
CREATING THE ▼ FUTURE

A Plan for

Beginning the '90s



CREATING THE FUTURE: A Plan for Beginning the 90's



January, 1990

Revised Plan

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Oregon State University: Our Values and Guiding Principles

Oregon State University is among the leading comprehensive teaching and research universities in the nation. Our mission as a land grant university is to serve the people of Oregon, the nation, and the world through education, research, and service. Through our dedicated teaching, through our pursuit of knowledge, and through our extended relationships to the broader society, we seek continually to improve our contributions to the general welfare.

Values

How we accomplish our mission is as important as the mission itself. The following values are fundamental to our success:

People--Our people - students, faculty, staff, and alumni - are our strength. They are the source of our creativity, they determine our reputation, and they provide our vitality.

Respect--All our people are important contributors. Respect, humanity, and integrity are required in our treatment of each other.

Openness--In the classrooms, laboratories, studios, and field stations, our efforts are open to challenge and debate.

Truth and Truths--We seek truths in our pursuit of knowledge. But we know that there is no such thing as "the truth." Understandings in the sciences, arts, and humanities change. We challenge dogma when we encounter it in our classrooms, in our laboratories and studios, and in our role of serving the broader society.

Guiding Principles

- Students are our most important clients. The quality and completeness of their education is our top priority.
- We have a responsibility to society to contribute to its social, aesthetic, and economic well-being.
- Our social responsibility extends to offering informed criticism even when that criticism may not be well received. We maintain an internal environment that will nurture this important contribution.
- Flexibility, change, and constant improvement are essential to our continued success.
- In instruction, research, and service activities, we honor and impart principles of academic honesty, freedom, and integrity.
- Diversity is a key to our success. Not only are our doors open to men and women alike without regard to race, ethnicity, personal belief, disability, or sexual preference, but we also have a moral obligation to open the doors wider for any groups that are under-represented or that have suffered from discrimination.

CREATING THE FUTURE: A Plan for Beginning the 90's

INTRODUCTION

Oregon State University began a campus-wide strategic planning process several years ago. In 1987, after more than two years of activities involving a large segment of the university community, a document titled *Preparing for the Future: Strategic Planning at Oregon State University* was adopted. This document articulated broad goals for the university, established objectives for each goal, and detailed actions needed to achieve those stated objectives. The years of attention to strategic planning also produced:

- A completely revised mission statement,
- An assessment of the external environment and an evaluation of institutional capabilities,
- Management plans for colleges and service units,
- Task force analyses of broad university issues.

Preparing for the Future provided that "... the entire plan will be thoroughly reviewed and revised every two years." That provision was adopted in 1987. We are now entering the decade of the 90's and we are prepared with a thoroughly revised and re-focused strategic plan.

Revision of the strategic plan has coincided with preparation for the decennial reaccreditation review of Oregon State University by the Commission on Colleges of the Northwest Association of Schools and Colleges. Reaccreditation requires a period of institutional self-study prior to visitation by an evaluation committee. The traditional self-study involves most members of the university community in the development of information and the analysis of many specific questions. Oregon State University will use the revised plan as our "non-traditional" self-study. This is appropriate because both planning and accreditation self-study are essentially similar processes involving the articulation of clear goals, the assessment of performance, and the choice of future activities.

The revised planning document will serve as the reaccreditation self-study. The university's accrediting association encourages established institutions to use the period of self-study to achieve their own purposes and that is the approach being taken by Oregon State University in preparation for its 1990 reaccreditation review.

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BACKGROUND

The process used to prepare the revised plan and the revised plan itself employ a variety of assumptions, terms, and principles. These are presented in following sections.

Purposes

Why do strategic planning? Phrase-makers distinguish **operational planning** and **strategic planning** by characterizing conventional planning as interested in "doing things right" while strategic planning focuses on "doing the right things." Although such phrase-making is too facile (any planning involves both selecting the right things and doing things right), the differentiation does suggest the primary purpose of strategic planning: to set directions for an organization in response to an assessment of an external environment over which the organization has little control.

Strategic planning should set directions. That, experts on the subject agree, is the primary purpose for strategic planning. However, the very process of planning can provide other gains. These benefits, intrinsic to the process of planning, are part of the reason for doing planning and they have influenced the design of procedures for revising the plan. Major subsidiary purposes for planning are:

- **Communication:** The efforts to update and revise the strategic plan have had, as a principal objective, the communication of information about priorities. Plans often avoid establishing priorities by encompassing all conceivable interests. However, whether articulated or not, priorities always exist. The effort to revise the strategic plan has emphasized the need to make priorities explicit.
- **Feedback/Feedforward:** The strategic planning effort of two years ago has been characterized as "bottom-up" since the university's plan emerged from unit plans and the efforts of numerous "grass roots" working groups. The current revision efforts use a different "feedback/feedforward" design in which, for example, deans should expect to receive clear statements of what departments intend to do in the next two years and departments should expect to receive clear information from deans as to what directions will be supported. Being neither bottom-up nor top-down, the revised planning processes proceed in parallel at various levels with opportunities for interaction and *mutual* adjustment.
- **Manageability:** Necessarily, the university's first effort at strategic planning was a major effort involving most segments of the university in activities that were out of the ordinary. The alignment of plan revision with accreditation self-study is but another *ad hoc* approach to strategic planning. The university's planning efforts need to become as routine as is currently the case for preparing a budget or a schedule of classes. The enormous effort of several years ago can not be repeated every two years and the efforts to revise the plan have had, as a purpose, the reduction of efforts to manageable and sustainable levels. This has been done by reducing the number of goals and objectives to be considered; restricting

attention to the level of goals and objectives, leaving specific planning actions to unit plans; and moderating the number of people asked to participate until such time as drafts were available for people to critique. These steps facilitate routine planning.

