2014 Strategic Plan Development Team

Immersion Toolkit
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Opportunity and Competitiveness for the Region:

Portland State University Strategic Plan 2011-2014

Introduction

When World War II ended in 1945, the surge of returning veterans triggered demand for greater opportunity for higher education in Portland, Oregon. The result was an institution called Vanport Extension Center, which was established in 1946 in Vanport City, a community hastily erected on the northern border of Portland to house wartime shipyard workers. Today that tiny extension center has become Portland State University (PSU), Oregon’s only public urban research university. With nearly 30,000 students from all 50 states and 93 foreign countries, it is the state’s largest and most diverse higher education institution.

Now located on a 50-acre campus in the heart of Portland, PSU has grown not only in size, but also in reputation. The university is widely perceived as a national model for how student-focused urban research universities can partner with their cities to solve problems and improve the quality of life. It is strongly identified with sustainability education, research and practices. And it has begun increasingly to attract high-achieving high school graduates interested in its “high-caliber teaching, urban setting, diverse student body and post-graduate opportunities.” National ranking organizations are taking note. In 2011, PSU became the second public university in Oregon to be selected by The Princeton Review as one of the nation’s “Best 376 Colleges,” a listing of what the Review calls “the crème of the crop institutions for undergraduates in America.”

Recognition of this sort suggests Portland State is making progress toward achieving its vision to become “an internationally recognized urban university known for excellence in student learning, innovative research, and community engagement that contributes to the economic vitality, environmental sustainability, and quality of life in the Portland region and beyond.” Newly adopted legislation which converts the state’s public university system from a state agency to a free-standing public university system should accelerate the process by allowing PSU to manage operations more efficiently, control costs, and invest tuition to meet university needs rather than having it be diverted to meet other state purposes.

Unfortunately, the single greatest impediment to achievement of PSU’s long-term goals – a severe lack of funding – is not resolved by this structural change. State funding for Portland State has declined dramatically in real dollars over the past two decades and now accounts for only approximately 13 percent of total annual operating revenue, compared to 48 percent twenty years ago. Students and their families have begun to shoulder an increasingly large percentage of the cost of education. Even so, PSU

2 University of Oregon is the only other Oregon public university to make the Best 376 list.
4 http://www.leg.state.or.us/11orlaws/sess0600.dir/0637.pdf.
finds itself with a growing funding gap that constrains its ability to meet its goals of preparing students for the jobs of the 21st century, recruiting and retaining excellent faculty and staff, upgrading infrastructure and developing collaborative initiatives to promote economic development and enhance the livability of the Portland metropolitan region.

“Opportunity and Competitiveness for the Region: Portland State University Strategic Plan 2011-2014” reaffirms PSU’s current strategic vision and establishes strategic goals and objectives for the next three years to advance that vision. Included are strategies for securing the resources that will be necessary to accomplish the substantive aspects of the plan.

Mission

The mission of Portland State University is to enhance the intellectual, social, cultural and economic qualities of urban life by providing access throughout the life span to a quality liberal education for undergraduates and an appropriate array of professional and graduate programs especially relevant to metropolitan areas. The university conducts research and community service that support a high quality educational environment and reflect issues important to the region. It actively promotes the development of a network of educational institutions to serve the community.

The Vision

PSU’s vision is to become a leading public urban university “known for excellence in student learning, innovative research, and community engagement that contributes to the economic vitality, environmental sustainability, and quality of life in the Portland region and beyond.” In a June 2011 letter to PSU faculty and staff, President Wiewel reaffirmed this vision, saying the university must aspire not only to provide an excellent education for students but to “serve as a model for the urban university in the 21st century – a place where campus and community are inextricably linked, and where we can find solutions to the seemingly intractable challenges that face societies locally and globally.”

In order to operationalize the vision, university leaders in 2008 established strategic priorities – or guiding themes – for the university that are consistent with the overarching strategic directions of the State Board of Higher Education. These priorities include: 1) provide civic leadership (through strategic partnerships and innovative research), 2) improve student success, 3) achieve global excellence, 4) enhance educational opportunity and 5) expand resources and improve effectiveness. Specific goals, Objectives and outcomes related to these priorities were also established, as outlined in University Planning 2009-2010. The goals and objectives were updated during leadership planning retreats in Spring 2010 and 2011. The goals and objectives identified during the Spring 2011 retreat are reflected in this plan.

Environmental Assessment

5 http://www.pdx.edu/mission.html.
6 Wim Wiewel, e-mail to all campus mailing list. June 20, 2011.
7 Board strategic directions include: 1) Increasing the education attainment of Oregonians; 2) high quality student learning; 3) conducting innovative research that contributes to Oregon, and 4) contributing to the civic and economic well being of Oregon communities.
Strategic Plan Development Team Toolkit

National

The social, cultural and economic benefits of high educational attainment have been well documented. The better educated a population, the lower the unemployment, crime, welfare and incarceration rates and the higher the health status and sense of well-being. Highly educated individuals vote more often, give to the arts more frequently and become more engaged in the life of their community. Educational attainment also has been shown to financially benefit both individuals and the larger community. Studies show that a full-time worker with a four-year college degree will earn 60 percent more over his working life than will a high school graduate.9 And estimates by Oregon economist Joe Cortright suggest that the local economy stands to gain $1.6 billion annually for every one-percent increase in the number of two- and four-year degrees earned by individuals under 25.10

As American higher education moves into the second decade of the 21st century, however, it finds itself facing unprecedented challenges. With large numbers of Americans unemployed, tax revenues down and the federal debt soaring, Congress has made tens of billions of dollars in reductions to education programs, including more than $30 billion in student financial aid alone. Faced with their own unemployment and revenue challenges, governors and legislatures are responding similarly, with some $5 billion in cuts to colleges and universities nationwide approved or under consideration. And the economic equalizer of the past two decades – increases in tuition – may have lost its elasticity. Annual tuition increases of as much as 30 percent, coupled with student loan debt which exceeds that of credit card debt,11 have led to student protests on campuses around the country.

In the face of this, articles in The Atlantic, The New York Times, The Washington Post and other publications are now challenging whether higher education provides the long-touted financial returns on investment for individuals – or society. Parents frustrated with the high costs of a higher education, particularly at more selective universities, are quoted in those publications as saying they are not convinced the return is worth the investment.12 A Pew Research Center poll conducted in spring 2011 suggests students disagree, however. A majority of college graduates surveyed said college was valuable for them personally, leading to $20,000 more in annual income. The majority also reported they had matured, grown intellectually, and were better prepared for a job or career because of their college experience.13

Pacific Northwest

The Pacific Northwest is dominated by public universities with a small number of top-tier private colleges, and a host of lesser-known private colleges and universities. There are also two first-class medical schools and academic health science centers, University of Washington School of Medicine and Oregon Health & Science University, and an extensive public community college system. Within this

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13 http://pewsocialtrends.org/2011/05/15/is-college-worth-it/.
crowded field, Portland State occupies a unique niche as the only large, comprehensive, public, urban, research university. The type of practical higher education experience, with associated research and service components, offered by such urban-serving schools is becoming increasingly attractive to students and to potential partners, as the population of the United States and the world continue to become more urbanized, and as more of the nation’s and world’s problems lend themselves to urban solutions.

The Pacific Northwest is also known for its economic and cultural dependence on natural resources and its residents’ affinity for their local environment, both urban and rural. Thus research and teaching agendas throughout the region tend to emphasize ecological, social science, resource management, health care, and economic transformation issues. Portland State’s emerging research profile has strong overlap with this set of opportunities.

Oregon

In June 2011, the Oregon Legislature adopted legislation (SB 253) calling for substantial improvement in the educational attainment of Oregonians over the next 14 years. If that legislation is implemented as designed, by 2025 some 40 percent of adult Oregonians would have a bachelor’s degree or higher, an additional 40 percent would have an associate’s degree or post-secondary certificate and the remaining 20 percent would have a high school diploma or the equivalent.

The need to establish such a policy is clear. Despite rapid globalization and increased competition for jobs that require more than a high school education, only 30 percent of Oregonians have a bachelor’s degree or higher and 9 percent an associate’s degree. Ten percent of Oregonians do not have even a high school diploma. The rapid increase in the number of Latinos in the state’s elementary and secondary schools provides an additional challenge. Latinos, who historically have had the lowest educational attainment of any racial/ethnic group in Oregon, made up 14 percent of students in the 12th grade in Oregon public schools in 2008-2009, double the proportion in 1998-1999. By 2019-20, 22 percent of 12th graders in the state is expected to be Latino.

