

# Scope of Work: Strategic Planning – The Ascent

## BACKGROUND & PURPOSE:

Eastern Oregon University (EOU) is beginning its 88<sup>th</sup> year serving as an institution of higher learning. The institution has a proud history of providing access and opportunity to students from across the state of Oregon and in particular the eastern Oregon region. Recently, the institution has experienced significant leadership instability during a time of economic stagnation and a changing competitive landscape in higher education. This has resulted in financial challenges and created obstacles to institutional excellence.

EOU has tremendous opportunity to thrive in serving students, the state and the region with the development and execution of an effective strategic plan. Now is the time for EOU to build upon its strengths and pursue the many opportunities that exist in order to enhance current performance and build a tradition of excellence. Under a new governance structure for higher education in the state of Oregon, we have a passionate and participative Board of Trustees. We have committed leadership, dedicated faculty and staff, and supportive alumni and friends of the university. We must proceed forward with purpose.

EOU's mission, which describes what we are and what we strive to do now, is a point of departure for our strategic planning:

*EOU guides student inquiry through integrated high-quality liberal arts and professional programs that lead to responsible and reflective action in a diverse and interconnected world.*

*As an educational, cultural and scholarly center, EOU connects the rural regions of Oregon to a wider world. Our beautiful setting and small size enhance the personal attention our students receive, while partnerships with colleges, universities, agencies and communities add to the educational possibilities of our region and state.*

## OBJECTIVES:

The University Council will work with the University President to lead an inclusive process that will provide all campus and regional center stakeholders with opportunities to contribute to the development of the institutional strategic plan (goals, measurable objectives, and key performance indicators (KPIs)). This work is to be completed by January 2017. Given the amount of information to be synthesized an ad hoc committee, appointed by the President, will support University Council.

The Strategic Priorities Organizing Committee (SPOC) is an ad hoc group responsible to University Council and the President serving as the central coordinating group for Eastern Oregon University's strategic planning process. SPOC will assist, support, and review progress by the University Council and other participating University committees to develop institutional goals, measurable objectives, and key performance indicators (KPIs). The committee will review and synthesize material generated from the various governance bodies. It will prepare documents for further review by the University Council and the Board of Trustees and develop the communications plan for reporting progress to stakeholders.

## WORK DEFINITION:

The sponsor of this work is Tom Insko, University President. The University Council will act as the team. The Strategic Priorities Organizing Committee (SPOC) will serve as an ad hoc group.



## GIVENS:

1. Major actions and decisions moving forward will build on our ability to combine the best elements of a liberal arts college with select graduate and professional programs.
2. Planning work and recommendations will take into full consideration, and be coordinated with, the accreditation process.
3. There will be no more than 7 goals associated with the strategic plan.
4. The strategic plan will support multi-modality growth (on campus, online, and onsite).

## KEY ASSUMPTIONS:

1. A fully transparent and inclusive process will be utilized to gather input for plan development.
2. EOU's mission will serve as the basis for plan development.
3. Timeline is focused on institutional aspirations for accomplishment at EOU's 100<sup>th</sup> anniversary with consideration for five- and ten-year objectives and performance indicator targets.
4. An updated SWOT analysis will inform the plan.
5. Higher Education Coordinating Commission (HECC) strategic elements will inform the plan.
  - a. Goal setting
  - b. Financial stability and sustainability
  - c. Student pathways
  - d. Student support, outcomes and success
  - e. Access and affordability
  - f. Community and economic impact (regional relevance)
6. Six elements of emotional support and experiential learning in college that are correlated with long-term career and life success will inform the plan.
  - a. A professor who made them excited about learning
  - b. Faculty and staff who care about them as a person
  - c. A mentor who encourages them to pursue their goals and dreams
  - d. Completion of a meaningful long-term project
  - e. A job or internship where learning is applied
  - f. Involvement in extracurricular activities

## MILESTONES:

1. Launch planning discussion with Board of Trustees by August 10, 2016.
2. Identify and enroll members for SPOC by September 16, 2016.
3. Complete update of SWOT analysis by October 25, 2016.
4. SWOT review and status update report to Board of Trustees on November 10, 2016.
5. Review of draft goals, objectives and KPIs with Board of Trustees on January 19, 2017.
6. Final strategic plan recommendations presented for approval to Board of Trustees on April 20, 2017.

## DELIVERABLES:

1. Strategic plan document
2. Strategic plan executive summary
  - Summary of goals, objectives and key performance indicators
3. Matrix of alignment between Strategic Plan and Core Themes

## SPECIFICALLY EXCLUDED SCOPE:

1. Modification of EOU's mission statement.
2. Creation of institutional values and principles.

## MEMBERS:

### University Council

- MJ Heather, Chair
- Jeff Carman, Vice Chair
- Wilson Zehr, Recorder
- Dan Mielke
- Nancy Knowles
- Ronda Fritz
- Emily Sharratt
- Jacque Naegle
- Kaycie Lane
- Lori Baird
- Student Representatives (3)

### SPOC

- University Council Chair, MJ Heather
- Faculty Senate Representative, Scott McConnell
- Budget & Planning Committee Chair, Stephanie Upshaw
- Director of Institutional Research, Holly Chason
- Accreditation Liaison Officer, Karen Clay
- Director of Academic Assessment & Faculty Development, Donald Wolff