to connect through existing conferences and platforms. | Year 1 |
| 3. Hold webinar series to highlight regional issues and collaboration opportunities, starting with freshwater. | Year 1 |
| 4. Conduct asset mapping for focus areas determined in #1. | Year 1 |
| 5. Set-up science teams and provide seed funding to facilitate collaborative proposals to work toward securing big grants and funding opportunities. | Year 1 |
| 6. Define the programs or initiatives for private/public sector outreach and engaging industry/government partners for sponsored research opportunities. | Year 1 |

TALENT DEVELOPMENT

1. Develop student research challenges	Year 2 or 3
2. Develop and provide a short-term student exchange program (e.g., summer) for undergraduate, graduate, and postgraduate students.	Year 2
3. Develop and provide a semester-long exchange program for undergraduate, graduate, and postgraduate students.	Year 2
4. Co-develop courses and jointly teach them.	Year 2
5. Develop upskilling / reskilling programs for region's workforce and develop new cross-border programs to create new streams of future employees.	Year 3
6. Develop specialized joint higher education programs for Indigenous students and historically marginalized communities.	Year 2

ENTREPRENEURSHIP

1. Connect incubators / accelerators across the border.	Year 1
2. Develop a cross-border student and faculty innovation challenge with industry partners and/or existing business programs.	Year 2

INTERNAL ACTIVITIES TO SUPPORT THE GOALS (YEAR 1)

Governance	<ul style="list-style-type: none"> • Develop a governance framework for the consortium • Potentially establish quality assurance committee/working group to set up the bar for new members
Organizational Growth Strategy	<ul style="list-style-type: none"> • Detail the creation of a dedicated website, dedicated collateral, a prospectus for engaging new members, marketing/communication plan, a shared calendar of events, and a timeline for growth goals and milestones. • Develop a staffing model (internal organizational structure and resources)
Partnership building	<ul style="list-style-type: none"> • Develop engagement strategy for government and industry as it relates to the consortium's priorities and activities (e.g., conferences, organizational linkage through advisory boards or ex-officio membership, sponsored research opportunities, etc.)
Secure operating fund	<ul style="list-style-type: none"> • Develop a public/private sector partnership fund to support the planned activities: Members to establish seed fund and seek matching fund from governments and industry
Advocacy and Outreach	<ul style="list-style-type: none"> • Advocate for policies and investments that support the vision

EXAMPLES OF KEY PERFORMANCE INDICATORS

	KEY PERFORMANCE INDICATORS
Research & Innovation	Number of research teams formed/funded
	Research grants (\$) provided
	Matching fund provided by the project teams
	External funding secured by the science teams
Talent	# of research challenges
	# of students participating in student exchange programs – short term
	# of students participating in student exchange programs – a semester long
	# of courses jointly developed and taught?
	Cross-border workforce development program jointly developed
	Indigenous education program jointly developed
Entrepreneurship	# of incubators/accelerators that we connected
	Cross-border innovation challenges facilitated
Funding	External funding secured

Appendices

A. GLHEC and Partnership Fund Member Organizations and Executive Committee

The three workshops which informed this strategic plan were attended by representatives from the GLHEC executive committee and institutions at large. The active members during the process included:

Institution Representative	Institution Representative
Betsy Donald, Queen's University, Associate Vice-Principal (Research)	Mark Fisher, Secretary of Executive Committee, Council of the Great Lakes Region, President and CEO
Jisu Hong, University of Illinois System, Associate Vice President for Economic Development and Innovation	Brian Bauer, McGill University, Director of International Engagement
Pradeep Khanna, University of Illinois at Urbana-Champaign, Associate Vice Chancellor for Corporate Relations and Economic Development	Sandra den Otter, Queen's University, Vice Provost (International)
Bradford Orr, University of Michigan, Associate Vice President of Research	Jay Walsh, Co-Chair of Executive Committee, University of Illinois System, Vice President for Economic Development and Innovation
Charbel Moreno, University of Toronto Research, Officer for Office of the Vice President, International	Christopher Kolb, University of Michigan, Vice President for Government Relations
Julia Kulik, University of Toronto Special Projects Officer, Office of the Vice President International	Rebecca Cunningham, University of Michigan Vice President for Research
Laura Dunek, Universities of Wisconsin, Systems Associate Vice President for Academic Innovation	Alex Mihailidis, Co-chair of Executive Committee, University of Toronto, Associate Vice President – International Partnerships & Professor
Claudia Valladolid, US Consulate in Toronto, Cultural and Public Affairs	Joanna Hosa, Global Engagement Advisor, McGill University
Anny Morrobel-Sosa, Universities of Wisconsin Vice President for Academic and Student Affairs	Marissa Jablonski, Executive Director, Freshwater Collaborative of Wisconsin, Universities of Wisconsin
Diane Del Rosario, US Consulate in Toronto	