While the need for the “40-40-20” plan is clear, how it will be paid for is not. The same month the Legislature set the new goal, it reduced funding for Oregon’s seven public universities by 17.7 percent, a continuation of a decades-long erosion in public funding which has left Oregon ranked 47th in the nation for higher education funding per student. The inconsistencies in the two actions led some longtime supporters of higher education to vote against SB 253, arguing that if the state was serious about improving the educational status of Oregonians it should significantly increase – not decrease – funding for higher education.

This type of disconnect between expectations and funding is not new for Oregon higher education. Oregon General Fund revenues are notoriously volatile and over-subscribed. Ballot measures such as the property tax limitation (Measure 5) in 1990 and numerous public safety measures have tied up significant

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14 Although the University of Washington is located in Seattle, it considers itself to be a globally focused institution, with relatively few programs that link it directly with the city of Seattle.

portions of state tax revenues. As a result, many traditional recipients of state funding have gone wanting – especially higher education.

When faced with limited state resources during the 1990s, Oregon’s public universities responded by reducing access for students. Realizing that approach had contributed to falling state educational attainment levels, the universities reversed course in the 2000s. In 2010-2011, the seven universities collectively enrolled 96,960 students, an increase of almost 20,000 in just a three-year period. The burden of paying for these educational services did not fall predominately on the state, however. Students and their families absorbed two-thirds of the cost, while the state covered only one-third – exactly the inverse of how higher education was paid for in Oregon 20 years earlier.

Ensuring quality higher education services are available to Oregonians at a cost they can afford will require both structural and funding changes. The structural change is already underway, thanks to legislative approval of SB 242, the bill that provides the universities with significant autonomy and flexibility to manage their finances and operations. Further structural change, as well as a more systematic approach to investments across the educational continuum from pre-K through college, is expected as part of an initiative Governor John Kitzhaber has said he will submit to the Legislature in February 2012.

Portland

With a strong public transportation system, a commitment to sustainability and easy access to green spaces, Portland is widely considered one of the nation’s most livable and progressive cities. A reputation for high quality restaurants, bookstores and art galleries, a lively music scene, friendly and civically involved citizens and a short drive to beaches and mountains round out the picture of Portland as an attractive destination for young people and eco-friendly businesses.

As with the Pacific Northwest generally, the Portland area offers numerous public and private education opportunities from Pre-K through the post-graduate level. Elementary and secondary schools are spread throughout the city, providing easy neighborhood access. Community colleges are also readily accessible in the central city and suburbs. PSU, a handful of private and proprietary schools and OHSU complete the educational offerings.

Despite its positive attributes, Portland faces a number of challenges. A report released in December 2010 found that Portland lags behind comparable cities such as Seattle, Denver and Minneapolis in wages, per capita income, investment income and private sector job creation. Poverty and racial disparities are also of concern in the Portland region. More than 17 percent of the children living in the most populous metropolitan county live in poverty. According to a study by PSU’s School of Social Work, people of color in the county are even more likely than their white counterparts to experience poverty as well as unemployment, low birth-weight, juvenile detention and foster care.

K-12 education statistics – and funding - in Portland also are problematic. Only 53 percent of high school students complete their degree in four years.\textsuperscript{18} Graduation rates for students of color are particularly stark, with only 31 percent of Hispanic students and 44.5 percent of African American students in the city completing their degrees on time.\textsuperscript{19} Continued reduction in state funding – Portland Public Schools’ share of state funding has decreased by approximately 6 percent over the past two biennia – decreases the odds that these statistics will improve any time soon.

Portland State benefits from the city’s progressive reputation, attracting students interested in sustainability, a vibrant, urban setting and the opportunity to interact with business, nonprofit and civic organizations while still in college. As such, it is appropriate that PSU seeks not only to provide those students with a high-quality education that prepares them to compete in the global marketplace, but also to work collaboratively with the city and the region to develop innovative solutions to the social, economic and educational challenges area citizens encounter.

\textit{Portland State University}

The funding and structural challenges that face all of Oregon’s public universities are particularly acute for PSU. Located on the south end of downtown Portland, PSU is the newest of the state’s three major universities, with 65 years of history compared to 143 years and 135 years, respectively, for Oregon State University and the University of Oregon.

During its early years, Portland State faced an uphill battle just to survive in the face of opposition from critics who didn’t believe Oregon needed another public university. Today, PSU has nearly 30,000 students, making it the largest university in the state and one of the 100 largest higher education institutions in the United States. Although 66 percent live in the Portland metropolitan area and another 14 percent are from other parts of Oregon, students come to the university from every state and from 93 foreign countries. Students represent a wide range of ages, economic backgrounds and ethnicities, making PSU Oregon’s most diverse university.

Historically a teaching university, PSU’s level of sponsored research has climbed sharply in recent years, up from $40 million in FY 2006 to more than $63 million in 2011. Its role as regional economic engine is also expanding. The university employs 5,000 faculty, staff and student workers and pays out nearly $240 million in payroll annually.\textsuperscript{20} In FY 2010, PSU purchased $216 million in goods and services from business and organizations, generated more than $518 million in additional spending and had an estimated $1.4 billion economic impact on the region.

Portland State’s most widely recognized role is as an anchor institution in the Portland Metropolitan area – an engaged university that combines rigor in the classroom with field–based experiences such as internships and classroom projects with community partners. In 2010, more than 10,000 students were engaged in at least 20 hours of community-based learning. In total, PSU students provided more than 1.54 million service hours to businesses, nonprofits and government organizations that year – an overall

\textsuperscript{18} http://www.oregonlive.com/education/index.ssf/2011/04/oregon_school_dropout_rates_we.html.
\textsuperscript{19} http://www.portlandpulse.org/node/70.
\textsuperscript{20} Portland State University, “$1.4 billion and growing: The Economic Impact of Oregon’s Urban Research University.” January 2011.
value of $29 million to the community and an opportunity for the students to apply classroom theory to real life situations. This type of practical experience allows the growing number of Portland State graduates – last year’s class of 5,620 was the largest in state history – to enter the workforce better prepared. It also serves as one avenue for PSU to participate in solving urban problems.

Despite its impressive growth – and, in some cases, because of it – PSU faces numerous challenges. With funds for operations severely limited, the number of faculty and staff has not kept pace with increases in student enrollment, leaving both employee groups stretched thin. Faculty and staff also have gone several years without significant salary increases. A long-term staffing and compensation plan will be essential to ensure the university has the talent in place to achieve its long-range goals.

Information technology systems also need upgrading and investments must be made in research infrastructure, human resource data management, staff training and other management and communications systems. Although student retention rates have improved recently, new processes and procedures are needed to ensure students receive the support they need to succeed.

The physical plant is inadequate. With 85 percent of the university’s buildings more than 25 years old, many of the facilities are in dire need of renovation and modernization. In all, the campus has a total $272 million of backlogged deferred maintenance and only $3.2 million in state funds to spend for this purpose over the upcoming biennium.

In addition, the campus has significant expansion needs. According to the 2010 University District Framework Plan, PSU has an immediate need for approximately 430,000 additional net assignable square feet to address current classroom, lab, and housing and office space shortages. With area population growth estimates suggesting PSU’s enrollment will increase to between 36,000 and 50,000 over the next 20 years, the plan will have to find an additional 4.2 million gross square feet of space to meet housing, enrollment and research needs.

Access to adequate funding is the single biggest limiting factor for PSU in addressing these challenges. With state funding covering only approximately 13 percent of the total budget, the university has been forced to raise tuition and look to creative partnership arrangements and philanthropy to help fund its operations. PSU will need to increase the amount of funds it receives from these sources, as well as looking to new resources, if it is to meet its goals moving forward.

**Details of the Strategic Plan 2011-2014**

The strategic priorities and goals outlined in this strategic plan are based on a three-year timeframe. The overarching goal for PSU during that time period is to make substantial progress toward becoming the model university of the 21st century that President Wiewel outlined in his June 2011 letter – a university that exemplifies educational excellence and student success, a place where campus and community are inextricably linked, and an environment that fosters development of innovative solutions to the difficult challenges that face societies locally and globally. To that end, the plan sets specific goals for student retention and graduation, diversity training and internationalization, and research growth and

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development. It also outlines specific strategies to enhance faculty and staff support and engagement, raise the university’s profile among the general public and policymakers and build a university-wide culture of philanthropy.

Objectives outlined in the plan are for the 2011-2012 academic year, except as otherwise indicated. The Objectives will be updated annually. New goals may also be added – or existing ones altered – as deemed appropriate.

The majority of the Objectives for 2011-2012 will be implemented by current staff utilizing current resources. Where significant new resources are needed to implement an objective/action, the plan will so indicate.