Terms

Consistent with the literature on planning, the term **mission** is used to identify the broadest and most fundamental purposes providing guidance and meaning for the university's programs and planning. **Goals**, as targets, identify directions to be pursued. **Objectives**, or standards, result when goals are applied to organizational activities and specific, observable situations are targeted for accomplishment. Put simply: missions are to be served, goals are to be pursued, and objectives are to be achieved.

Preparing for the Future included a finer level of detail: the planning action. For each objective, specific activities were identified that would be taken to achieve the objective. The current revision does not contain that level of detail. It emphasizes strategy, not operation. More operational considerations will be found in plans developed by academic and support units.

Strategic planning sets directions. Consequently, strategic plans may be briefly stated and need not be detailed. Operational (or "tactical") planning follows upon choice of strategies, will be detailed, and may be thought of as the implementation of strategic planning.

In universities, and other complex, multi-purpose organizations, the distinction between strategic and operational planning requires a bit more sophisticated approach. Strategic planning was explicitly designed for organizations attempting to succeed in a highly competitive situation where the organization had little control over the external environment and reasonable (hierarchical) control over the organization's internal environment. Strategic planning is easiest to use when "winning" is something that can be agreed upon and measured. Think of chess, business, ... war. Universities have multiple, competing purposes. Furthermore, universities have found that those multiple purposes are best served by procedures that emphasize collegial rather than hierarchical decision making. As a result, what are identified as the strategic goals for an organization like a university will be a blend of strategic opportunities, broadly supported traditional aspirations, and more tactical and operational considerations.

Relation to the 1987 Plan

Much was accomplished in the 1987 planning effort. *Preparing for the Future* described itself as "a guide for change and a call to action." It recognized the need to go further: to integrate strategic planning with budgeting, to clarify priorities, to consider the magnitude of resources required for implementation, to review progress in each planning unit semi-annually, and to assign responsibility and timetables for the achievement of actions and objectives. Furthermore, the planning document pointed out that, for the planning effort to be dynamic and ongoing, there would have to be constant participation by Oregon State University faculty, staff, students, alumni, and external groups.

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The 1987 document laid the fundamental groundwork for implementing strategic planning at Oregon State University and presciently identified the additional steps that would be necessary to achieve strategic planning. The initial promise of the 1987 effort has not been fully realized. This is due in part to events that could not be foreseen in 1987 and is due in part to our learning - through the earlier experience - of improvements that need to be made in conceiving of strategic goals and objectives.

In part, the 1987 effort was overwhelmed by events, some of which were set in motion as part of the strategic plan: efforts were invested in the development of a new program for the general education of our undergraduates; all courses, degree requirements, and instructional programs had to be converted to the semester system; then, innovations in the semester curricula had to be reconverted to quarter system equivalents; and there were several rounds of program review initiated by the need to make budget reductions. There simply was not the human time or energy available for the "constant participation" envisaged in 1987.

Much happened between 1987 and 1989. A fully articulated strategic planning process should - in demanding times such as those recently experienced at OSU - reduce overload, not exacerbate it. Clear and agreed upon goals should structure and simplify the more operational decisions that have to be made when designing a general education program, revising a college's curriculum, or reviewing programs for possible reduction or elimination. *Preparing for the Future* established certain priorities that were useful as general guides. However, people using the 1987 plan sometimes found the plan too ambitious in scope and, occasionally, somewhat unwieldy to manage. As a result of these experiences, the Accreditation Steering Committee decided strategic goals will be relatively few in number, the objectives established should not exceed the number which can be reasonably pursued and monitored, objectives should be based upon realistic assumptions about the availability of additional resources, and priorities need to be clearly established.

Key Principles

Efforts to revise strategic plans were based upon a number of principles. Several of the most important principles should be kept in mind in interpreting the plan.

- **Marginality:** Most of what the university is committed to doing will not change from year to year. Efficient strategic planning will focus on the margin, on the areas where opportunities are perceived or where needs for change, adjustment, or improvement are identified. Consequently, **strategic goals will not encompass all purposes of the university and may not include those university goals which are most central and longest-standing.**
- **Realism:** Planning efforts will focus on what is realistically possible.
- **Immediacy:** Planning efforts will emphasize the immediate: actions that can be taken over the next two or three years.
- **Staff Centered:** Because of extraordinary demands that have been placed upon faculty for university service during the last two years, the initial burden of revising and updating plans has been carried by administrators and their staff with provision made for fuller and effective involvement when there were plans to react to.

- **Flexibility:** The process of revising the plan involved diverse academic schools and colleges as well as many other parts of the university. Units differ widely in structure, management style, and in the importance attached to doing strategic planning. Procedures were flexible to accommodate that diversity and to obtain the benefits that reside in such diversity.
- **Planning, not plans:** Strategic planning is a behavior, a style of management and decision making. Planning is process, not paper. Indeed, this strategic planning document is simply a snapshot sure to start losing relevance as soon as it is finalized. Planning processes, however, are continual and need not lose relevance. Consequently, the revision effort has emphasized refining, experimenting with, and implementing management processes and the preparation of paper has been de-emphasized.

