BUSINESS PLAN OUTLINE

I. BACKGROUND: YOUR SCHOOL, ITS STUDENTS, AND ITS PLACE WITHIN YOUR COMMUNITY
II. SCENARIO A: MULTI-SCHOOL NEWORG
III. SCENARIO B: MULTI-SCHOOL AFFILIATION
IV. SCENARIO C: SINGLE-SCHOOL
V. COMPARATIVE ANALYSIS
VI. RECOMMENDATIONS
BACKGROUND: YOUR SCHOOL, ITS STUDENTS, AND ITS PLACE WITHIN YOUR COMMUNITY

I. Mission Statement

II. People & Place
   a. Students. Please provide a profile of your students, where they come from, and where they go to work after graduating. Financial backgrounds and how they pay for school. Any survey or other information listing their priorities at the school.
   b. Campus Community. Please provide a profile of your faculty, staff and administration, their backgrounds, credentials and recognitions. Any survey or other information listing their priorities at the school.
   c. External Community. Please describe your school’s broader community. Its location and importance to the region. Its key relationships and affiliations. Its economic impact. Any survey or other information listing priorities for the school.

III. At-A-Glance
   a. Please provide a one-page summary of your school’s relevant statistics to help the Board and other audiences understand the school, and its position among its peer institutions.

IV. Oregon’s Investment in Your Students and Community
   a. Achievement Compact. Please provide your university’s compact with OEIB.
   b. The Value of Investment in Your Institution’s “Niche.” Please describe your “niche” (e.g., rural, first-generation, regional, STEM-oriented), and your competition. Please describe the positive consequences of state investment (e.g., rural economic development), and the negative consequences of disinvestment (e.g., low-income students shut out of upward mobility).
   c. Position within the State’s “Portfolio of Programs.” Please describe your degree programs, within the overall state “portfolio.” Is your current offering optimal for the state? If changes are appropriate, please summarize.
   d. Level of Investment.
      i. Investment-per-Degree. Please (OUS) provide a five-year history of all seven institutions plus state average. Please provide in absolute and relative terms (% of state average).
      ii. Cost-per-Degree. Please (OUS) provide a five-year history of all seven institutions plus state average. Please provide in absolute and relative terms (% of state average).
   e. Investment Rationale. Please explain why your level of investment-per-degree is, or should be, different from other state institutions (e.g., relative cost of serving your “niche”).

V. Financial Sustainability. Please place the school’s financial viability into perspective. What would be the impact of failure – to your students, your employees, your community, and the State?
SCENARIO A: MULTI-SCHOOL NEWORG

Sections:

1. Community Input
2. Financial Sustainability Plan
3. Outcomes
4. Enrollment, Revenues and Other Funding
5. Organization and Cost Structure

Section One: Community Input

I. Students
   a. Expectations of NewOrg.
   b. Advantages.
   c. Disadvantages.
   d. Impact of NewOrg on Student Choices.
   e. Lessons from national experience (from AGB).

II. Campus Community
    a. Expectations of NewOrg.
    b. Advantages.
    c. Disadvantages.
    d. Impact of NewOrg on Faculty/Staff Choices.
    e. Lessons from national experience (from AGB).

III. External Community
     a. Expectations of NewOrg.
     b. Advantages.
     c. Disadvantages.
     d. Impact of NewOrg on Community Choices.
     e. Lessons from national experience (from AGB).

Section Two: Financial Sustainability

I. Business-As-Usual Scenario
   a. Five-year-projections (OUS to provide data).
   b. Financial stress test (OUS to provide data).
   c. Strategic Priorities.

II. Sustainability Scenario
    a. Five-year projections. Please provide changes, if any, to Business-As-Usual financial projections based on adjustments to cost-structure, enrollment, funding.
    b. Risks and Upside. Please list relevant sources of risk and upside to achieving your financial projections.
Section Three: Outcomes

I. Degree Output
   a. Trend-Line. Please provide five-year history.
   b. Five-Year Projections. Please provide total degrees and % changes vs 2013.
   c. Variance to State Growth Percentages. Please explain rationale for either (a) tracking state 40-40-20 growth percentages (OUS to provide data); (b) exceeding state growth percentages; or (c) falling below state growth percentages. What barriers exist to achieving these targets?
   d. Strategic Priorities. Please list and prioritize the top 3-5 factors key to achieving these projections.
   e. Risk Factors. Please list and prioritize the top 3-5 risks to achieving these projections.
   f. Impact of Governance. Please summarize how, if at all, governance impacts your total degree output projections and/or the risk and confidence around realizing these projections.