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Priority/Theme 1: Provide Civic Leadership Through Partnerships: Lead as civic partner, deepen our engagement as a critical community asset, demonstrate leadership in regional innovation and serve as an anchor institution in the Metro area.

Portland State is best known as a university deeply involved in issues of concern to the city and region in which it is located. As the “Saviors of our Cities” survey reported in 2009, PSU is among a select group of universities that “have demonstrated...long-standing cooperative efforts with community leaders to rehabilitate the cities around them, to influence community revitalization and cultural renewal, and to encourage economic expansion of the local economy, urban development and community service.”22 For PSU, this involvement is not merely about service; rather it is “the integrating principle for the institution’s teaching and scholarship activities” as well as its community service.23

The 2011-2014 Strategic Plan challenges PSU to build on its already strong reputation as an engaged university by assuming a leadership role in bringing stakeholders together to prioritize needs, conduct research and develop innovative solutions to local and regional problems. Once developed, those solutions could be exported nationally and internationally.

Specific strategic goals and objectives in this area include:

Goal 1.1: Assume a leadership role in partnering with business, governments and community organizations to identify, develop and implement innovative solutions to societal challenges, with a focus on those of particular concern to the urban area.

PSU’s motto, “Let Knowledge Serve the City,” reflects the university’s commitment to an exchange of knowledge and resources with local, regional, national and global partners that foster actions, programs, scholarship and research that are globally relevant and regionally focused. In practice that has resulted in hundreds of initiatives in which the university has worked collaboratively with businesses, nonprofits and local and regional governments to research and develop sustainable transportation alternatives, identify approaches that can help ensure students

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23 http://www.pdx.edu/oaa/frequently-asked-questions.
graduate high school and come to college ready to learn, and assess and develop ways to address public health needs, racial disparities and other issues facing the metropolitan area. This goal calls for the university to assume an even greater leadership role in bringing partners together to find innovative solutions to problems of this nature.

Objectives

1.1.1 Enhance effectiveness of university partnerships by inventoring existing partnerships; clarifying relationship between Center for Academic Excellence and Partnerships and Office of Strategic Partnerships; and establishing process and criteria for selecting or initiating future university-wide strategic partnerships

1.1.2 Build-out strategic partnership frameworks, including action plans in four key areas:
   - Regional Economic Development (industry clusters, entrepreneurship, innovation)
     (see also Goal 1.2 below)
   - Urban Sustainability (built environment and ecosystem services)
   - Urban Sustainability (education and social services)
   - Health and Life Sciences (OHSU and health care providers)

1.1.3 Form university-wide interdisciplinary task forces for each strategic partnership and establish communication and evaluation processes to publicize and measure the success of the partnerships

**Goal 1.2:** Given continued high unemployment and other economic challenges in the Portland metropolitan area, place particular emphasis on working with regional stakeholders to develop and implement strategic initiatives that will promote regional economic development.

In supporting development of an urban renewal district centered around Portland State, Portland Mayor Sam Adams described the university as “a leading engine of economic growth, prosperity and opportunity.”

24 The city’s major business organization, the Portland Business Alliance, similarly acknowledged the university’s role as a workforce developer and economic engine in its 2011 Action Plan, saying it will “support the growth of PSU…in a manner that leads to increased innovation, business spin-offs and job growth due to research and development activities.”  

25 This goal calls for the university to increase its activities in this area and assume a leadership role in helping spur innovation and economic growth.

Objectives

1.2.1 Expand collaboration with PDC, TriMet, Greater Portland, Inc. and other organizations involved in regional economic development policy

1.2.2 Develop and implement strategic research partnerships with PGE, Intel, CH2M-HILL and other businesses/industries identified as target growth industries, or economic

development clusters, by PDC. These include clean-tech/sustainable industries, active wear, software and advanced manufacturing

1.2.3 Secure approval by city and county government of an Urban Renewal District centered around PSU

1.2.4 Work with stakeholders to improve policies and procedures for engaging minority, women and emerging small businesses

**GOAL 1.3: Enhance PSU’s collaborations with OHSU, community hospitals and health and bioscience businesses/organizations to foster economic development, improve efficiencies and improve health status in the metropolitan area and throughout Oregon**

In Fall 2010, PSU entered into a Strategic Alliance with Oregon Health & Science University that is bringing researchers, teaching faculty and administrators of the two institutions together to look for ways to develop innovative research, improve educational offerings for Oregonians and make the best use of limited resources. Two key initiatives include development of a collaborative School of Public Health and completion of a Life Sciences Building in Portland’s South Waterfront area that will co-locate researchers, educators and students from both institutions. PSU is also working with OHSU, other health care organizations and the bioscience industry on commercialization efforts in health and science fields. This goal focuses on continuing to grow partnerships in this important area.

**Objectives**

1.3.1 Continue to implement OHSU-PSU Strategic Alliance with particular near-term focus on establishment of a collaborative School of Public Health and completion of the Life Sciences Building *(requires additional resources)*

1.3.2 Leverage bioscience capacity at the PSU Business Accelerator and other such facilities

1.3.3 Continue coordination of OHSU and PSU administrative processes and procedures

1.3.4 Increase joint recruiting of strategic faculty members

1.3.5 Assemble funding to support research collaborations involving OHSU and PSU faculty

1.3.6 Explore joint degree programs across the two universities

**Priority/Theme 2: Improve Student Success:** Ensure a student experience that results in higher graduation rates, retention, satisfaction, and engagement.

As Portland State has grown and expanded over the years, so has its reputation among students. When asked why they had selected PSU, high school valedictorians who enrolled as freshmen in Fall 2010 said they came for PSU’s “high caliber teaching, urban setting, diverse student body and postgraduate
opportunities. Students interviewed for The Princeton Review’s “Best 376 Colleges: 2012 Edition” described PSU as offering “a great learning environment in the heart of the city” and as being a university that is “training students to be good community members.” They also praised their professors as “well-educated (and) well-versed in current issues and research,” “easily accessible” and “prepared and passionate about the classes they teach, with a wealth of experiences to bring to the classroom.”

Despite these encouraging statements, PSU still has work to do to ensure students are successful and will persist through college to graduation. Retention rates of transfer students are strong (80 percent for juniors and 76.3 percent for sophomores), an important statistic given that transfers make up two-thirds of undergraduates who matriculate to PSU each year. Retention of first-time, full-time freshmen lags behind, however, barely topping 70 percent (70.3) in Fall Term 2010. Moving forward, PSU will focus on improving retention and the overall student experience through development of a strategic enrollment management system as well as special efforts targeted at particular cohorts, including the growing population of Latinos and students who have stopped-out or are at risk of doing so with only a term or two left to complete their degrees.

**Goal 2.1: Develop and implement a five-year strategic enrollment management plan that supports the academic and fiscal goals of the university**

While overall student enrollment at PSU has steadily increased over the past decade, careful and strategic enrollment planning has not been utilized by the university. To improve retention and graduation rates, and meet the goals of the state's new 40-40-20 plan, Portland State must become more intentional about the number and characteristics of the students it enrolls and the strategies it employs to ensure those students can be successful. To achieve this goal, PSU will:

**Objectives**

2.1.1 Develop a five-year Strategic Enrollment Management (SEM) plan that supports the academic and fiscal goals of the university

2.1.2 Create a new Department of Enrollment Management and Student Affairs with a division of Enrollment Management that includes the current offices of Admissions, Records, Registration, Financial Aid, Scholarships, and Enrollment Management Communication Technology

2.1.3 Hire a new Associate Vice President for Enrollment Management

2.1.4 Establish an Enrollment Management cabinet to inform and oversee the SEM plan

**GOAL 2.2: Increase nonresident enrollment to 2,200 for international students and 4,325 for domestic non-resident students by 2013**

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26 [http://www.pdx.edu/insidepsu/top-students-valedictorians](http://www.pdx.edu/insidepsu/top-students-valedictorians).
28 Based on Fall Term 2010 statistics.
In order to improve diversity, enhance internationalization of the campus and respond to other strategic enrollment needs, PSU has worked over the past several years to recruit more international and domestic non-resident students to the university. These efforts have realized some success, increasing the population of international students from 1,698 in 2008-2009 to 1,859 in 2010-2011, and the number of domestic non-resident students from 3,575 in 2008-2009 to 3,791 in 2010-2011. Additional focus needs to be brought to this area, however, to meet diversity, internationalization and strategic enrollment management targets. Although specific targets/initiatives may be adjusted once the 5-year enrollment plan is in place, PSU will take initial steps to:

Objectives

2.2.1 Significantly enhance targeted international and out-of-state recruitment initiatives 
(requires additional resources)

2.2.2 Increase strategic communication with prospective non-resident students via new Customer Relations Management System