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THE PLANNING PROCESS AT OREGON STATE UNIVERSITY

Strategic plans have been reviewed and revised at two levels: for the university, and for each of the academic and service units. The same planning purposes and principles were prescribed for activities at both levels. Efforts by academic and service units will be briefly summarized; procedures used at the university level - those producing this document - will be described in more detail.

Developing Unit-Level Plans

In 1987, schools and colleges and service units developed strategic plans. These "planning units" have reviewed and revised their plans during the last year. The planning units are:

Unit	Planning Leader
The 12 Colleges	Deans
Continuing Higher Education	Director, Continuing Higher Education
Graduate School	Dean, Grad School
Research	Dean, Research
Extension Service	Director, CES
International Education, Research, and Development	VP, Research, Graduate Studies, & International Programs
Library	Director, Library
Academic Affairs Units	Assoc VP, Academic Affairs
Student Affairs Units	VP, Student Affairs
University Relations	VP, University Relations
Intercollegiate Athletics	Director, Intercollegiate Athletics
Finance and Administration	VP, Finance & Administration
Faculty Senate	Senate President

Planning units were not provided with any prescribed forms to complete or particular procedures that had to be followed. When planning units raised questions about how to proceed, they were strongly encouraged to avoid asking "what does the university want?" and, instead, to ask "what suits our needs?" As a result, widely varying planning procedures were used and the plans which have resulted vary considerably in structure, degree of detail, and underlying or implicit assumptions about the relationship of planning to decision making.

While a flexible process was used to incorporate the diversity and creativity of planning units, planning principles were furnished to planning units. Instructions also provided that, whatever procedures were used by a planning unit, those procedures should: focus on plans for the next biennium; rely heavily upon administrators and their staff for development of drafts while providing for meaningful faculty and staff input when there were clear plans available for them

to react to; provide for planning by subunits; provide for review and revision of internal and external assessments prepared several years ago; provide information on priorities; provide for clear and explicit feedback; and avoid reliance on *ad hoc* arrangements.

Plans have not yet been revised for three of the twenty-four planning units. The College of Education has been deeply involved in an extensive redesign of academic programs in response to changing and not always clear external forces; consequently, there was neither the staff time nor the external stability required to do useful strategic planning. Funding levels for the Athletic Department were very unclear during 1988-89; that uncertainty has been lessened and the Athletic Department will complete a revised strategic plan during 1989-90. The position of Vice President for University Relations was vacant during the last year and the plan for University Relations has not been revised; however, the university's external relations programs were the subject of a detailed analysis by external consultants and the University Marketing Committee has drafted a detailed marketing plan.

Developing the University-Level Plan

Development of revised goals was the first major step in revising the university's strategic plan. A relatively small number of goals were sought that were consistent with the mission and strategic advantages of the institution. Discussions were held with members of the commission that prepared the 1987 plan. Internal and external assessments were reviewed, as were major policy statements, suggestions, and actions by university leaders. Goals were drafted which maintained, wherever possible, language used in the 1987 document *Preparing for the Future*. Drafts were discussed with the principal university officers, with the Deans' Council, with the Faculty Senate Executive Committee, with principal officers of the Associated Students of Oregon State University, and with the Executive Committee of the Oregon State University Alumni Association. In addition, comment was sought from all Faculty Senate standing committees, the standing committees of the Associated Students, and from the Long-Range Planning Committee of the Alumni Association. Ten revised goals resulted.

Development of objectives for each of the ten revised goals was the next major step. The Accreditation Steering Committee sought a relatively small number of objectives for each goal; three to eight objectives was the rule of thumb. The objectives were to provide focus for efforts over the next two years, were to be specific enough to provide means for assessing progress, and were to be ranked in order of priority.

Several steps were taken to prepare draft objectives. First, assessments were made of progress toward the goals, objectives, and actions contained in the 1987 plan. Vice presidents reported on the status of each of the 437 actions proposed in the earlier plan. In addition, for each of the twenty-one goals contained in the 1987 plan, individuals knowledgeable about the subject matter of the goal were identified. These experts were asked to identify and assess accomplishments, failures, and continuing needs.

For each of the ten draft revised goals, temporary advisory groups were appointed. These groups were charged with drafting objectives. As background, each group was provided with assessments of progress made toward those 1987 goals relevant to the group's assignment, portions of unit plans relevant to the group's assignment, and any relevant written suggestions

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received during earlier review of draft goals. While such background was provided, the temporary advisory groups were also encouraged to exercise their creativity and to not feel bound by what might be contained in unit plans or expert assessments. Draft objectives prepared by the temporary advisory groups were revised by the Accreditation Steering Committee.

The mission statement, thoroughly revised in 1987, was also considered at each stage of development of a revised plan. The statement continues to accurately express Oregon State University's mission. The mission statement identifies our most fundamental purposes. But, it does not include the values and principles we adhere to as we fulfill our mission. A statement of values and principles was drafted and was part of the processes of review and revision used for the revised strategic plan.

The draft revised plan was circulated among the university community during October and November of 1989. Drafts were sent to all administrative units for circulation within the units; copies of the draft and requests for comments were provided to organizations of faculty, students, alumni, classified staff, and management service personnel; and the draft was the subject of presentations to the Faculty Senate, the Deans' Council, and a Town Meeting. These steps lead to the identification of a number of improvements which have been incorporated in the plan.