II. Degree Composition
   a. Five-Year Projections. Please categorize degrees and % changes vs 2013.
   b. Variance to Existing Composition. Please explain how, if at all, degree composition is projected to change over the next five years. How will you grow and reduce programs in response to market demand? What barriers exist to achieving these targets?
   c. Strategic Priorities. Please list and prioritize the top 3-5 factors key to achieving these projections.
   d. Risk Factors. Please list and prioritize the top 3-5 risks to achieving these projections.
   e. Impact of Governance. Please summarize how, if at all, governance impacts your projections and/or the risk and confidence around realizing these projections.

III. Degree Quality
   a. Metrics. How do you propose tracking degree quality?
   b. Five-Year Projections. Please compare degree quality in five years, versus 2013.
   c. Strategic Priorities. Please list and prioritize the top 3-5 factors key to achieving these projections.
   d. Risk Factors. Please list and prioritize the top 3-5 risks to achieving these projections.
   e. Impact of Governance. Please summarize how, if at all, governance impacts your projections and strategies for improving degree quality, and/or the risk and confidence around realizing these projections.

IV. Graduate Profile
   a. Five-Year Projections. Please project degrees, per appropriate “niche” and % changes vs 2013.
   b. Variance to Existing Composition. Please explain how, if at all, graduate profile is projected to change over the next five years. How will you achieve these results? What barriers exist to achieving these targets?
   c. Strategic Priorities. Please list and prioritize the top 3-5 factors key to achieving these projections.
d. Risk Factors. Please list and prioritize the top 3-5 risks to achieving these projections.
e. Impact of Governance. Please summarize how, if at all, governance impacts your projections and/or the risk and confidence around realizing these projections.

Section Four: Enrollment, Revenues and Other Funding

I. Funding
   a. State Investment. Please describe assumptions for state funding and any changes, if any, you are proposing to funding allocation models.
   b. Resident Tuition. Please describe assumptions for changes to resident tuition rates.
   c. Non-Resident Tuition. Please describe assumptions for non-resident enrollment and tuition rates.
   d. Graduate Tuition. Please describe assumptions for graduate enrollment and tuition rates.
   e. Foundation. Please describe baseline assumptions for (a) total foundation size; and (b) marginal changes to operating budgets and capital expenditures.
   f. Research and Other Supplemental Funding. Please describe assumptions for additional funding sources.
   g. Impact of Governance. Please describe impacts of governance, if any, on enrollment and foundation marketing.

II. Financial Risk & Diversification
   a. Advantages & Disadvantages. Please summarize the primary advantages and disadvantages of the NewOrg model in mitigating financial risk to your institution.

Section Five: Organization and Cost Structure

I. Organizational Design
   a. Local Functions & Staffing. Please provide your current and expected organizational charts and budgets needed to achieve financial sustainability.
   b. Central Functions & Staffing. Please (OUS) provide current and expected central functions and staffing necessary to support your business plan.

II. Faculty & Staff Recruitment and Retention
   a. Personnel Plan. Please highlight any significant changes expected over the next five years.
   b. Strategic Priorities. Please list and prioritize the top 3-5 factors key to achieving these targets.
   c. Risk Factors. Please list and prioritize the top 3-5 risks to achieving these targets.

III. Collaboration
   a. Roles of HECC and OEIB. (HECC and OEIB to provide) Please summarize the new role of the HECC in incentivizing collaboration between institutions.
   b. Collaboration Opportunities. Please list and prioritize opportunities for collaboration between TRU schools and other institutions. Should the primary focus be (a) between TRU schools; (b) with others in the P-20 continuum; or (c) other (please specify)?
IV. **Cluster Logic**
   a. **Natural Synergies.** Please list and prioritize potential synergies under the NewOrg model under consideration (e.g., geography, size, emphasis on low-income or first-generation students, cost-per-degree).