2.2.3 Target remission awards and other enrollment incentives to non-resident students

2.2.4 Establish additional 2+2 educational agreements with overseas partners in China

2.2.5 Establish new co-admission and transfer agreements with out-of-state community college partners

2.2.6 Pilot use of international agents

GOAL 2.3: Increase retention rate for first-time, full-time freshmen to 75 percent by 2013

Improving the first-time, full-time freshmen retention rate is a very high priority for PSU. During the past three years, a portfolio of student success initiatives, including recommendations by the First Steps to Student Success Committee, have been strategically implemented to improve this metric. Several of these efforts, such as mandatory new student orientation and enhanced academic advising have yielded positive results. To further increase the numbers of first-time, full-time freshmen returning for sophomore year, PSU will continue to implement the recommendations of the First Steps to Student Success and Retention Committee approved by the Provost. Specific actions include:

Objectives

2.3.1 Complete implementation of math placement testing and tighten enforcement of pre-requisite requirements

2.3.2 Reduce DWF rate by redesigning two high-enrollment and high-failure courses (requires additional resources)
2.3.3 Implement prescriptive degree maps and degree-map milestone tracking

2.3.4 Implement Phase II of advising initiative \((\textit{requires additional resources})\)

2.3.5 Implement enhanced peer mentoring and academic coaching activities throughout campus

2.3.6 Implement student financial literacy programs and intervention initiatives for student experiencing financial difficulties

**Goal 2.4: Expand and improve assessment activities in line with best practices to improve student learning and meet accreditation expectations**

Continuous improvement of student learning requires ongoing assessment to ensure quality. Assessment also allows the university to demonstrate the added value of our educational products to students and external stakeholders at a time of increasing emphasis on accountability. PSU has led in assessment, but in recent budget cycles, has lost ground in terms of FTE dedicated to assessment activities. This trend must be reversed to enhance student learning and to ensure proper reporting of findings to the Northwest Commission on Colleges and Universities, the institution-wide accrediting agency for PSU, and other interested parties.

**Objectives**

2.4.1 Hire 1.0 FTE Assessment Associate into CAE \((\textit{requires additional resources})\)

2.4.2 OIRP, IAC and writing faculty consultants to develop and pilot a product to assess junior and senior writing samples

2.4.3 Ensure each department has defined unit-level outcomes and increase the number of departments collecting program level assessment data on at least one learning outcome

2.4.4 Establish a process and goals for assessing graduate programs

2.4.5 Institutional Assessment Council to implement CWLO communication plan \((\textit{requires additional resources})\)

**Goal 2.5: Increase campus engagement and satisfaction for students**

Educational research has shown that on-campus engagement and satisfaction are important contributors to student success, retention and graduation. To increase on-campus engagement and satisfaction for students, PSU will improve strategic communication and partnerships with students. Specific actions include:

**Objectives**

2.5.1 Increase communication to students via new CRM, social media and My First Quarter website
2.5.2 Expand living and learning communities within on-campus housing and explore feasibility of increasing the amount of on-campus housing. *(requires additional resources)*

2.5.3 Conduct a feasibility study for a new or upgraded student union

2.5.4 Expand student activities and co-curricular opportunities

2.5.5 Enhance peer-to-peer mentoring activities to maximize impact on student success

2.5.6 Systematically provide academic progress data to units to encourage data-driven curricular planning and early and appropriate student success interventions *(requires resources)*

2.5.7 Conduct study of graduate student advising *(requires additional resources)*

**Goal 2.6: Produce graduates who can succeed and be leaders in a global community**

Students attending college today will face an increasingly competitive global economy upon graduation. With more and more work accomplished with the aid of computers or outsourced to cheaper labor markets, the economic advantage will be to those who can analyze and solve problems, recognize patterns and similarities and communicate and interact with other people from all over the world. For PSU students to compete in this environment, they will need to be proficient in at least one language other than their own and be exposed to other cultures, both domestically and internationally. They will also need to be knowledgeable about world events and have an appreciation for how those events affect local issues, and vice versa.

**Objectives**

2.6.1 Expand opportunities for culture and language learning across the curriculum

2.6.2 Prepare all students as globally responsible citizens by providing opportunities for global and intercultural engagement

2.6.3 Enhance university IT systems to allow expanded and more rapid communication between PSU students and communities and students worldwide *(requires additional resources)*

**Priority/Theme 3: Achieve Global Excellence:** Distinguish the institution nationally and internationally through the accomplishments of its faculty, the reputation of its academic and research programs and the preparation of its students for a diverse and global economy.

As the only comprehensive public research university in Oregon’s most populous metropolitan area, Portland State has a responsibility to prepare its students to compete in an increasingly global economy
and to generate evidence-based, transformational ideas for improving the conditions of cities and the people who live in them. To achieve that goal, the university must partner closely with the metropolitan region to codify, improve and export best practices where they exist and to find innovative solutions to problems that remain intractable – such as continued disparities in health, economic and educational status among various populations, or the escalating rise of carbon emissions. Ultimately, PSU’s goal is to link its research so inextricably with the Portland region that both entities are branded as top sources of knowledge for improving the efficiency, economic competitiveness, quality of life and sustainability of the urban experience locally, regionally, nationally and internationally. That leadership role also extends to creating an on-campus environment that is welcoming, inclusive and increasingly diverse.

Goal 3.1: Expand innovative research and graduate education by leveraging connections between local application and global relevance

PSU has engaged faculty and students who are responsive to community needs. At the same time, Portland Metropolitan area and Pacific Northwest citizens and leaders are eager for innovative solutions to ongoing problems. Working in this collaborative environment, university faculty have become adept at developing new ideas about how urban systems function and interact with the natural environment that sustains them. The resulting novel approaches to managing economic, social, and ecological systems can be applied globally with appropriate modifications necessary to accommodate local conditions. Similarly, fundamental scientific discoveries in PSU laboratories influence the advancement of science and technology worldwide.

Objectives

3.1.1 Inventory existing examples of links between metropolitan Portland-based applications and global relevance to further define these connections and identify what works

3.1.2 Provide the infrastructure and research administration support necessary for all research-active faculty to find research opportunities, submit proposals, and manage research projects efficiently and effectively (requires additional resources)

3.1.3 Identify and invest in new faculty lines, laboratories, and other facilities in research areas that build on current strengths, represent areas where PSU enjoys a strategic advantage and are in disciplines where future opportunities are likely (requires additional resources)

3.1.4 Increase opportunities for undergraduate students to become involved in research (requires additional resources)

3.1.5 Continue to clarify roles and responsibilities of Research and Strategic Partnerships (RSP) in relationship to the rest of the university

Goal 3.2: Establish PSU as a recognized regional resource for globally relevant research, practice, and education in sustainability
PSU established one of the first doctoral programs in Environmental Science in 1969 and continues to be a regional leader in this field. PSU has also participated in the more recent appearance of sustainability as a conceptual melding of environmental, social and economic priorities. Creating an educational, research, and practical focus on this hybrid field requires a broader institutional commitment to interdisciplinary collaboration. Portland has a unique, participatory culture that allows for thorough examination and adoption of sustainable practices. But it also has lagging economic indicators. Finding solutions that protect environmental and social values while expanding economic opportunity is one of society’s greatest challenges. The Miller Foundation award provides an impetus for further advancement of sustainability in Portland. By practicing as well as studying sustainability with simultaneous critical self-assessment PSU can become recognized as a global leader in this emerging field.

Objectives

3.2.1 Enhance PSU’s reputation as a leader in sustainability by inventorying and publicizing current examples of globally relevant research, practice, and education in sustainability

3.2.2 Develop a strategic plan that clarifies roles and relationships of ISS, OAA, FADM and RSP and supports and encourages sustainable policies and practices for campus operations

3.2.3 Support development and enhancement of teaching sustainability across the curriculum

3.2.4 Increase the regional and national visibility of PSU’s role in sustainability research by participating in development of the Oregon Sustainability Center

Goal 3.3: Establish an environment at PSU that is welcoming, inclusive and diverse

In announcing the hiring of the university’s first Chief Diversity Officer in Summer 2010, President Wim Wiewel remarked that the position had been created “because as a society and as an institution, we all still have much to learn about how we practice and live diversity.” That sentiment drives efforts at PSU to improve the cultural competency of faculty, staff and students and ensure that the learning and working environment at the university is welcoming, inclusive and diverse.

