A year ago, the Board’s Academic Strategies Committee (ASC) was created and charged with primary responsibility for developing action steps needed to implement the Board’s 2025 Long-Range Plan. At the foundation of that charge is the achievement of the Board’s four goals:

1. Create in Oregon an educated citizenry to support responsible roles in a democratic society and provide a globally competitive workforce to drive the State’s economy, while ensuring access for all qualified Oregonians to quality postsecondary education;
2. Ensure high-quality student learning leading to subsequent student success;
3. Create original knowledge and advance innovation; and
4. Contribute positively to the economic, civic, and cultural life of communities in all regions of Oregon.

In July 2009, the ASC identified 11 priority topics within three broad strategic areas needing particular focus during 2009-10. These broad areas and priority topics, flowing from Board goals, guiding principles, and strategic priorities, include:

1. Mission and portfolio
   - Institution missions
   - Central Oregon higher education
2. Economic development, job creation, and workforce enhancement
   - Globally competitive research
   - Graduate education
   - Sustainability
   - Portland higher education connections to economic development
3. Access and student success
   - Latino student success
   - Rural student success
   - Portland area student success
   - Student retention and completion
   - Teacher education
The Committee turned to existing councils, staff, and other expert sources as “resource teams” to assist in the analysis of these priority topics. In November 2009, the resource teams were given a template for reporting back to ASC on a range of potential action steps that could serve to advance that area. The template provided five categories in which to analyze and test potential actions:

- **Current situation** – What is the current state driving the new initiative or action step?
- **Possible with existing resources** – Is this action step possible to undertake without additional resources?
- **Can be accomplished with reallocation** – Is this action step possible to undertake with a reallocation of existing resources?
- **Requires new funding** – Would this action step require new funding to carry out?
- **Supporting information** – What information or data are needed to develop this action step or initiative?

Between January and April 2010, the resource teams presented the results of their analysis and provided the ASC proposed action steps, some of which were endorsed immediately by the Committee since they did not require new funding and others that were advanced for further consideration as part of a set of budget items to be recommended to the full Board. At its April meeting, the ASC considered the list of action items presented as the top two or three priorities from each resource team, reduced the list, and assigned staff to integrate the proposed actions into a more focused set of 2011-2013 budget packages and include the non-funding related items in the overall recommendation of the Committee.

The development of the final proposals and action items has been guided by two important principles: (1) building on existing strengths within OUS and (2) leveraging greater power and capacity through partnerships and collaboration. The application of these principles is evident in the substance of the proposals and in the processes through which they were developed. While the initial work was carried out by separate councils, committees, and resource teams, the final array of recommended proposals is a true integration of work reflecting the shared perspectives of many participants focused on advancing the four goals of the Oregon University System.

The ASC recommendations are now arrayed along six strategies and priorities for 2011-2013:

- Aligning institution missions to frame the OUS portfolio
- Creating a college-going culture for underrepresented students
- Improving student outcomes
- Preparing for a diverse world
- Serving Oregon with regionalized approaches
- Strengthening critical areas of Oregon’s economy
The strategies and priorities for which operating budget funding is being sought are detailed in Appendix A. In addition, the ASC has endorsed the proposal from Oregon Institute of Technology for a new building in Wilsonville to consolidate the location of OIT’s programs in the Portland area, with a recommendation that the project be advanced through the capital budget process.

**Aligning Institution Missions to Frame the OUS Portfolio**

The important work of structuring the OUS portfolio operating principle adopted by the Board as part of its Long-Range Plan has been led by the Provosts’ Council in coordination with the Chancellor’s Office and institution presidents. The focus of that work has been on aligning institutional missions along three core categories: undergraduate geographic access, academic program mission intensity, and research and innovation. Initial designations of level of mission engagement for each institution in each category have been drafted, and data are now being compiled to compare the proposed mission focus with the current state. In the course of that analysis, gaps will be identified and highlighted for full Board discussion in July. Provosts will also advance the initial work of identifying metrics as part of the mission alignment framework. That work, too, will be included in the Board’s July discussion.

A recent addition to the OUS portfolio and mission alignment focus is the development of a School of Public Health, currently under discussion among presidents of Oregon State University, Portland State University, and Oregon Health and Science University, and the chancellor. Still at the initial stages of discussion, the emerging proposal should provide solutions to critical research and workforce preparation needs in public health, particularly as Oregon faces growing challenges in aging, obesity, chronic diseases, health disparities, and many other broad health concerns.