Integrating Unit-Level and University-Level Plans

Planning has simultaneously proceeded at two levels: at the university level and among planning units. The relationship between the two levels is not hierarchical; the university plan is not a sum of unit plans and unit plans need not be simple expressions of decisions made for the university-level plan. Universities obtain strength through decentralized decision-making and, in such an environment, planning at different levels is integrated through a process known as "mutual adjustment."

Formal opportunities for mutual adjustment have been built into the process of revising the plan. Draft university-level goals were developed well prior to the time when unit plans were due. University-level objectives were developed after unit plans were drafted and the temporary advisory groups reviewed unit plans prior to developing university objectives. Many unit plans, submitted last June in draft form, are being reviewed at a time when a more fully articulated university-level plan is available. University objectives will be incorporated in the plans of designated units.

CREATING THE FUTURE

Today's efforts in our classrooms, laboratories, institutes, studios, and field stations will contribute to tomorrow's economic, social, and cultural vitality. Our research and other creative activities meet social, intellectual, and aesthetic needs. We make extended efforts to provide knowledge to those who can benefit from it. Our students will earn important positions throughout Oregon and the world and the education they receive today will affect the contributions they make decades hence. In all these ways, Oregon State University helps create the future.

Creating the future. That has been and continues to be our fundamental responsibility. Our mission continues to be:

OREGON STATE UNIVERSITY serves the people of Oregon, the nation, and the world through education, research, and service.

Oregon State extends its programs throughout the world, and is committed to providing access and educational opportunities to minorities and to disabled and disadvantaged persons.

Oregon State has an inherent commitment to provide a comprehensive array of high-quality educational programs in the sciences, liberal arts, and selected professions. The University encourages students, both on and off campus, to develop an enriched awareness of themselves and their global environment.

Through research, Oregon State extends the frontiers of knowledge in the sciences, liberal arts, and in all aspects of natural, human, and economic resources. Oregon State contributes to the intellectual development and the economic and technological advancement of humankind.

As a Land Grant and Sea Grant university, Oregon State has a special responsibility for education and research enabling the people of Oregon and the world to develop and utilize human, land, atmospheric, and ocean resources. Unique programs of public service throughout Oregon supplement campus-based university teaching and research.

The pages which follow present ten goals. For each goal, related goals from the 1987 plan are listed as are major accomplishments during the last two years. Continuing challenges are also identified, followed by objectives for the current revision of the university's strategic plan. The report of accomplishments and continuing challenges draws upon the assessments of progress made on the 1987 plan that were solicited from a wide range of colleagues knowledgeable about particular areas covered in the plan.

The "continuing challenges" identified on the following pages are not always fully addressed by objectives contained on the following pages. Many of the challenges identified in the following pages are the result of funding levels that do not support all that we wish to achieve. Specific goals and objectives - and the overall flavor of the plan - have been developed with an eye to improving the resources available. But, realistically, we must recognize that important challenges facing us as we complete the current planning document will also be facing us as we prepare subsequent revisions.

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Achievement of many of the objectives in the revised plan would require significant expenditures. The plan does not assume that there will be major increases in the level of funding that Oregon State University receives from State general appropriations. Consequently, the objectives should be viewed as guides for seeking new sources of support as well as for the reallocation of resources. The plan specifically establishes an objective of periodically reviewing programs in order to shift resources to the most needed areas.

Priorities are set. Under each goal, objectives are listed in order of priority. The selection of ten goals from among the larger number in the 1987 plan establishes some priorities. And one goal, the first, differs from the others in several respects. That goal - to serve people through instruction, research, and extension - is more fundamental than the others. It comes directly from the mission statement. The goals which follow it are subsidiary and provide means for advancing the first goal. The first goal also makes clear that instruction, research, and extension are not values to be pursued simply as ends in themselves but, rather, are important to the university to the extent that they serve people.

Universities have many goals and objectives and those for Oregon State University were expressed in the 1987 plan. The current revision identifies a smaller set of goals, those that will receive particular attention over the next several years. **The smaller number of goals is intended to provide a sharper focus to the plan. However, the goals selected for this revision do not replace the more complete range of goals in the earlier document and it is quite likely that, in the next biennial revision, a different subset of goals will become the focus.**

Operational considerations - the specific actions that will promote the objectives - are not contained in this strategic plan. Planning actions - with responsibilities assigned and time tables - will be incorporated in unit plans and this is discussed in the section on implementation. The absence of planning actions at this stage is a break with the approach taken in 1987. In part the reasons are pragmatic: to limit the degree of detail requiring wide university involvement to a level that can be reasonably and routinely repeated every two years. The absence of planning actions is also intended to foster flexibility. Objectives are likely to remain constant over several years but the actions best suited to achieving the objectives may very well change.

The decision to exclude specific planning actions at this stage is also based upon a particular view of planning and the most efficient use of each of our abilities. In the current approach, widespread involvement is focused upon deciding what should be achieved and leaves it to those knowledgeable about particular areas to work out the best ways to achieve objectives. These "knowledgeable others" are, of course, each of us in our own areas of specialization. To work, the current approach requires regular attention to the assessment of results and you will find, in the discussion of plan implementation, that the monitoring of results is emphasized. In preparing plans for both 1987 and 1990, there was attention to setting directions; that is a primary purpose of strategic planning. In preparation for the 1990's, however, attention has shifted from inputs to outputs with a view that it is the results that matter.