V. **Oversight & Accountability**
   a. **Advantages.** Please list the primary advantages (e.g., focus on relative “equals”).
   b. **Disadvantages.** Please list the primary disadvantages (e.g., recruiting and building out new staff and board).
   c. **Comparables.** Please comment on the performance of other “consortia” (e.g., former OUS/OSBHE and national best practices).
SCENARIO B: MULTI-SCHOOL AFFILIATION

Sections:

1. Community Input
2. Financial Sustainability Plan
3. Outcomes
4. Enrollment, Revenues and Other Funding
5. Organization and Cost Structure

Section One: Community Input

I. Students
   a. Expectations of Affiliation
   b. Advantages
   c. Disadvantages
   d. Impact of Affiliation on Student Choices
   e. Lessons from national experience (from AGB)

II. Campus Community
   a. Expectations of Affiliation
   b. Advantages
   c. Disadvantages
   d. Impact of Affiliation on Faculty/Staff Choices
   e. Lessons from national experience (from AGB)

III. External Community
   a. Expectations of Affiliation
   b. Advantages
   c. Disadvantages
   d. Impact of Affiliation on Community Choices
   e. Lessons from national experience (from AGB)

Section Two: Financial Sustainability

I. Sustainability Scenario
   a. Five-year projections. Please provide revised forecasts, if any, to NewOrg financial projections based on adjustments to cost-structure, enrollment, funding.
   b. Marginal Analysis – Financial Projections. Please highlight changes to financial projections (e.g., cost structure, tuition).
   c. Marginal Analysis – Risks and Upside. Please highlight changes (e.g., faculty salaries).
Section Three: Outcomes

I. Degree Output
   a. Marginal Analysis – Degree Output. Please highlight changes to Degree Output.

II. Degree Composition
   a. Marginal Analysis – Degree Composition. Please highlight changes to Degree Output.

III. Degree Quality
   a. Marginal Analysis – Degree Quality. Please highlight changes to Degree Output.

IV. Graduate Profile
   a. Marginal Analysis – Graduate Profile. Please highlight changes to Degree Output.

Section Four: Enrollment, Revenues and Other Funding

I. Funding
   a. Marginal Analysis – Resident Tuition.
   b. Marginal Analysis – Non-Resident Tuition.
   c. Marginal Analysis – Graduate Tuition.
   d. Marginal Analysis – Foundation. Please describe baseline assumptions for (a) total foundation size; and (b) marginal changes to operating budgets and capital expenditures.
   e. Marginal Analysis – Research and Other Supplemental Funding. Please describe assumptions for additional funding sources.
   f. Impact of Governance. Please describe impacts of governance, if any, on enrollment and foundation marketing.

II. Financial Risk & Diversification
   a. Advantages & Disadvantages. Please summarize the primary advantages and disadvantages of the Affiliation model in mitigating financial risk to your institution.

Section Five: Organization and Cost Structure

I. Affiliation Partner
   a. Partner: {Name of Institution}.
   b. Criteria and Decision Process.
   c. Methodology. Meetings and dates, degree of engagement, etc.

II. Organizational Design
   a. Local Functions & Staffing. Please provide organizational charts and budgets.
   b. Central Functions & Staffing. Please provide organizational charts and budgets.
III. Faculty & Staff Recruitment and Retention
   a. Personnel Plan. Please highlight any significant changes expected over the next five years.
   b. Strategic Priorities. Please list and prioritize the top 3-5 factors key to achieving these targets.
   c. Risk Factors. Please list and prioritize the top 3-5 risks to achieving these targets.

IV. Collaboration
   a. Marginal Analysis – Collaboration Opportunities. How, if at all, does Affiliation change opportunities for collaboration within P-20?

V. Cluster Logic
   a. Natural Synergies. Please list and prioritize potential synergies under the Affiliation model under consideration (e.g., geography, size, emphasis on low-income or first-generation students, cost-per-degree).