At this early stage of development, it will be helpful for ASC to frame the discussion and set policy parameters, assign the presidents of the institutions involved to develop a proposal, and then forward the proposal to the Provosts’ Council for its recommendation through the regular academic program review process.

No budget requests are proposed for either the mission alignment work or the School of Public Health at this time.

**Creating a College-Going Culture for Underrepresented Students**

This priority area contains a set of integrated proposals that address Latino, rural, first-generation, and other underrepresented student needs for outreach and preparation for college. Policy package (budget) proposals include:

- Mini-grants for outreach and retention, to develop and test new approaches;
- Bilingual college access information for Spanish-speaking students and families; and
• Increased support for ASPIRE and GEAR UP, along with summer institutes for counselors and mentors, focused specifically on rural, underserved communities.

New funding requested for 2011-2013 for these proposals totals $2,475,060. Of that total, $336,700 is in one-time biennial costs.

In addition to the specific budget proposals, there are a number of opportunities in this area for Board and institution advocacy. The Latino Student Success Resource Team (LSSRT), convened to help develop 2011-2013 proposals as part of the ASC’s work plan, has proven to be a rich source of information, analysis, best practices, and communication not only for the ASC but also for OUS institutions. The ASC has previously noted the value of continuing the work of this group and such a recommendation is included in “Preparing for a Diverse World.”

Other potential targets for Board advocacy to assist Latino students include partnership with the Hispanic Scholarship Fund (HSF) and support for the federal Development, Relief and Education for Alien Minors (DREAM) Act. In addition, the LSSRT recommended that campuses explore alternative methodologies for determining student financial “need,” apart from the standard federal financial aid FAFSA-driven process, which would provide greater opportunity for students to earn campus-based scholarships. All of these efforts have been recommended as non-funding related action steps by the LSSRT.

Both the Board’s new ONWARD network – carrying forward the work of the former Student Participation and Completion Committee – and the Portland Regional Higher Education Access Advisory Council, proposed under “Serving Oregon with Regionalized Approaches,” can provide strong advocacy for student outreach and success.

Improving Student Outcomes

Student retention has been a high priority of the Board and OUS for the past several years. As both the growth in funding for the Oregon Opportunity Grant and the economic downturn have further increased student demand and OUS enrollment, institutions are hard pressed to provide the services necessary for students to succeed to degree completion, especially first-generation and other high risk students.

The actions proposed in these recommendations, developed principally by the Inter-institutional Council of Enrollment Managers (ICEM) but also reinforced by the work of the LSSRT and the Portland Access resource team, will incentivize institutions to develop effective and innovative approaches that target the retention of high risk students. New, as yet untested efforts would be supported through mini-grants (this is the same source of funding as the mini-grant proposal listed under “Create a College-Going Culture”). Already-proven strategies, such as retention programs tied to need-based aid and peer mentoring and advising, would be expanded. Finally, the full circle of PK-20 alignment is incomplete because data on teachers are not currently available to assist teacher preparation programs in evaluating their effectiveness.
in preparing teachers for the learning environments into which they will enter; proposed one-time funding will support a work plan to implement a teacher data exchange mechanism.

New funding requested in 2011-2013 for “Improving Student Outcomes” totals $7,000,000. Of that total, $50,000 constitutes a one-time biennial cost. The amount needed to support the retention-related mini-grants has been included in the proposal for “Creating a College-Going Culture.”

In addition to the outcomes achieved through the budget proposals, recommendations for continued and expanded performance funding for retention would create institutional incentives for improving retention of high risk students as well as overall retention. The connection between performance funding and the mini-grant funded projects, peer mentoring approaches, retention/need-based aid programs, and other efforts will need to be further explored with the Board’s Finance & Administration and Governance & Policy Committees.

Other non-budget related recommendations include developing partnerships with ONWARD and other student success focused groups to accelerate the work that campuses are able to do to retain high risk students, and including a program evaluation component in all of the student outcomes efforts recommended for adoption.

Preparing for a Diverse World

As more students of color, particularly Latino students, enroll in OUS institutions, it is increasingly critical that the faculty and staff in our universities reflect the diversity of the students and the larger world. In a highly competitive market, OUS institutions have struggled for decades to attract and retain a diverse faculty.