Themes

On the following pages, the same objective can be found in more than one place. What might appear as overlaps and redundancies are really evidence of the organic and interdependent character of the university. Four general concerns emerge as important to more than one or two goals. These themes provide a degree of unity and coherence to the numerous individual objectives. They follow in order of their importance to pursuing the ten goals which comprise the revised plan.

Teaching

Again and again, groups studying particular goals would independently arrive at the same conclusion: the recognition accorded excellence in teaching, and the rewards accruing to excellent teachers, must be substantially increased. This was found to be central to the key goals of serving people, aiding students in realizing their full potential, recruiting and retaining faculty committed to excellence, and recruiting outstanding students. **To strengthen programs and rewards that promote and recognize good teaching is the top priority objective for the number one goal.**

Facilities

Inadequate facilities - and equipment - are obstructing progress toward a number of goals. An advisory group reports that inadequate working environments are as significant as are low salaries in impeding our ability to recruit and retain faculty and staff committed to excellence. Improvements in research facilities and equipment are important to the goal of sustaining and expanding research excellence. Well-equipped, modern classrooms are necessary to obtain our top priority of excellence in teaching. Instructional laboratories need major improvements. New facilities are needed to support library services. A day-care facility is needed to attract and retain faculty and staff committed to excellence, to attract outstanding students, and to provide an environment that aids students in achieving their fullest potential. While walls, wiring, and water lines are not very glamorous, the university's physical infrastructure has seriously suffered from deferred maintenance.

Cultural Diversity

The increasingly interdependent international system affects students, scholarship, and service activities. This is recognized in a half-dozen objectives designed to sustain, coordinate, and sharpen the university's international focus. Colleagues studying ways to aid students in achieving their fullest potential report a need to increase students' global awareness and their interest in international educational experiences. The university is missing other important opportunities for enrichment through cultural diversity; a number of objectives are directed at expanding the educational and professional opportunities for members of minority, female, disadvantaged, and disabled populations and the plan recognizes a need to diversify the curriculum.

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University Relations

The university's need to improve relations with its constituencies is the focus of one goal. Advisory groups working on other goals also identified needs to improve university relations. More actively marketing our highest quality instructional programs was seen as a step toward increasing enrollments of outstanding students. Efforts to publicize research and artistic achievements were identified as one element in the plan to sustain and expand research and artistic creativity.

1 SERVE PEOPLE THROUGH INSTRUCTION, RESEARCH, AND EXTENSION

Oregon State University responds to, and prepares students to respond to, the challenges facing Oregon and the world. These challenges have social, scientific, technical, and policy dimensions and require the application of descriptive, analytical, and valuative skills. Pursuit of this goal requires a firm commitment to the highest quality of teaching; two-way communication with many external groups; sound basic and applied research programs; strength in the sciences, the liberal arts, and in the professions; and the ability to organize for the pursuit of multi-disciplinary and interdisciplinary endeavors. Oregon State University is better positioned to pursue this goal than is any other educational institution in Oregon.

Related 1987 Goals

- Enhance the university environment for learning, creativity, exchange of ideas and personal development.
- Contribute to the social and economic development of Oregon.
- Extend research-based knowledge to Oregon citizens through Extension and service programs.
- Focus the University's continuing education efforts.

Major Accomplishments Related to 1987 Goals

The accomplishments reported on all of the following pages support the first goal. Accomplishments include:

- The entire curriculum - all courses and degree requirements - has been reviewed and revised.
- A new baccalaureate core curriculum has been developed for the general education of all undergraduates.
- There have been increases in already high levels of proposal writing and contract and grant funding.
- With thorough reorganization and reorientation, Continuing Higher Education has experienced considerable success in conducting seminars for special audiences and in using non-traditional delivery methods such as TV courses and teleconferences.
- A major "needs assessment survey" is under way to determine the market for an "Evening/Weekend college."
- With key faculty and facilities, OSU has been and will continue to provide leadership in the State System effort to participate in Ed-Net.
- The large Forestry Continuing Education program has made major contributions to extending research-based knowledge, promoting economic development, and focusing the university's continuing education efforts.
- Research programs, such as those of the Forest Research Laboratory, the Agricultural Experiment Station, Sea Grant, and a number of colleges, continue to be directly focused on helping economically important Oregon industries while other colleges have taken steps to link faculty research operations with business and trade associations.

- The Extension Service has prepared well-defined program initiatives, is actively involved in assisting with the State's focus on a "children's agenda," has conducted impact studies, and has developed new promotion and tenure guidelines for faculty.

Continuing Challenges

Many of the challenges identified on the following pages affect pursuit of the first goal. But, one encompassing challenge needs articulation. Oregon State University has long been motivated to serve. So often, we have added programs thinking that the costs - a few more students in a classroom, a few more hours added to a professor's week, a few more evenings spent in the laboratory, a few more miles driven - were negligible. This can not continue. We must recognize that net losses may result if, by expanding one service, we dilute the quality of other services. Having recognized that, we face an additional challenge: not to become wedded to the *status quo* in times of fixed budgets. While new programs must be critically examined to recognize their real costs, existing programs must also be regularly reviewed to identify opportunities for reallocating our efforts to serve people. That is a major challenge. Others are:

- Meaningfully recognizing, promoting, and rewarding excellent teaching;
- Impressing upon those we serve that there are crucial links between basic research and applied ends, and excellent teaching;
- Balancing our excellence in addressing technical problems faced by industries with attention to the social problems faced by the wider polity;
- Assuring that shifts in enrollment levels among the colleges do not threaten educational quality.

