Strategic Plan Report
July 18, 2017

Goal #5: Create a sustainable financial model.

The plan for creating a sustainable financial model focuses on five areas:

• Creating a plan to prioritize all programs on campus—each identified in one of four categories: academic, support, outreach, or administrative—with maximum input from the campus community and transparency in decision-making about needed changes.
• Identifying resources for Institutional Advancement to operate more efficiently and maximize stakeholder and friend support.
• Promoting alumni support for the university as a whole and, in particular, Career Services.
• Aligning the efforts of the Committee on Undergraduate Curriculum and Academic Standards (CUCAS) and the Graduate Council as outlined in the Academic Program Review Process document in the Faculty Handbook with the plan to prioritize academic programs.
• Aligning the efforts of the University Planning and Budget Committee (UPBC) with the plan to prioritize academic programs.

With regard to the first area, prioritization of programs, we recommend that this initiative be informed by Robert C. Dickeson’s Prioritizing Programs and Services, published in 2010 by Jossey-Bass. The current budget environment coupled with diminished state support for higher education requires that we manage our resources more effectively by examining our strengths, weaknesses, opportunities, and challenges from a fiscal perspective. To this end, the president will provide a projected budget number to inform this program prioritization initiative. This process would allow us to grapple with difficult decisions as a community.

While we believe it is important to outline a system that has worked at other post-secondary institutions so that the campus community will appreciate the scope of this initiative, we recommend that the final plan be developed and rolled out by an Evaluation of Programs Committee constituted and charged by the University Senate—to include faculty from each of the four schools chosen according to a process determined by the Senate—and the Office of Academic Affairs. Because the analysis of the collected data and accompanying narrative will necessitate comparison, it will be essential for all areas of the campus to be engaged in the effort simultaneously. This is a daunting proposal, but without all of the information available at once, no useful comparisons could be asserted.

We would suggest that the first step in the process to prioritize programs be to establish criteria and then determine how the established criteria would be measured. The Evaluation of Programs Committee would submit the proposed criteria and ranking for the criteria to the University Senate for review. The ranked criteria would be used by deans, vice presidents and the president to make their final recommendations about priorities, changes, and realignments. The next step would be to define what would constitute a program. Once defined, each
identified program would create a committee to produce a report with the program chair serving as the liaison to the Evaluation of Programs Committee.

This process differs from the usual Academic Program Review process in at least three ways. First, all programs on campus will be a part of the prioritization process, not just the academic programs. Second, the campus will take part in this process all at once rather than on a staggered schedule. Third, academic program review focuses primarily on quality and rigor. Program prioritization is designed to make determinations about program viability and sustainability while not losing sight of the importance of quality and rigor.

The criteria recommended for the academic programs, support programs, and outreach programs which would determine the qualitative and quantitative components for each report may include the following:

- History, development, and expectations of the program
- External demand for the program
- Internal demand for the program
- Quality of program inputs and processes
- Equipment, facilities, and other resources
- Quality of program outcomes
- Size, scope, and productivity of the program
- Revenue and other resources generated by the program
- Costs and other expenses associated with the program
- Impact, justification, and overall essentiality of the program
- Opportunity analysis of the program (essential ideas of value to the institution’s future)

The criteria for the administrative programs would be different as it would be unlikely that whole offices would be prioritized out of existence, but it would be possible for these offices to be restructured and/or realigned for greater efficiencies in terms of the whole of the administrative functions of the university. The criteria which would determine the qualitative and quantitative components for each report may include the following:

- Main objectives of unit
- Services provided by unit and to which affiliates
- Positions in the unit with description of responsibilities
- Needs and demands for services in the unit not met
- Ways university could help unit perform better
- Ways the unit relates to other units of the university
- Skill sets and resources of the unit that can be shared with other units
- Resources needed to improve services to a superior level
- Technologies available to provide better service
- Explanation of how unit could function with:
  - 10% reduction in staff
  - 20% reduction in staff
  - 30% reduction in staff
10% reduction in nonpersonnel resources
20% reduction in nonpersonnel resources
30% reduction in nonpersonnel resources

We would recommend that the Evaluation of Programs Committee be responsible for the following:

- Framing questions to be answered which speak to the criteria. This exercise would serve to have the campus community approach the criteria in similar ways.
- Establishing page limits and formats for the reports to bring a sense of consistency and fairness to the process.
- Creating a web page about the process to communicate important information and to serve as one way to receive feedback about steps in the process.
- Identifying two programs from each of the four areas—academic, support, outreach, and administrative—to pilot writing the report for review by the Evaluation of Programs Committee to see if the process would need to be refined before establishing the timeline for the campus to complete the first stage of the process.
- Creating timelines for completion of reports, stages of analysis, campus conversations, decision-making, and implementation.
- Producing a plan for University Senate review.

Once the reports have been created, they would be presented to the deans and directors for the first stage of analysis. With those priorities established, the provost and the vice presidents would provide the second stage of analysis with regard to programs within their purview to understand the priorities in a larger universe. The final stage of analysis would be conducted by the president in concert with the Strategic Plan Implementation Committee, the membership and charge of which has been discussed earlier in this plan. These discussions would result in the final level of prioritization, with all of the programs on campus under review. These recommendations would be shared with the campus, in particular with CUCAS and/or Graduate Council regarding academic programs, for reaction and comment. With that information in hand, final decisions would be made by the president and implemented accordingly.

It is recommended that the Evaluation of Programs Committee and the Strategic Plan Implementation Committee work together to determine when the implementation phase would be revisited to understand the effectiveness of the changes and the ramifications of any unintended consequences.

The second area of the model to create a sustainable financial model focuses on Institutional Advancement. The following initiatives are recommended to be completed by fall 2018:

- Increase the percentage of valid e-mail addresses for alumni and other constituents by 25% of total alumni and by 25% of existing constituents to promote student success stories and build affinity.
- Increase the total number of donors by 10%.
• Develop a strategy to increase participation of community members and partners in the life of the campus.
• Systemize community member contact and critical background information in the fund-raising database by 15%.

The third area of the model concentrates on redesigning the functions of Alumni Relations to have alumni interacting with current students to enhance the mission of the university.

The fourth area of the model reinforces the role of CUCAS and Graduate Council in the Academic Program Review Process and encourages this role to be a part of the plan to prioritize academic programs.

The fifth and final area of the model encourages the University Planning and Budget Committee (UPBC) to align its efforts with the plan to prioritize academic programs. To explain, new academic programs, after a designated amount of time, would be required to present at UPBC their achievements in terms of hitting projected enrollment numbers.