One of the budget proposals for this area addresses this challenge by providing increased funding for expanding diverse applicant pools and for recruitment and retention of faculty of color. In addition, because faculty with a deep and nuanced understanding of diversity issues developed through scholarship and research are not limited to faculty of color, the proposed funding would also target the recruitment and retention of faculty that advance scholarly work related to diversity, equity issues, social justice, and multi-culturalism, regardless of their race or ethnicity.

A second budget proposal would provide funding for an ongoing Latino Student Success Advisory Council. During the past year, members of the LSSRT have gained great value from the regular opportunity to share promising practices and to develop solutions and resources for students. A formal Council, with funding for materials and resources as well as meetings and symposia, would serve as an effective vehicle to address ongoing Latino student needs.

New funding requested for “Preparing for a Diverse World” totals $430,000, all in recurring costs.
For students at any level of education, having faculty and K-12 teachers who are sensitive to and respectful of the variety of social and cultural experiences students bring to their learning is essential and will be even more critical as the world grows more diverse. Non-budget related recommendations of both the LSSRT and the Teacher Education resource group focus on enhancing faculty and teacher cultural competence development through inclusion of cultural competence in teacher preparation programs and consideration by the new Latino Student Success Advisory Council of appropriate approaches for university faculty.

**Serving Oregon with Regionalized Approaches**

The 2025 Long-Range Plan identified a particular focus for Portland and Central Oregon, where rates of growth have outpaced the existing capacity to serve higher educational needs. In addition, the more remote areas of Oregon contain underserved populations that have lower educational attainment levels and are challenged by geography and distance from population centers. All of these regions have specialized needs for OUS programs, facilities, and services.

The budget recommendations integrate common needs reflected in the work of the Rural Initiatives Committee (formed to address similar concerns in 2009’s Senate Bill 442) and the Central Oregon Higher Education Assessment Team (HEAT). The “hub and spoke” model and Central Oregon “University College” recommendations also focus on efforts to address curricular and program development, including “gateway” courses. Both the rural and Central Oregon approaches include greater PK-20 alignment, not explicitly addressed in the budget proposals but anticipated as important elements and outcomes.

New funding (excluding capital construction) requested in 2011-2013 for “Serving Oregon with Regionalized Approaches” totals $1,710,000. Of that total, $510,000 is in one-time biennial costs.

While several of the proposals included in “Strengthening Critical Areas of Oregon’s Economy” address specific needs of the Portland metropolitan area, a regional focus for Portland has also been student access and success. An important source of direction to advance better PK-20 alignment and student support in Portland is the proposed Portland Regional Higher Education Access Advisory Council. In cooperation with the ONWARD network, the Advisory Council will provide coordination and access to information about available scholarships and grants, and will serve as a resource for best practices in mentoring and preparing first-generation students and students of color in the Portland area (also noted under “Create a College-Going Culture for Underrepresented Students”). No budget request is proposed at this time for the establishment of the Advisory Council.

**Strengthening Critical Areas of Oregon’s Economy**

The “Strengthening Critical Areas of Oregon’s Economy” strategic priority integrates proposals from the Research Council, the Provosts’ Council, the Board’s Sustainability Initiatives Committee, the task group addressing Portland Higher Education Connections to Economic
Development, the Northwest Collaboratory for Sustainable Manufacturing (NWCSM), and the Engineering and Technology Industry Council (ETIC). A primary theme throughout the proposals is Sustainability, addressed by proposals for a sustainability research initiative, functional support for sustainability efforts within the Chancellor’s Office, enhanced doctoral student support in sustainability-related disciplines, and the Sustainable Engineering proposals of ETIC. Additional proposals (core facilities for proteomics and high performance computing, the metals and manufacturing “collaboratory,” and the product design collaborative) reflect inter-disciplinary, inter-institutional, and public/private partnership approaches to addressing research-based economic development for Oregon.

The new proposals build on other critical components of OUS’ capacity and excellence to advance Oregon’s economic vitality through research and innovation, including the Life Sciences Collaborative Complex and the Oregon Sustainability Center in Portland.

New funding requested in 2011-2013 for “Strengthening Critical Areas of Oregon’s Economy” totals $30,540,000. Of that total, $5,755,000 is in one-time costs.