Objectives

- 1.1 Strengthen programs and rewards that promote and recognize good teaching at both undergraduate and graduate levels.
- 1.2 Adequately staff academic programs that are essential to the university's mission in order to serve fully all admitted students.
- 1.3 Adequately support programs of research and artistic creativity that are essential to the university's mission to serve people.
- 1.4 Periodically review university programs to identify low priority programs; shift resources to most needed areas.
- 1.5 Improve the availability of degree programs to nontraditional students through increased use of evening and weekend classes, and by continuing the university's leadership in the use of Oregon Ed-Net for higher education.
- 1.6 Continue to develop and implement criteria and procedures for assignment of faculty rank, evaluation, and promotion and tenure which recognize the varied roles of faculty in university programs.
- 1.7 Involve university faculty and staff in extension programming through interdisciplinary planning, cooperation, and collaboration with other state and federal agencies to help Oregonians identify and solve problems, develop leadership, and manage resources wisely.

2

MAINTAIN A HIGH QUALITY AND NURTURING EDUCATIONAL ENVIRONMENT THAT AIDS STUDENTS IN ACHIEVING THEIR FULLEST POTENTIAL

Major steps have been taken to improve the quality of the services provided to students. The university has recently given considerable attention to the quality of the curriculum available to students. Some work remains to be done developing courses for the Baccalaureate Core. However, in the next several years, much of our attention can shift to other components of the educational environment. Basically, students should come to feel that they are the university's most important clients.

Related 1987 Goals

- Develop curricula that are responsive to change.
- Strengthen the critical thinking and communication skills of students.
- Strengthen advising and support services for students.

Major Accomplishments Related to 1987 Goals

- Formation of a new general education program with emphasis on written communication, critical thinking, mathematics, fitness, laboratory science, western culture, cultural diversity, literature and the arts, social processes and institutions, global issues, and the interplay of science, technology, and society.
- Revision and review of all courses and degree requirements.
- Formulation and adoption of new principles and requirements distinguishing the Bachelor of Arts degrees from the Bachelor of Science degrees in order to improve the likelihood that students will receive the degree appropriate to their course of study.
- Revitalization of the Honors program.
- Establishment of the Student Organization Development Program to enhance student governance and leadership skills.
- Improvement of facilities for the Black, Hispanic, and Native American Cultural Centers, provision of funding for all-campus cultural programming, and creation of a Minority Affairs Task Force by the Student Government.
- Completion of planning and funding for the aquatics addition to the Dixon Recreation Center.
- Major expansion in the computational facilities for students.
- Creation of a "Wellness Hall," a "Quiet Hall," an "International House," a host hall for the Honors program, and a hall for upper-division students.
- Acquisition of the SCT/Banner Student Information System software to improve registration, advising, and general data base retrieval.

- Establishment of the Academic Services Center to assist, in particular, students without a firm commitment to a particular major.
- Development of university seminar courses to assist entering and transferring students.

Continuing Challenges

- Inadequate funding results in larger courses and fewer teachers, making it more difficult to foster a supportive environment that encourages critical thinking and communication skills for students.
- Students continue to report frustration with the quality of advising, and with bureaucratic and impersonal treatment by some faculty and some service providers.
- Faculty continue to report that efforts invested in academic advising are not rewarded.
- A regular process for reviewing graduate curricula exists but a formal process is lacking for those undergraduate programs that are not subject to special accreditation.

Objectives

- 2.1 Improve recognition and status for undergraduate teaching, academic advising, and student/faculty interactions.**
- 2.2 Enhance the quality of student life by improving students' experiences in living groups, orientation programs, peer relationships and interactions, and academic learning/assistance centers.**
- 2.3 Enhance the quality of instructional support services; streamline and personalize regulations and procedures.**
- 2.4 Provide child care to serve the children of students.**
- 2.5 Develop programs which encourage student awareness and understanding of cultural diversity through international experiences and through involvement and interaction of students with faculty, staff, and the wider university environment, particularly with students from other cultures.**
- 2.6 Provide better analysis and evaluation of outcomes for student achievement, advising and student/academic support services, and for the students' overall experiences with the university.**
- 2.7 Develop procedures for the periodic review of those undergraduate curricula that are not subject to special accreditation.**

SUSTAIN AND EXPAND RESEARCH EXCELLENCE AND ARTISTIC CREATIVITY

Oregon State University is the leading research university in Oregon and is among the top research universities in the nation. Research provides new knowledge that is essential for intellectual development and the improvement of our world. Through artistic creativity, the university challenges, enriches, and ensouls the lives of students and citizens alike. Thus, both research and artistic creativity provide the means by which the university generates and transmits understanding about who we are and the world in which we live; research and artistic creation are an integral part of the university and are inseparable from the companion missions of education and service.

Related 1987 Goals

- Strengthen the humanities, social sciences, and the arts.
- Sustain and expand research excellence and artistic creativity.
- Expand the frontiers of knowledge by strengthening interdisciplinary activities.