B. GLHEC MEMBER AND PARTNER



Founded in 1821, McGill University attracts people inspired by challenge and committed to shaping a better future. McGill researchers are not only recognized for their scientific and technological breakthroughs – the world’s first blood test for cancer and first Internet search engine among them – but also for examining the social, environmental, ethical, and policy impacts of business practices, technology, science, and medicine. The diverse composition of McGill’s community, with 50% of students from Quebec, 20% from the rest of Canada and 30% international, plus professors drawn from across the world, fosters an entrepreneurial and creative environment.

McGill University is on land which has long served as a site of meeting and exchange amongst Indigenous peoples, including the Haudenosaunee and Anishinabeg nations. We acknowledge and thank the diverse Indigenous peoples whose presence marks this territory on which peoples of the world now gather.

The institution is also a signatory to the Scarborough Charter on Anti-Black Racism and Black Inclusion in Higher Education.



One of the nation’s top public universities, the University of Michigan has been a leader in research, learning and teaching for more than 200 years. With one of the highest research volumes of any public university in the country, U-M is advancing new solutions and knowledge in areas ranging from the COVID-19 pandemic to driverless vehicle technology, social justice and carbon neutrality. Its main campus in Ann Arbor comprises 19 schools and colleges; there are also regional campuses in Dearborn and Flint, and a nationally ranked health system, Michigan Medicine. The university also boasts a world-renowned intercollegiate athletics program and has been the site of many important events in U.S. history, including JFK’s announcement of the Peace Corps, LBJ’s “Great Society” speech, and the clinical trials of the Salk polio vaccine. U-M’s alumni body is one of the largest in the world and includes a U.S. president, scientists, actors, astronauts and inventors.

We acknowledge that the University of Michigan resides on the ancestral, traditional, and contemporary lands of the Anishinaabeg – The Three Fire Confederacy of the Ojibwe, Odawa, and Potawatomi Nations, as well as the Wyandot Nation. In particular, the university resides on land gifted by the three Nations and the Wyandot Nation, along with many other Indigenous Nations, in the 1817 Treaty of Fort Meigs. We acknowledge the language of “gift” in the original treaty entails mutual relationships between treaty parties, respect, and obligation on the part of the settlers. We advocate for Indigenous struggles against ongoing settler-colonization and strive for a decolonized future.



Queen's University has a long history of scholarship, discovery, and innovation that has shaped our collective knowledge and helped address some of the world's most pressing concerns. Home to more than 25,000 students, the university offers a comprehensive research-intensive environment with prominent strengths in physics, cancer research, geoengineering, data analytics, surveillance studies, art conservation, and mental health research. Welcoming and supporting students from all countries and backgrounds to a vibrant, safe, and supportive community is an important part of the Queen's experience. Diverse perspectives and a wealth of experience enrich our campus and our community. A core part of our mission is to engage our students, staff, and faculty in international learning and research, both at home and abroad. Queen's University has ranked in the top 10 globally in the 2021 and 2022 Times Higher Education Impact Rankings. The rankings measured over 1,500 post-secondary institutions on their work to advance the United Nations' Sustainable Development Goals (SDGs).