VI. Oversight & Accountability
   a. Advantages. Please list the primary advantages (e.g., teaming with mature organization)
   b. Disadvantages. Please list the primary disadvantages (e.g., potential dilution of focus, cultural differences).
   c. Comparables. Please comment on effectiveness of national best practices employing Affiliation models.
SCENARIO C: SINGLE-SCHOOL

Sections:

1. Community Input
2. Financial Sustainability Plan
3. Outcomes
4. Enrollment, Revenues and Other Funding
5. Organization and Cost Structure

Section One: Community Input

I. Students
   b. Advantages.
   c. Disadvantages.
   d. Impact of Single-School on Student Choices.
   e. Lessons from national experience (from AGB).

II. Campus Community
   b. Advantages.
   c. Disadvantages.
   d. Impact of Single-School on Faculty/Staff Choices.
   e. Lessons from national experience (from AGB).

III. External Community
   b. Advantages.
   c. Disadvantages.
   d. Impact of Single-School on Community Choices.
   e. Lessons from national experience (from AGB).

Section Two: Financial Sustainability

I. Sustainability Scenario
   a. Five-year projections. Please provide revised forecasts, if any, to NewOrg financial projections based on adjustments to cost-structure, enrollment, funding.
   b. Marginal Analysis – Financial Projections. Please highlight changes to financial projections (e.g., cost structure, tuition).
   c. Marginal Analysis – Risks and Upside. Please highlight changes (e.g., faculty salaries).
Section Three: Outcomes

I. Degree Output
   a. Marginal Analysis – Degree Output. Please highlight changes to Degree Output.

II. Degree Composition
   a. Marginal Analysis – Degree Composition. Please highlight changes to Degree Output.

III. Degree Quality
   a. Marginal Analysis – Degree Quality. Please highlight changes to Degree Output.

IV. Graduate Profile
   a. Marginal Analysis – Graduate Profile. Please highlight changes to Degree Output.

Section Four: Enrollment, Revenues and Other Funding

I. Funding
   a. Marginal Analysis – Resident Tuition.
   b. Marginal Analysis – Non-Resident Tuition.
   c. Marginal Analysis – Graduate Tuition.
   d. Marginal Analysis – Foundation. Please describe baseline assumptions for (a) total foundation size; and (b) marginal changes to operating budgets and capital expenditures.
   e. Marginal Analysis – Research and Other Supplemental Funding. Please describe assumptions for additional funding sources.
   f. Impact of Governance. Please describe impacts of governance, if any, on enrollment and foundation marketing.

II. Financial Risk & Diversification
   a. Advantages & Disadvantages. Please summarize the primary advantages and disadvantages of the Single-School model in mitigating financial risk to your institution.

Section Five: Organization and Cost Structure

I. Organizational Design
   a. Local Functions & Staffing. Please provide organizational charts and budgets.

II. Faculty & Staff Recruitment and Retention
   a. Personnel Plan. Please highlight any significant changes expected over the next five years.
   b. Strategic Priorities. Please list and prioritize the top 3-5 factors key to achieving these targets.
   c. Risk Factors. Please list and prioritize the top 3-5 risks to achieving these targets.
III. **Collaboration**
   a. Marginal Analysis – Collaboration Opportunities. How, if at all, does Single-School change opportunities for collaboration within P-20?

IV. **Autonomy**
   a. Advantages of Autonomy.
   b. Disadvantages of Autonomy.

V. **Oversight & Accountability**
   a. Advantages. Please list the primary advantages (e.g., direct, focused board).
   b. Disadvantages. Please list the primary disadvantages (e.g., competing for board members).
   c. Comparables. Please comment on national best practices for schools of similar size and financial strength.
COMPARATIVE ANALYSIS

Sections:

1. Community Input
2. Financial Sustainability Plan
3. Outcomes
4. Enrollment, Revenues and Other Funding
5. Organization and Cost Structure

Section One: Community Input

I. Students
   a. Student Choices. Please rate expected impact of each governance structure on attracting, retaining and serving target student population (1 = unfavorable impact; 5 = favorable impact; state “no impact” if inconsequential).
   b. Rationale. Please cite supporting local and national evidence.