Major Accomplishments Related to 1987 Goals

- Increased levels of proposal writing and contract and grant funding.
- Substantial improvement in computer facilities suited to research activity.
- Addition of computer-assisted reference services in the library.
- Reduction in the average number of teaching preparations in the College of Liberal Arts.
- Development and implementation of new graduate programs in economics, in movement studies for the disabled, and in scientific and technical communication.
- Reorganization and reorientation in the College of Education permitting reduced teaching loads and an increased emphasis on quality graduate programs while improving the undergraduate education of people who anticipate careers in teaching.
- Major progress in the development of three new centers: the Center for Gene Research and Biotechnology, the Center for Advanced Materials Research, and the Center for the Humanities.
- Completion of the Electrical and Computer Engineering building and initiation of the Agricultural Sciences II building.
- Establishment of endowed chairs.
- Initiation of the Distinguished Professor program.
- Development and implementation of the program to award honorary doctorates.

Remaining Challenges

- Increasing enrollments in the College of Liberal Arts threaten efforts to enhance scholarly achievements by reducing the unusually high teaching loads in that college.
- Facilities and equipment for research are inadequate.
- Nurturing interdisciplinary and multi-disciplinary efforts is difficult in an organization designed around disciplines.

Objectives

- 3.1 Recruit and support faculty, staff, and students of high research or artistic capability.**
- 3.2 Improve research facilities and equipment.**
- 3.3 Encourage and strengthen interdisciplinary studies and interdisciplinary research among students and faculty.**
- 3.4 Facilitate increased scholarly and creative productivity of faculty in the humanities, the social sciences, the arts, and education.**
- 3.5 Promote, coordinate, and publicize research and artistic achievement.**

ATTRACT, DEVELOP, AND RETAIN FACULTY AND STAFF COMMITTED TO EXCELLENCE

Excellent faculty and staff are a key to success in fulfilling the university's mission. Recent budget allocations have made it difficult to pursue this previously adopted goal. The fundamental importance of this goal and the current difficulties posed by budgetary constraints require that realistic steps be found that can be taken toward this goal.

Related 1987 Goals

- Attract, develop, and retain faculty and staff committed to excellence.

Major Accomplishments Related to 1987 Goals

- Addition of nationally and internationally recognized scholars in a number of areas.
- Addition of an Education and Training Officer and expansion of professional development programs.
- Implementation of a program formally designating distinguished professors.
- Revision of Promotion and Tenure Guidelines.
- Publication of a thoroughly updated *Faculty Handbook*.
- Implementation of a streamlined process for making promotion and tenure decisions at the university level.

Continuing Challenges

- Salaries are low.
- Faculty and staff morale needs to be improved.
- In a number of fields, there is inadequate funding for the "start-up" expenses associated with attracting new faculty.
- Faculty perceive that the connection between teaching effectiveness and salary and other rewards is too weak.
- An expected decline in the supply of new Ph.Ds in some fields will intensify current recruiting and retention challenges.
- Efforts to provide competitive salaries for new assistant professors have reduced the usual differences in salary that are related to rank and years of service; the same efforts, to the extent that they exacerbate salary differences among academic fields, test morale and collegiality.

Objectives

- 4.1 Bring faculty salaries to competitive levels.
- 4.2 Bring university facilities and program support to a level commensurate with our role as a major teaching and research university.
- 4.3 Strengthen programs and rewards that nurture good teaching.
- 4.4 Assure a work environment for faculty and staff that fosters cooperation and mutual respect and that builds high morale.
- 4.5 Expand departmental and university programs that promote professional development of faculty and staff.
- 4.6 Establish university day-care services for faculty and staff.
- 4.7 Identify impediments to upward mobility within individual staff positions.
- 4.8 Improve OSU's faculty and staff recruiting procedures.

5

EXPAND EDUCATIONAL AND PROFESSIONAL OPPORTUNITIES FOR MEMBERS OF MINORITY, FEMALE, DISADVANTAGED, AND DISABLED POPULATIONS

This goal, previously adopted for the university, continues to be important both as a fundamental institutional commitment and also in terms of our ability to compete successfully for the students of tomorrow. Although the goal is important, achievement has been difficult. This makes it all the more appropriate as a focus for future effort.

Related 1987 Goals

- Expand educational and professional opportunities for members of minorities, women, disadvantaged, and disabled persons.

Major Accomplishments Related to 1987 Goals

- Creation of the Board of Visitors for Minority Affairs and the Minority Affairs Commission.
- Preparation of the Minority Action Plan.
- Establishment of the Family Employment Program.
- Achievement of an award-winning record of employing people with disabilities in classified staff positions.
- Expansion of the Educational Opportunities Program while maintaining a graduation rate for EOP students higher than the rate for the undergraduate student body as a whole.
- Development of Minority Scholars Program.
- Approval of the M.S. program in Movement Studies for the Disabled.
- Initiation of efforts by the President's Commission on the Status of Women to recruit women faculty, support graduate women, and study campus safety.
- Improvement in building access for handicapped people.
- Provision of an increased number of multi-cultural events.
- Continuation of an annual review of salary and wage rates to identify possible inequities.
- Allocation of funds to support development of child-care services.
- Provision of increased funding for EOP and Affirmative Action at a time of overall budget reductions.

Continuing Challenges

- Using national norms, women and minorities continue to be under-represented among the faculty of many units at a time when, again using national comparisons, salaries at OSU are not competitive and competition for minority scholars is intense.

- Although a start has been made, the prospect of providing full campus child-care facilities still appears far away.
- Off campus, the surrounding community lacks the cultural diversity that would assist in attracting minority students, staff, and faculty; on campus, OSU is not immune to the racism on college campuses that has received recent nationwide attention.