Objectives

3.3.1 Complete and implement Diversity Action Plan (requires additional resources)

3.3.2 Implement Year Two objectives of “Strategy for Comprehensive Internationalization 2010-2015” (requires additional resources)
3.3.3 Increase opportunities and incentives for faculty and staff to become involved in teaching, community-engagement and research in other countries and with under-represented communities in the US \((\text{requires additional resources})\)

3.3.4 Increase opportunities for faculty, staff and students from other countries to spend time at PSU \((\text{requires additional resources})\)

3.3.5 Develop and implement mandatory multicultural training for faculty and staff \((\text{requires additional resources})\)

3.3.6 Implement Year Two objectives of Exito initiative

**Goal 3.4: Recruit and retain cross-culturally sophisticated faculty, staff and students**

While PSU is the most diverse public university in Oregon, many populations are still under-represented among faculty, staff and students. This is a problem not just of recruitment, but also of retention.

**Objectives**

3.4.1 Develop a plan for strategic recruitment locally, nationally and internationally designed to increase diversity among faculty, staff and students \((\text{requires additional resources})\)

3.4.2 Develop and market a distinctive global identity for Portland State University built on the university’s international assets, its unique urban location and its global aspirations \((\text{requires additional resources})\)

3.4.3 Include respect for diversity as an essential element in job descriptions and annual evaluations for all employees and leadership in promoting diversity within their unit and university-wide for all managers

**Priority/Theme 4: Enhance Educational Opportunity: Ease the transition and create more effective pathways for students to move from K-12 to higher education.**

With only 30 percent of Oregonians 25 and older having earned a bachelor’s degree or higher and 10 percent failing to complete high school, Oregon is an example of a state where greater focus is needed on educational attainment. PSU’s goal is to be a leader in that effort, not only by working to improve retention and graduation rates for its students, but also by collaborating with its K-12 partners and other stakeholders to ensure middle and high school students aspire to a college education and come to college prepared to learn. A multifaceted approach has been developed to address both of those challenges.

**Goal 4.1: Work with community partners to create a seamless, efficient and effective educational system from cradle to career**
For students to be successful in postsecondary education, they must develop both the expectation of pursuing an advanced education and the motivation to do so. They also need to be “college ready” – meaning that they have successfully completed the appropriate preparatory course work for the challenges of post-secondary education. PSU can play a significant role in this process in the following ways: collaboration with partners in the K-12 system and other community groups through its teacher education programs; conducting research that evaluates and establishes best practices; participating in setting appropriate educational goals; and helping assess progress toward those goals.

Objectives

4.1.1 Enhance PSU leadership role in creating Cradle to Career initiatives

4.1.2 Work with faculty and community partners to identify strategic areas for research and community engagement throughout the education continuum

4.1.3 Pursue expansion of PSU’s enrollment and recruitment strategies to strengthen and increase access for students from underrepresented and historically marginalized populations (requires additional resources)

4.1.4 Implement a S.T.E.M. initiative in partnership with local school districts to enhance instruction targeted to college and career readiness (requires additional resources)

4.1.5 Establish a PSU leadership role in creating a seamless, efficient and effective system of educator preparation and professional development

Goal 4.2: Expand and improve Portland State’s online instruction and support to enhance teaching, learning and access

Many PSU students face a number of barriers to higher education because of their multiple commitments to employment, family and community. PSU students continue to demonstrate demand for hybrid and fully online instruction as a way to balance their competing commitments with a desire for a college degree. Meeting this need will allow PSU to be responsive to student and faculty needs, while also limiting the impact on its physical space.

Objectives

4.2.1 Establish policy advisory structure for new Center of Online Learning

4.2.2 Establish and communicate incentive structure for faculty participation in online learning (requires additional resources)

4.2.3 Establish course/program migration plan and communicate to the campus community

4.2.4 Identify location for long-term home for Center of Online Learning
4.2.5 Establish Center policies related to course evaluation, quality assurance, and compliance requirements (ADA, U.S. Department of Education out-of-state approval process, copyright)

4.2.6 Establish and communicate online and hybrid instruction targets and expand offerings in both areas *(requires additional resources)*

**Goal 4.3: Address financial challenges to maintain and expand access**

A disproportionately large number of students at Portland State are financially challenged and rely on financial aid – both in the form of grants and loans – as well as full or part time work to fund their education. As tuition is increased to compensate for reductions in state support, potential students are impacted, as is PSU’s mission of providing access to higher education to residents of the metropolitan region. To fulfill this important access component of the Portland State’s mission as a public institution, the university must address the financial challenges that may prevent participation in higher education.

4.3.1 Develop and implement tuition policies that consider the impact on participation

4.3.2 Consistent with the tuition policy, create tuition remission policies and allocate the resources necessary to promote full participation for students in the metropolitan region *(requires additional resources)*

4.3.3 Expand scholarships with a particular focus on supporting students with financial need *(requires additional resources)*

**PRIORITY/THEME 5: EXPAND RESOURCES AND IMPROVE EFFECTIVENESS:** Expand resources in each of the funding streams (state, private, business partnerships, research, and tuition), manage resources effectively, engage employees, and match investments to strategic priorities.

Despite a growing reputation and the high demand for its services, PSU finds itself at a crucial crossroads. To carry out its missions of education, research and service, it must have sufficient funding to rebuild and grow. However, it cannot depend solely on the state for those funds. State funding now accounts for only approximately 13 percent of PSU’s total annual operating revenue, compared to 48 percent 20 years ago. Students and their families are picking up the greatest share of the cost. Even so, the university finds itself with a growing funding gap that cripples its ability to prepare students for the jobs of the 21st century, recruit and retain excellent faculty and staff, upgrade infrastructure and develop collaborative initiatives to promote economic development and enhance the livability of the Portland Metropolitan region.

PSU will continue to work with the state, as well as the region, to increase public investment in the university. But it also will need to become more efficient and strategic in how it uses existing resources as well as increasing the amount of revenues that come from private donations, research and collaborative partnerships.

**Goal 5.1: Refine and begin to implement a new, strategic budget model for the university**
PSU budget allocation system is much the same today as it was 20 years ago when the university was largely state-funded. This system – which neither recognizes the giant shift in resources from state funds to tuition, nor provides incentives to increase revenues as is required of a more market-driven institution – has proven inadequate. Recognizing this, President Wiewel last year established a Financial Futures Task Force to evaluate the university’s historic budget allocation model and make recommendations for how to provide incentives for productivity and accomplishment and better align future budgets with mission goals and objectives. The committee’s report,29 which was issued in June, recommends establishment of a model that ties funding more closely to enrollment than does the current budgeting system. The report will be refined over the 2011-12 academic year and will be phased in over a one-to-three-year period.

Objectives

5.1.1 Implement the Financial Futures Task Force recommendations, including establishment of a committee to refine the budget model and develop a process for phasing it in

5.1.2 Empower the Deans as effective entrepreneurs within the new financial model

5.1.3 Involve faculty senate and appropriate union representatives in discussions of implications of the new financial model

5.1.4 Evaluate academic unit size and faculty mix in context of student success, organization and administrative effectiveness, institutional research mission and fiscal sustainability

5.1.5 Make academic and research strategies explicit for each college within the new financial model

Goal 5.2: Foster curricular and administrative efficiency and effectiveness

As PSU is challenged to serve more students, help them complete their degrees more rapidly and do both of these in an environment of decreasing state funding per student, the university must pay particular attention to academic and business operations. An effective curriculum promotes student learning and progress toward degree completion and is one where courses are available to students when they need to take them. At the same time, curricular efficiency requires the wise use of both faculty and classroom resources to achieve student success at an acceptable cost.

Objectives

5.2.1 Develop strategies for increasing the number of large lecture classes, where appropriate, and decrease the number of low enrollment courses (per minimum enrollment policy)

5.2.2 Increase departmentally controlled and general pool classroom availability by moving low enrollment classes to non-primetime slots

5.2.3 Expand hybrid and online offerings (requires additional resources)

Goal 5.3: Position the institution to maximize potential benefits of SB 242

The legislation (SB 242), which converts OUS from a state agency to a freestanding public university system, goes into effect on January 1, 2012. By providing the system and its seven member universities more control over purchasing, bonding, personnel, tuition, legal services and other operations, this new law is expected to allow the universities to operate in a more efficient and cost-effective fashion. Implementing the new law, however, will require OUS and the individual universities to move quickly to establish and implement new policies and procedures for broad areas of operations in order to take full advantage of potential efficiencies and cost savings.

Objectives

5.3.1 Working collaboratively with OUS, review, refine and rewrite policies and procedures necessary to implement SB 242

5.3.2 Implement operational efficiencies enabled by SB 242 on earliest possible time frame and develop system to monitor and assess outcomes

5.3.3 Explore potential for institutional board

Goal 5.4: Expand and upgrade campus facilities to meet current and future demands in the most cost-effective and sustainable manner possible

Campus maintenance of physical assets is severely under-funded. This results in quality issues, costly failures, and excessive charge-back to campus projects. A long-term plan with more predictable resources would help us address these issues. Consideration should be given to whether it would be more productive and cost-effective to shift focus from building new projects to upgrading and renovating existing buildings.

