



Background

A key principle of the Board's long-range plan is to manage the Oregon University System and its institutions as a portfolio. The plan specifies that:

OUS will operate as a portfolio of institutions with the objective of delivering optimal overall outcomes for the benefit of all citizens across Oregon. The Chancellor and institution presidents are jointly responsible and accountable for the successful accomplishment of OUS goals and outcomes.

- *The Board expects that every OUS institution will contribute in each one of the OUS outcome areas, but not necessarily to the same degree or in the same ways. Under the overall direction of the Board, the Chancellor will work with the individual institutions to establish campus goals that together support achievement of overall OUS goals in each outcome area.*
- *The Board expects that each institution will build on existing capabilities and areas of excellence to maximize its contribution to OUS outcomes and goals. At the same time, the Board believes that to maximize the efficiency and effectiveness of the system as a whole, not all programs and functions will be offered at every institution within OUS.*
- *Although institutions should have sharply defined missions, goals, and long range plans, the Board expects and encourages the institutions to work together to maximize the efficiency and effectiveness of OUS.¹*

What should be in the portfolio if the goals of the system are to be achieved? First, there should be undergraduate programs that help ensure an educated citizenry, provide the foundation of knowledge and skills that prepare students for employment, for further learning or training, for satisfying lives and contributions to their communities.

A second element of the portfolio is graduate programs that produce more advanced capabilities and specialized contributions to society and the work force. A third dimension of the portfolio is research activities that advance knowledge, innovation, and economic development.

Finally, the portfolio must have the capacity to serve the diverse and geographically dispersed populations of the state, ensuring that the opportunity for higher education is available to all. This aspect falls within the charter of the Student Participation and Completion subcommittee.

¹ Oregon State Board of Higher Education, *An Investment in Oregonians for Our Future: A Plan to 2025 for the Oregon University System*. March 2007, pages 22-23.

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Charge of the OUS Portfolio Development Subcommittee

To advise the subcommittee chair and to inform the deliberations of the Strategic Initiatives Committee, the OUS Portfolio Development Subcommittee will provide analysis and identify options regarding elements of the OUS portfolio and the potential ways in which each institution may contribute to the overall OUS portfolio.

Scope of Subcommittee Work

The subcommittee's overall focus will be on the following areas:

- Key mission elements of OUS institutions, including program mix and focus, characteristics of students served, and the commitment to and nature of research and scholarship;
- Cost and revenue implications of the mission elements; and
- Critical partnerships and collaborations.

The subcommittee's work for the remainder of 2007 will focus specifically on two areas: (1) graduate and professional programs among all seven OUS universities; and (2) the overall portfolio contributions of the smaller universities (Eastern Oregon University, Oregon Institute of Technology, Southern Oregon University, and Western Oregon University). Other areas of subcommittee focus – undergraduate program delivery and the role of and commitment to research – will begin to be addressed in 2008. The work conducted in 2007 is expected to better inform and help shape the topics and analysis of the later work.

Deliverables

Although a more exact description of deliverables will require subcommittee discussion, the expectation is that by November 1, 2007, the subcommittee work will provide:

- A clear picture of the graduate and professional program offerings now in place in OUS;
- An analysis of where there are gaps;
- Analysis of where there is potential for collaboration or other mechanisms to achieve greater cost effectiveness in how graduate and professional programs are delivered;
- An analysis of all of the mission elements, costs, and revenues of the smaller universities, with a focus on how each one currently and potentially contributes to the achievement of the four broad goals of the Oregon University System; and
- Identification or refinement of questions and areas to be addressed by the subcommittee in the future, specifically undergraduate program delivery and research.

Key Questions

The questions listed below apply to the broader focus of the subcommittee. However, the target of these questions for the subcommittee's work of 2007 will be on the two areas noted above – graduate and professional programs across all OUS institutions, and all elements of the smaller universities' contributions to the OUS portfolio.

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1. What are the **key mission elements** of each institution, such that collectively they optimize the achievement of the Board's goals for 2025?
 - a. What is the desired **program mix and focus** for each institution?
Undergraduate? Graduate?
 - b. What are the characteristics of the **students served** by each institution? How do those characteristics shape the discussions and recommendations of the Participation and Completion Subcommittee?
 - i. Academic preparation and admissions selectivity
 - ii. Demographic characteristics – income level, first generation, ethnicity, rural/metro, other states, international
 - c. What is the commitment to and nature of **research and scholarship** at each institution?
2. What are the **cost implications** of this set of mission elements?
 - a. Pedagogical models
 - b. Faculty workload, mix, compensation
 - c. Institutional support – libraries, instruction and research facilities, technology
 - d. Student services and support
3. What are the **revenue implications** of this set of mission elements?
 - a. Tuition
 - b. External research
 - c. Private sources
 - d. State funding
4. What are the critical **partnerships and collaborations**, current and potential?
 - a. Administrative cost sharing
 - b. Academic program collaborations across institutions and sectors
 - c. Industry partnerships
 - d. What are the connections to Portland? How do they shape the discussions of the Portland Higher Education Services Subcommittee?
5. How does all of the above shape the discussions of the Governance subcommittee?
6. What common as well as individualized metrics should be used to gauge the contributions of each institution to the overall OUS portfolio?
7. What should be the focus and frequency of Board review of the OUS portfolio, including mission, organizational structure and governance, operational models for managing costs and revenues, and partnerships and collaborations?

The focus on graduate and professional programs would involve developing criteria for determining whether we have the optimal mix of disciplines, as well as the most effective and efficient allocation among institutions. Among the criteria might be:

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- Are the disciplines in which graduate and professional programs are offered well aligned with Oregon's economy (or should they be)?
- Are they aligned with the needs and interests of our actual or potential student market?
- Are they productive, or what is the relationship between inputs (costs) and outputs (graduate and professional degrees awarded, and perhaps research and research results generated)?
- Are the programs compatible with the mission of each university?
- Are they collectively efficient? Is there unnecessary duplication?
- Are they offered where the students are, where the relevant learning resources are?
- Are they serving community needs?