Queen's University is situated on traditional Anishinaabe and Haudenosaunee Territory. To acknowledge this traditional territory is to recognize its longer history, one predating the establishment of the earliest European colonies. It is also to acknowledge this territory's significance for the Indigenous peoples who lived, and continue to live, upon it – people whose practices and spiritualities were tied to the land and continue to develop in relationship to the territory and its other inhabitants today. The Kingston Indigenous community continues to reflect the area's Anishinaabek and Haudenosaunee roots. There is also a significant Métis community and there are First Peoples from other Nations across Turtle Island present here today.

The institution is also a signatory to the Scarborough Charter on Anti-Black Racism and Black Inclusion in Higher Education.



The University of Illinois System is one of the world's top ranked public research universities and plays a major role in the region's economic vitality. The state's largest educational system contributes US\$19 billion to the Illinois economy each year. Our innovative, diverse, globally engaged citizens and leaders enrich our culture and society, create prosperity, and serve the public good. New breakthroughs from our universities foster economic growth and solve society's biggest challenges. Combined, the three universities in Urbana-Champaign, Chicago, and Springfield bring resources, capabilities, and drive that are greater than the sum of their parts—it is altogether extraordinary. We attract the nation's most talented students with hundreds of undergraduate, graduate and professional programs, many of them ranked among the best in the United States. We are the state's largest system of higher education, with more than 94,800 students. In addition to our three main campuses, the U of I System has regional campuses, the UI Health hospital and clinics, research facilities, and Extension offices throughout the state. We've carried on our land-grant mission for more than 150 years, making a lasting impact throughout Illinois and beyond the state borders.

We acknowledge that the University of Illinois System carries out its mission in its namesake state, Illinois, which includes ancestral lands of the Peoria, Kaskaskia, Piankashaw, Wea, Miami, Mascoutin, Odawa, Sauk, Mesquaki, Kickapoo, Potawatomi, Ojibwe, and Chickasaw Nations. We have a responsibility to acknowledge these Native Nations and to work with them as we move forward as a vibrant, inclusive institution.



Founded in 1827, the University of Toronto is Canada's top university with a long history of challenging the impossible and transforming society through the ingenuity and resolve of its faculty, students, alumni and supporters. We are proud to be one of the world's top research-intensive universities, bringing together top minds from every conceivable background and discipline to collaborate on the world's most pressing challenges. Our community is a catalyst for discovery, innovation and progress, creating knowledge and solutions that make a tangible difference around the globe. And we prepare our students for success through an outstanding global education rooted in excellence, inclusion and close-knit learning communities. The ideas, innovations and contributions of more than 640,000 graduates advance U of T's impact on communities across the globe. Together, we continue to defy gravity by taking on what might seem unattainable today and generating the ideas and talent needed to build a more equitable, sustainable and prosperous future.

We wish to acknowledge this land on which the University of Toronto operates. For thousands of years it has been the traditional land of the Huron-Wendat, the Seneca, and the Mississaugas of the Credit. Today, this meeting place is still the home to many Indigenous people from across Turtle Island and we are grateful to have the opportunity to work on this land.

The institution is also a signatory to the Scarborough Charter on Anti-Black Racism and Black Inclusion in Higher Education.



The Universities of Wisconsin are a premier system of public higher education serving more than 162,000 students. Awarding nearly 37,000 degrees annually, the universities are Wisconsin's talent pipeline, putting graduates in position to increase their earning power, contribute to their communities, and make Wisconsin a better place to live. Through a constellation of 13 universities statewide, the Universities of Wisconsin are a tremendous academic, cultural, and economic resource for Wisconsin, the nation, and the world.

The Native population in Wisconsin dates back centuries. Their presence in this state long predates Wisconsin statehood and the University of Wisconsin. These Native Nations have fought to maintain their sovereignty and self-determination in the face of federal policies of assimilation, allotment, and termination. Present day Wisconsin is home to 12 Native Nations, each with unique identities, heritage, strengths, and needs. They are geographically located near one of the 13 four-year UW universities and/or one of the 13 branch campuses. The University of Wisconsin Administration respects the inherent sovereignty of these Native Nations who call Wisconsin home.