Objectives

5.4.1 Establish Capital and Facilities Planning Team

5.4.2 Initiate/complete existing major capital projects including Life Sciences Collaborative Building, College Station Housing, Oregon Sustainability Center, and City Tower

5.4.3 Prioritize and complete deferred maintenance funded by state

5.4.4 Develop 5-year, 10-year strategic capital plans and strategic facilities management and deferred maintenance plans

Goal 5.5: Secure philanthropic support for strategic university priorities, including improved student success, global excellence and enhanced educational opportunity
University Advancement’s strategic plan is aligned with the five themes that guide PSU. Working closely with different divisions and departments, our staff helps develop position and case statements to support global excellence, student access and success. Revenues from private support for scholarships, campus life and programs help attract the best students to PSU; provide access for all, including first generation and underserved students; impact student retention; and improve the quality of the student experience. Working with OIA, RSP, Student Affairs, the Office of Diversity and Inclusion and the academic units, University Advancement will focus on alumni engagement to increase support for these priorities.

Objectives

5.5.1 Engage alumni in recruitment and advocacy and to optimize support

5.5.2 Collaborate with RSP to increase strategic partnerships and secure private grants to support research

5.5.3 Work with the campus community to identify barriers to success that can be mitigated by private gift support

5.5.4 Work with colleges/units to identify collaborative strategies to secure philanthropic support for global excellence

Goal 5.6: Prepare for a major comprehensive campaign and identify campaign priorities

As PSU contemplates embarking on a transformational fundraising campaign, there are many components to be addressed for preparedness. Before the “quiet” phase of the campaign, campus and University Advancement leadership will focus on analyzing the rationale for a campaign, the timeliness of a campaign in view of governance changes and economic developments, and whether there is adequate institutional capacity and engagement to be successful. A critical step is to set campaign priorities to best meet the needs of the institution in the present and in the future. To start with, University Advancement will facilitate a collaborative process that will result in the identification of campus priorities for external private support. Once identified, these priorities will be vetted through conversations and surveys with a multiplicity of constituents and then articulated in a campaign case for support. Ultimately, if conceived and implemented effectively, the campaign will be the baseline for annual philanthropic support long after the goal is reached.

Objectives

5.6.1 Analyze feasibility study results to address deficiencies, decide when to embark on campaign and create a campaign plan

5.6.2 Conduct wealth screening

5.6.3 Work with units across campus to identify campaign priorities
5.6.4 Develop campaign materials and communication plan

5.6.5 Ensure that there are adequate resources and campus-wide engagement for success, such as space and staff (*requires additional resources*)

**Goal 5.7:** Raise visibility of and support for PSU among the general public and policymakers at the local, state and national levels

Support from the general public, potential donors, current and prospective students and their families, alumni, the business community and policymakers at the local, state and federal level is essential if PSU is to be successful in obtaining the resources it needs to carry out its mission on behalf of Oregonians. To achieve that support, PSU must do a better job of educating and engaging stakeholders and policymakers at all levels. University Communications and Marketing will partner with Research and Strategic Partnerships, Advancement, Finance and Administration, Government Relations and the colleges to hone PSU’s messages, increase its visibility, educate and engage stakeholders and build support for its strategic goals and objectives.

**Objectives**

5.7.1 Develop and launch a strategically focused, multimedia communications and marketing campaign to promote PSU at local, state and federal levels (*requires additional resources*)

5.7.2 Build and activate grassroots outreach network for PSU, working collaboratively with University Advancement, the Alumni Association, PSU Foundation, The Oregon Idea, etc.

5.7.3 Develop and implement a plan to increase involvement of administrators, faculty, staff and advocates on strategically important policy and funding issues that affect the region, state and nation

5.7.4 Work with local government officials and business and civic leaders to build support for PSU’s expansion plans, including establishment of an URA around PSU

5.7.5 Develop and implement a plan to increase federal agency contacts and relationships in areas relevant to PSU’s focus areas

5.7.6 Build on current leadership in associations (USU, APLU, AASCU, PNWER, etc.) to develop and implement plan to engage PSU and strengthen our visibility and credibility nationally

**Goal 5.8:** Increase faculty and staff support and engagement to foster organizational success

The case for employee engagement as a catalyst for organizational success is compelling. Studies show that engaged employees are more satisfied in their work and, in turn, contribute more to the organization. They work harder, smarter, more passionately and more creatively. They learn and adapt. They are more connected to stakeholder needs. They go the extra mile and they stick
around. As a result, the organizations for which they work are more successful in meeting their goals and carrying out their missions than their comparator organizations.

**Objectives**

5.8.1 Create an institution-wide committee to assess and develop a plan to enhance employee engagement at PSU

5.8.2 Develop a five-year plan for faculty and staff compensation, professional development, recognition and staffing ratios (*requires additional resources*)

5.8.3 Develop and implement leadership development and management and supervisory training (*requires additional resources*)
2014 Annual Leadership Planning Session Summary Report
Executive Summary

One Voice, One Plan: Working Together to Design PSU’s Future

With a challenging academic year drawing to a close, the 2014 Annual Leadership Planning Session retreat represented a timely opportunity for dozens of University and community stakeholders to come together to share their thoughts and ideas on the future direction of PSU. On May 20th, nearly 85 people, including faculty, staff, students, administrative leaders, and Trustees convened to take a unifying first step in developing PSU’s next strategic plan. The collaborative structure of the day set an important early precedent for how the plan will be developed in the months ahead, beginning this fall and culminating in September 2015.

The Three-Fold Purpose for ALPS 2014

1. Set the stage for re-connecting and unifying University stakeholders.
2. Enter into a facilitated dialogue on how the strategic planning process might be organized.
3. Start the conversation on key opportunities and challenges that will be important for the strategic plan to address.

How the Day was Organized

Coraggio Group, a Portland-based consulting firm with significant higher education experience, was selected to facilitate the work session. The facilitators designed the day to be highly interactive and engaging for all involved. This approach helped to surface a broad range of good thinking from participants on an array of interesting and thought-provoking topics. Eight specific questions were asked and the participants, who were organized in 11 different teams, were given time to discuss their perspectives, then share their table’s insights with the larger group for discussion. Inputs for each question are summarized as part of this report on the pages that follow. Also included as part of this report is a companion document that provides a complete breakdown of all inputs recorded for each of the eight questions posed.

The Eight Questions

1. Imagine PSU in 2020. What are the headlines you’d like to see?
2. What should PSU’s contribution be to the local community, the region, and the world?
3. How can we keep a high-quality PSU education accessible when education costs are rising so steeply?
4. How do we ensure adequate representation in the Strategic Planning Process without making the process too cumbersome?
5. What should PSU’s top three goals be over the next 3-5 years? What are the biggest barriers to those goals?
6. Who are the stakeholders for the Strategic Planning process, and what are three specific ways to make the process transparent?
7. What three strategic questions must the strategic plan address?
8. How do we keep today’s momentum alive when we have the summer break ahead?

There was great deal of alignment and enthusiasm across all 11 teams, based on the responses each group shared. Bold and aspirational thinking certainly led the way for each question the teams dove into.

Key Themes from the Day

- PSU needs to re-think its value proposition to students, and re-define the many ways they benefit as a result of a PSU education.
- The University will continue to play a significant role locally, regionally and statewide, with great headway made on the global stage as well.
- The planning process itself must be highly transparent and open, and should spend significant time in outreach. At the same time, it must be as efficient and straightforward as possible.
- PSU’s strategies must be built on its successes to date, and with a common vision of the future—there is a need to declare what the University wants to be, and then boldly pursue that.
Trade-offs will be difficult, but critical to a successful plan. Being courageous about what PSU needs to stop doing is as important as what the University should start doing.

What’s Next

Certainly there is much work ahead and some heavy lifting to be done. The good news is that ALPS 2014 represented a giant leap forward in terms of gathering input and ideas from key stakeholders on what the process needs to look like and who needs to be involved. As a result of the day, the strategic planning work is off to a strong and exciting start. Certainly, maintaining the momentum built on May 20th will be important. Equally important is the need to design and implement a process that reflects the guidance gleaned during the day. A few of the immediate next steps that participants agreed to include:

- This summer, a draft process will be created for how the strategic planning work will unfold, including methods for stakeholder input and ratification.
- Strategic planning will begin this fall and will likely span through much of the coming academic year, targeting completion in September 2015.
- The planning process will be inclusive, transparent and accessible to the University’s diverse stakeholder community.
- The planning work will be widely and regularly communicated through a range of media channels.