II. Campus Community
   a. Faculty/Staff Choices. Please rate expected impact of each governance structure on attracting/retaining quality faculty/staff (1 = unfavorable impact; 5 = favorable impact; state “no impact” if inconsequential).
   b. Rationale. Please cite supporting local and national evidence.

III. External Community
   a. General Community Support. Please rate expected impact on of each governance structure on general community support (1 = unfavorable impact; 5 = favorable impact; state “no impact” if inconsequential).
   b. Foundation Support. Please estimate annual foundation growth under each governance structure ($/yr).

Section Two: Financial Sustainability

I. Sustainability Scenario
   a. Priorities. Please list your top 3-5 strategic priorities for realizing financial sustainability.
   b. Execution Risk – short term. Given the urgency of achieving financial sustainability, what is the level of near-term disruption, and the commensurate level of uncertainty and risk, under each option? (e.g., NewOrg must build a new board, hire a new chief executive and staff, and rationalize staff functions. Affiliation must rationalize staff functions. Single-school must build a new board and hire local staff.)
   c. Execution Risk – long-term. Please rate each governance structure according to the following elements:
      i. Management Focus.
      ii. Track Record of Delivering Results.
Section Three: Outcomes

I. **Degree Output**
   a. Degree Output. Please summarize marginal differences.
   b. Risks and Upside. Please summarize marginal differences.

II. **Degree Composition**
   a. Degree Composition. Please summarize marginal differences.
   b. Risks and Upside. Please summarize marginal differences.

III. **Degree Quality**
   a. Degree Quality. Please summarize marginal differences.
   b. Risks and Upside. Please summarize marginal differences.

IV. **Graduate Profile**
   b. Graduate Profile. Please summarize marginal differences.

Section Four: Enrollment, Revenues and Other Funding

I. **Funding**
   a. Resident Tuition. Please summarize marginal differences.
   b. Non-Resident Tuition. Please summarize marginal differences.
   c. Graduate Tuition. Please summarize marginal differences.
   d. Foundation. Please summarize marginal differences.
   e. Research and Other Supplemental Funding. Please summarize marginal differences.

II. **Financial Risk & Diversification**
   a. Governance Ratings. Please rate expected impact of each governance structure on financial risk to your institution (1 = unfavorable impact; 5 = favorable impact; state “no impact” if inconsequential).

Section Five: Organization and Cost Structure

I. **Organizational Design**
   a. Local Functions & Staffing. Please summarize total organizational budget for each governance structure.
   b. Central Functions & Staffing. Please summarize total organizational budget for each governance structure.

II. **Faculty & Staff Recruitment and Retention**
   a. Strategic Priorities. Please rate expected impact of each governance structure on implementing personnel plans (1 = unfavorable impact; 5 = favorable impact; state “no impact” if inconsequential).

III. **Value Proposition**
   a. Low-Cost Option. Please identify the governance structure that provides the low-cost option, net of any differences in non-E&G funding.
b. Marginal Cost Increases. Please provide the incremental cost increases of the two other governance structures (again, net of any differences in non-E&G funding). Assuming the same level of state investment under each governance structure, express the incremental cost increases in terms of costs to students.

c. Value to Students. Please summarize the value proposition of each governance structure to students. For example, the low-cost structure lowers student tuition and debt levels. For the higher-cost options, what incremental values are the students purchasing?

IV. Collaboration

a. Strategic Priorities. Please rate expected impact of each governance structure on implementing collaboration plans (1 = unfavorable impact; 5 = favorable impact; state “no impact” if inconsequential).

V. Cluster Logic

a. Advantages. Please summarize the major advantages of each governance structure.
b. Disadvantages. Please summarize the major disadvantages of each governance structure.

VI. Oversight & Accountability

a. Advantages. Please summarize the major advantages of each governance structure.
b. Disadvantages. Please summarize the major disadvantages of each governance structure.
c. Ratings. Please rate expected impact on of each governance structure on realizing effective oversight & accountability (1 = unfavorable impact; 5 = favorable impact; state “no impact” if inconsequential).
RECOMMENDATIONS

Sections:

1. First recommendation
2. Second recommendation