In addition to the budget requests described above, the Provosts’ Council recommended that OUS create a policy structure and process for developing and implementing the Professional Science Master’s (PSM) degree. This proposal does not include a budget request and is now under way within the Provosts’ Council. PSM programs combine coursework in science disciplines with courses in business management and will enhance the quality of the professional workforce needed by Oregon’s businesses.

Next Steps for Academic Strategies Committee

Appendix A provides a detailed description of the proposed Policy Option Packages that will advance the goals of the Board’s Long-Range Plan. These policy packages are listed in the table on the following pages, along with their costs. The Academic Strategies Committee is asked to consider or confirm its intentions with respect to advancing the items to the full Board with a funding recommendation. Now placed into a more integrated context, do they constitute the packages that best reflect the Committee’s charge? Are there alternative ways to accomplish the objectives of any of the action items?

Following the May 13th ASC discussion, staff will note any changes in the “Recommended Disposition” column and will provide the updated table to the full Board for its discussion on May 14th.
### Summary of ASC Proposed Policy Packages and Costs for 2011-2013

<table>
<thead>
<tr>
<th>PROPOSED ACTION</th>
<th>TOTAL REQUESTED</th>
<th>ONE-TIME ONLY PORTION</th>
<th>RECOMMENDED DISPOSITION</th>
</tr>
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<tbody>
<tr>
<td><strong>1. Creating a College-Going Culture for Underrepresented Students</strong></td>
<td>$2,475,060</td>
<td>$336,700</td>
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</tr>
<tr>
<td>A. Mini-grants for Outreach and Retention</td>
<td>250,000</td>
<td>250,000 (assumes one-time 2013-15 allocation to cover 3-yr grant cycle)</td>
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<tr>
<td>B. Bilingual College Access Information</td>
<td>41,700</td>
<td>11,700</td>
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<tr>
<td>C. Increased Support for ASPIRE &amp; GEAR UP; Summer Institutes for Rural Counselors and Mentors</td>
<td>2,183,360</td>
<td>75,000</td>
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<td><strong>2. Improving Student Outcomes</strong></td>
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<tr>
<td>A. Retention Programs Tied to Need-Based Aid</td>
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<tr>
<td>B. Increased Peer Mentoring and Advising *</td>
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<tr>
<td>C. Teacher Data Exchange</td>
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<tr>
<td><strong>3. Preparing for a Diverse World</strong></td>
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<td></td>
</tr>
<tr>
<td>A. Recruitment and Retention of Diverse Faculty &amp; Professional Staff</td>
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<tr>
<td>B. Latino Student Success Advisory Council</td>
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<td><strong>4. Serving Oregon with Regionalized Approaches</strong></td>
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<td>$510,000</td>
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<tr>
<td>A. “Hub and Spoke” Models for Educational Delivery to Rural and Remote Underserved Areas</td>
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<tr>
<td>B. Academically and Administratively Aligned “University College” for Central Oregon</td>
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<tr>
<td>C. New Instructional Facility for OSU-Cascades</td>
<td>Capital Request</td>
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<tr>
<td>PROPOSED ACTION</td>
<td>TOTAL REQUESTED</td>
<td>ONE-TIME ONLY PORTION</td>
<td>RECOMMENDED DISPOSITION</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
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<tr>
<td>5. Strengthening Critical Areas of Oregon’s Economy</td>
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<td>$5,755,000</td>
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<td>A. Sustainability Research Initiative</td>
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<td>B. Coordinated Support for Campus Sustainability Efforts</td>
<td>455,000</td>
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<td>C. Core Facilities for Proteomics and High Performance Computing</td>
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<tr>
<td>D. Doctoral Education in Sustainability, Health/Life Sciences, and Targeted Engineering Areas *</td>
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<td>E. Product Design Collaborative in the Portland Area</td>
<td>2,240,000</td>
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<td>F. ETIC – Making Sustainable Engineering a Strategic Priority</td>
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<td>G. Metals and Manufacturing “Collaboratory”</td>
<td>4,945,000</td>
<td>3,600,000</td>
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<td>6. Consolidation of OIT’s Portland Area Programs into a Single Location in Wilsonville</td>
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<tr>
<td>Total – All Academic Strategies Committee Proposed Policy Packages</td>
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<td>$6,651,700</td>
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* Proposal is scalable, depending on the number of students to be supported.