What follows is a summary of themes and specific insights recorded against each of the eight questions posed by the facilitators. Any questions about the day can be directed to Lois Davis at 503-725-2685 or by email at loisdavis@pdx.edu.

Thank you for choosing Coraggio as your facilitators.

- The Coraggio Team
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Key Strategic Questions
These were more substantial questions that Coraggio had the tables really spend some time on. Twenty minutes were provided for table discussion, the tables reported out their thoughts to the whole group for approximately 20 minutes, and then we spent some time discussing the issues as an entire group. Importantly, we asked the participants to think in bold ways and answer some of these questions from a “can-it” point of view.

Strategic Hustles
Coraggio used what we call “Strategic Hustles” to get tables to work through a question more quickly, and gather a larger volume of short answers. For the Strategic Hustles, we gave the tables 10 minutes to formulate their answers, we spent 15 minutes going through report-outs, and then had a summary discussion for approximately five minutes. To ensure that we gathered multiple perspectives throughout the day, we asked each table to assume a “point of view” from which to answer the Hustle questions.
Imagine PSU in 2020. What are the headlines you’d like to see?

Why is this question important?
There’s a saying, “if you don’t know where you’re going, any road will take you there.” Imagine creating a strategic plan for PSU without a clear understanding of where the institution would be heading over the coming years. Having an agreed upon vision for PSU will give clear direction to the strategic planning work that will kick off this fall. Though we did not have time to develop a final vision statement during the ALPS retreat, this question helped to set the stage for the level of thinking that took place during the day. It also revealed some very bold possibilities!

With nearly 90 stakeholders in participation divided into 11 teams, there was an impressive level of alignment in terms of how stakeholders imagined PSU’s future.

The assignment was to choose a publication and then write the headline (or headlines) each table team imagined reading about six years hence.

After some lively table interaction, what surfaced were 11 bold, aspirational ideas that envisioned a financially stable institution making a meaningful difference—certainly in the lives of its students—but also as an influencer at the regional, state, national and global levels.

Below are a few excerpts from the report-outs:

**The Economist**
“Oregon achieves 40-40-20 with PSU leading the way”

**The New York Times**
“PSU: The Gold Standard for Urban Universities”

**Fast Company**
“PSU, the Change-Maker: Teaching Students to Beat the Odds”

**USA Today**
“PSU recognized as Leader in Internationalization Start-Up Companies”

**The Wall Street Journal**
“Buffet and Gates Endow PSU $1b”

**US News & World Report**
“PSU Emerges as Nation’s Top Ranked Urban University”
Key Strategic Question #1

What should PSU’s contribution be to the local community, the region, and the world?

Why is this question important?

At its core, PSU is a mission-driven organization. And while that mission certainly involves education and research—those student-centered areas that are the raison d’être for a university—we also must recognize that the influence of a university doesn’t end at its walls, or with its students. There is a broader impact to be considered, and having alignment on that intended impact will be important as we design our strategies to move PSU into the future.

The ALPS participants identified a broad range of contributions to the world outside of the institution, and had interesting conversations questioning what PSU’s “region” really is. Coming to a better definition of the region influenced by PSU may be part of the Strategic Planning process, as it has implications for which institutions PSU will collaborate with, and what PSU’s core catchment area is.

Without question, delivering a high-quality education was agreed to be the most important contribution, as was the principle of PSU being more accessible than other institutions. In general, participants also seemed to align on the idea that PSU has an impact on the local, regional, and state economies not only through its contribution to the workforce, but also through its contributions to innovation and entrepreneurship. In the regional and international arenas, the participants noted PSU’s leadership role in shaping urban design and sustainability principles.

General
- Entire span of education: pre-K through graduate school
- Innovation
- Collaboration with local community and educational institutions (community colleges, international universities), as well as between urban/rural
- Leadership (active, sustainability, cultural)
- Interconnectedness between PSU and community/world

Local
- Positive impact (cultural and economic) to Portland’s community as well as help address local issues
- Access to arts and culture/connecting the arts and education communities
- Access to high quality, affordable and accessible higher education
- Innovative, educated and enriched citizens

Regional
- Impact public policy
- Help create the link between students and employers
- Excellent and beneficial research

International
- Global leaders and citizens
- Leaders in sustainability
- Skills and knowledge to international students
Key Strategic Question #2

How can we keep a high-quality PSU education accessible when education costs are rising so steeply?

Why is this question important?
The national conversation around student debt and the rising cost of tuition is hard to miss—this is a major concern across the United States today. Regionally, PSU is still a relatively accessible urban school. But these national trends are not likely to change, so an ongoing strategic challenge for PSU will be to secure the resources necessary to provide that high-quality education to as many students as possible.

ALPS participants were asked to formulate their responses to this question in a “can if” format. One broad trend that was particularly intriguing and innovative was to shift more towards a competency-based model and away from the model of credits and requirements. A majority of participants also suggested that funding models would need to change in some significant ways as the institution goes forward—the changes to the landscape have been too significant to rely on older models of funding.

Some key themes heard from the participants include:

We can, if we rethink our service delivery model.
- Credits – rethink as measure of learning
- Pedagogy – structure of sequence and delivery, innovative methods/models, efficient degree programs, fewer and higher quality programs, competency-based
- Educational outcomes – make decisions with students in mind
- Tuition – link to cost, refund for graduation
- Reduce rules and regulations, allowing more focus on education

We can, if we change our funding.
- Stabilize sources
- Find alternative and new sources (tax revenues, sell assets)
- Build endowments
- Develop new funding model that relies less on tuition increases

We can, if we focus on recruitment and retention - improve SEM, change operational culture.

We can, if we focus on rewards for opportunities, innovations and risks.
Key Strategic Question #3

How do we ensure adequate representation in the Strategic Planning process without making the process too cumbersome?

Why is this question important?
As we start to design the PSU Strategic Planning Process, we need to balance an inclusive process with one that gets to a result. Both process and results are critical, but one can’t be at the expense of the other. The input from this question will help us find the right balance of both, ensure we get the best of everyone’s thinking, and ensure the result is both impactful and actionable.

As with the previous Strategic Questions, the table teams had a good discussion about what balance works in the PSU environment. A few major themes emerged from the discussion, as well as some tactical suggestions on how to run the process.

Major Themes
First, the process for developing the PSU Strategic Plan needs to be an accessible and iterative process. Diverse groups will want input into the plan, and those ideas will need to be shared broadly and openly. As the process gets started, good ideas will surface, and then will be built upon and discussed along the way. It will be important that the process encourage a lively, active debate.

Second, the group agreed that it was important not to get mired in process. Anyone who has ever been involved in Strategic Planning knows that sometimes it can feel like it drags on for a long time. At some point, the debate needs to come to a decision. As a result of the process, that decision will be based on insight and discussion which has considered many different, sometimes divergent, points of view. As one group put it, “Build trust through engagement, but ultimately get to a plan and show traction on progress.”

Tactical Ideas
Some specific ideas that were discussed for successful process design included:

- Analyze prior strategic plans to identify themes
- Establish rules of engagement and principles for the selection of final initiatives
- Conduct a survey with carefully worded questions for input
- Offer a variety of group meetings, using both existing forums such as Faculty Senate and new forums, with “unlikely pairs” leading the discussion (planning process leaders who may have different points of view)
- Model the process like ReThink, as an iterative process
- Build a dedicated webpage, with a record of decisions and process, where everyone can visit and contribute
- Create a steering committee with a variety of stakeholders that will make the ultimate decisions
What should PSU’s top three goals be over the next 3-5 years? What are the biggest barriers to those goals?

Why is this question important?

“What you get by achieving your goals is not as important as what you become by achieving your goals.” Henry David Thoreau.

At the very core of Strategic Plan development is achieving clarity and alignment on goals. This question explores the potential goals that will guide PSU’s Strategic Plan – specific, measurable areas that will positively impact the University, its students, and its stakeholders. The answers to this question provide initial themes that will be explored through the PSU Strategic Planning Process. However, goals always involve significant barriers to overcome, otherwise they aren’t as aspirational as they should be. So this question has two parts – first the goals, then the barriers.

The 11 groups were asked to answer this question from a specific Point of View – as a way to show the many perspectives on PSU’s future, but also to show how important the work of alignment on goals will be. The Points of View were:

- Current PSU Students
- Future PSU Students
- Citizens of Portland
- Citizens of the World
- Donors & Alumni
- PSU non-Faculty Staff
- PSU Board of Trustees
- PSU Faculty
- PSU Administration

There was considerable alignment on the goals, even when the question was viewed from different points of view. While more than 35 goals were discussed, a few of the main goal themes are highlighted here:

- Create a shared and focused Vision (Administration, Faculty, Board of Trustees)
- Ensure the economic viability of PSU (Administration, Board of Trustees)
- Decrease the cost of education (Current Students, Future Students)
- Prepare students for a career (Current Students, Future Students, Donors and Alumni, Citizens of Portland)
- Develop PSU as a center of Innovation (Citizens of the World, Citizens of Portland, Faculty)

Once the 11 groups had identified their goals, we asked that they identify the barriers to those goals. The barriers were even more consistent than the goals – lack of resources, lack of a cohesive PSU identity, “turf wars” and organizational rigidity, and responsiveness to student needs.
Strategic Hustle #2

Who are the stakeholders for the Strategic Planning process, and what are three specific ways to make the process transparent?

Why is this question important?
Over the summer, a proposed planning process will be designed for stakeholder consideration and ratification. The insight gleaned from this question will be essential in informing the overall planning approach, identifying the key stakeholder groups to be involved, and identifying specific ways to ensure transparency from start to finish.

Based on the group discussions, two guiding principles emerged:

First, the best and most thoughtful strategic plan for PSU will not be developed by a select few who retreat to a clandestine star chamber to secretly plan the University’s future. The right plan for PSU will be the result of diverse points of view emanating from PSU’s broad and diverse constituency, including students, staff, faculty, administrative leadership, civic and business leadership, education partners and parents—just to name a few.

Second, the process will need to be designed with transparency at its core. While there will be many stakeholders actively involved in the planning process, there will be many more who will not be able to participate in a hands-on way. Yet, these stakeholders are just as important and they will most certainly have an interest in how the plan is evolving. They may even have an interest in weighing in on certain aspects of the plan. We want to make sure that anyone who has an interest in doing so has a way to communicate his or her thinking.

It’s important to acknowledge that this past year has been challenging. In many ways, this plan and, more specifically, the process to complete the plan, represents a potential new day for strengthening trust, forging new relationships and putting the past in the past. It’s an opportunity to take a big, collective leap forward.

In short, participants in the ALPS retreat believe that PSU’s five-year strategic plan should be developed collaboratively.

A few stakeholder groups identified through the table discussions included:

- Administration
- Faculty
- Staff
- Students
- Local Community
- Employers
- Parents
- Alumni
- Donors

There were also some specific methodologies suggested:

- Focus Groups
- Faculty Inquiries
- Website Repository
- Surveys
- Crowdsourcing
Strategic Hustle #3

What three strategic questions must the Strategic Plan address?

Two of the greatest benefits a strategic plan provides an organization is clarity and focus. Clarity on who we are, where we’re going, why going there is important and how we’re going to get there. And a sharp focus on the specific actions that will be taken to move the University closer to realizing its stated vision and achieving the goals set forth in the strategic plan once it’s complete. Without this kind of clarity and focus, we risk falling behind and losing ground.

As the 11 groups reported out on their discussions, it became clear that there is strong alignment on several fundamental questions. These include:

1. What kind of university do we want to be?
2. How do we establish a value proposition for all of our students?
3. What will be our path to economic viability?
4. How will we measure our progress?
5. What are we going to stop doing?
6. How can we build on our current successes?

These are only six of the approximately 75 recorded questions from the day. The right planning process, combined with the commitment to include a diverse range of stakeholder input will help to sort through and prioritize the University’s most important opportunities and challenges. The plan may not address all questions, but it most certainly will address the ones deemed most important.
Strategic Hustle #4

How do we keep today’s momentum alive when we have the summer break ahead?

Why is this question important?

The ALPS retreat is a rare chance to gather pre-planning input from a broad group of stakeholders for inclusion in the Strategic Planning process. As expected, the group produced a tremendous amount of input and thinking that will help to ensure the right overall planning approach. Perhaps more importantly, the group began to think strategically and collaboratively. This alignment is a precious commodity, and ensuring that it doesn’t go fallow over the summer months will give the formal process a much better start in the fall.

The ALPS attendees generally agreed that it is unnecessary and undesirable to expect the group to do much Strategic Plan work over the summer, but that an informational process would keep stakeholders engaged and prepared to start the process in earnest this fall. The group generally saw four main opportunities for the planning process to maintain momentum over the summer:

- The first and most urgent is for Coraggio Group to prepare this report from the ALPS retreat. This will allow attendees to refresh their memories of the day’s discussions, and will also be a tool that they can use as ambassadors when they speak to their respective peers about the beginnings of the process.
- The group also saw summer as an opportunity for the planning team to develop a timeline and identify milestones detailing the major portions of the 6-12 month planning process.
- Participants stressed the importance of conducting a serious review of the existing plan as an initial step for the new plan, so as not to “throw the baby out with the bathwater.” Many of the key elements of that plan will still apply, and should form the basis for the new plan.
- Finally, the group recommended using the summer months to communicate with stakeholders about all of the items listed above. This will bring newer participants “up to speed” and will allow current participants to stay abreast of the planning process.
Portland State University was honored to invite the following to the 2014 Annual Leadership Planning Session:

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Portland State University

Strategic Planning Charge from the Board of Trustees
RESOLUTION DIRECTING THE PRESIDENT REGARDING STRATEGIC PLANNING

Approved by the Board
September 11, 2014

BACKGROUND

A. Portland State University last completed a comprehensive strategic planning process in 2011, culminating in a 2011-2014 Strategic Plan.

B. A new strategic plan to lead Portland State University for the next five to ten years is now necessary and appropriate.

RESOLUTION

Now, therefore, be it Resolved by the Board of Trustees, that:

1. The Board directs the President to initiate a campus-wide discussion about PSU’s strategic directions, resulting in a new strategic plan. The plan should be completed by the end of the 2014-1015 academic year, or early fall 2015 at the latest, and should be a high-level strategic plan rather than a detailed work plan.

2. The plan should build on PSU’s historical role and strength and its current vision and mission. The plan should also reflect and contribute to achievement of statewide goals and priorities. The plan should be based on reasonable assumptions regarding resources and assume that internal funding decisions will continue to be made in the context of the Performance Based Budgeting model.

3. The Board wishes to be involved in the planning process through representation on the strategic planning committee and through regular updates and consultation with the full Board.

4. The plan should be developed with involvement from internal and external constituencies such as the Faculty Senate, student senate, represented and unrepresented employee groups, the PSU Foundation and alumni association, and key external stakeholders. The Board retains authority and responsibility to approve the plan.

5. PSU’s formally approved vision is “to become a leading public urban university known for excellence in student learning, innovative research, and community engagement that contributes to the economic vitality, environment sustainability, and quality of life in the Portland region and beyond.” The strategic plan should provide direction for the pursuit of this vision during the next five to ten years, with a particular focus on the following:

   a. How will PSU know we have become a "leading public urban university'? To which institutions should we compare ourselves? How do we define and measure "leading'? What is the time frame in which we seek to achieve the goal?
b. What specifically do we mean by "excellence in student learning, innovative research, and community engagement"? Are these equally important? What are the key metrics? How much of our effort and resources do we focus on these three characteristics compared to everything else? In particular, what trade-offs, if any, are needed between the focus on 'excellence' and that of providing broad access and opportunity?

c. How do the changes in higher education (reduced public funding, rising tuition and concern about student debt, skepticism about the value of higher education, demographic changes, rise of online learning, changes in the composition of faculty and staff, increased pressures around salaries and benefits, diversification of providers, responsibility for 40-40-20 and the completion agenda, etc.) influence how we pursue our goals?

6. Given the answers to the questions posed in 5 (a), (b) and (c) above, what key changes and initiatives does PSU want to undertake in regard to our educational offerings, methods of delivery, programs, business and employment practices, staffing, support structures, funding sources and processes, etc. in order to succeed?

7. While the plan needs to have a five to ten year strategic perspective, what are the key issues PSU needs to address in the next 2-5 years (2016-2020), and how can we do so.

APPROVED BY THE BOARD OF TRUSTEES
SEPTEMBER 11, 2014

Secretary to the Board
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Objectives/Goals

Three-Year Objectives 2015-2019
Vision
What is the ideal future state we will strive to create? What are we committed to making happen?

Mission
What is most important to us as we strive to realize our Vision? What is the focus of our work?

Values
What are the fundamental beliefs that shape how we work together to serve our Mission?

Reputation
What is the experience we want PSU to be known for?

Unique Role of Value
What unique and sustainable value does PSU deliver to students, to faculty, to Portland, and to Oregon?

Strategic Imperatives
In broad categories, what must be accomplished during the planning horizon?

Strategic Area of Focus
What are the core areas of focus for PSU over the next five years?

Objectives/Goals
How will we measure success?