Objectives

- 5.1 Intensify efforts to recruit women and people of color to faculty positions in which they are under-represented.
- 5.2 Evaluate the current process for employing women and people of color in classified staff positions in order to increase the numbers of persons from under-represented groups. Where externally imposed personnel policies impede pursuit of this objective, take a leadership role in seeking policy changes.
- 5.3 Improve recruitment of graduate and undergraduate students from under-represented or disadvantaged groups.
- 5.4 Remove physical barriers for persons with disabilities and improve their representation in management and at senior levels.
- 5.5 Work to insure retention of students, staff, and faculty from under-represented groups.
- 5.6 Create and sustain an ambience on campus that is sensitive to the needs of persons from under-represented groups and support measures that would make the broader community more attractive to people of color.
- 5.7 Diversify the curriculum by expanding the availability of courses and instructional materials relevant to the culture and experiences of women and people of color.
- 5.8 Intensify efforts to assure equity in the pay received by women and people of color.

INCREASE ENROLLMENTS OF OUTSTANDING STUDENTS

Oregon State University seeks motivated students who are well prepared for a rigorous educational experience in the liberal arts, the sciences, and the professions. Recent limitations on enrollment and recent changes in patterns of enrollment among the colleges mean that decisions we make - or fail to make - may significantly change the nature of the student body.

Related 1987 Goals

- Improve student retention and increase the enrollment of outstanding students.
- Improve the quality of graduate education, develop new programs, and increase graduate enrollment.

Major Accomplishments Related to 1987 Goals

- Establishment of the Academic Services Center.
- Implementation of the Minority Scholars Program.
- Establishment of three new graduate programs and the elimination of dozens of degree and certificate programs that have outlived their usefulness.
- Revitalization of the Honors Program.
- Adoption of increased limits on the size of institutional loans and increases in merit-based aid.
- Design and completion of research on the way OSU is perceived by students who do and do not choose to enroll.
- Development of the Baccalaureate Core.

Continuing Challenges

- Housing for all students is tight and is particularly problematic for families.
- Graduate stipends are not competitive.
- Currently, there is no comprehensive enrollment management policy.
- The Honors Program survives on the largely volunteer efforts of a relatively small number of faculty.
- Funding for academic scholarships is inadequate.

Objectives

- 6.1 Improve the quality and rigor of academic programs.
- 6.2 Raise the standards for undergraduate admission.
- 6.3 Revise and strengthen the Honors Program and departmental and college academic programs designed to enrich the education available to outstanding students.
- 6.4 Identify our highest quality academic programs and more actively market them.
- 6.5 Develop additional resources for rewarding student merit through scholarships, awards, and research stipends.
- 6.6 Target recruitment, admission, and student services to attract outstanding applicants.
- 6.7 Enhance the quality of instructional support services.
- 6.8 Develop a policy on the appropriate makeup of the student body at OSU.

SUSTAIN, COORDINATE, AND SHARPEN THE UNIVERSITY'S INTERNATIONAL FOCUS

International perspectives are increasingly important in all of the university's traditional activities. These perspectives will be crucial in the lives that will be led tomorrow by today's students. Foreign students are a large and increasing proportion of our student body. The university's research activities have an important and growing international scope and international considerations increasingly interest the traditional beneficiaries of our service efforts.

Related 1987 Goals

- Broaden the university's international perspective and focus its activities.

Major Accomplishments Related to 1987 Goals

- Establishment of general education requirements in the areas of global issues and cultural diversity and the allocation of funds to assist in the development of courses in these areas during a period of overall budget reduction.
- Provision of funding for a mandatory orientation program for all new foreign students.
- Provision of increased funding for faculty by the Office of International Research and Development.
- Development and initiation of the Oregon State System of Higher Education program in Ecuador.
- Development and initiation of an exchange program with Kiev Polytechnic Institute in the U.S.S.R.
- Development of supplemental promotion and tenure guidelines for those involved with international programs.
- Provision of funding for a new foreign student advisor position.
- Development of procedures and protocol for enhancing the experiences of foreign visitors.
- Initiation of efforts to establish and maintain relationships with overseas alumni.
- Reorganization to place international programs under one vice president.

Continuing Challenges

- Future State System policy on foreign language proficiency is unclear; the current Baccalaureate Core requirements were established at a time when participants assumed that foreign language proficiency would be a system-wide requirement for entrance.
- In the curriculum, coverage of non-western cultures is spotty.
- Development of additional courses with an international perspective will be necessary to provide sufficient courses to meet the needs generated by the Baccalaureate Core.

Objectives

- 7.1 Strengthen the international dimensions of the university's curriculum.**
- 7.2 Expand the international perspective of the university's faculty.**
- 7.3 Increase students' global awareness and their interest in international educational experiences.**
- 7.4 Enhance university services that support international activities.**
- 7.5 Expand and strengthen the university's liaison with its international constituents.**
- 7.6 Provide leadership and support throughout the State to international programs and services related to higher education.**

IMPROVE FACILITIES AND EQUIPMENT

Over a period of decades, budgetary difficulties caused needed new construction to be postponed, the maintenance of facilities to be deferred, and the acquisition of basic instructional equipment to be delayed. The physical infrastructure needs serious attention; laboratory facilities need to be upgraded; and there are pressing needs for building construction and renovation. The problem was a long time in the making and the effort to ameliorate it must continue.

Related 1987 Goals

- Improve facilities and equipment to enhance institutional capabilities.

Major Accomplishments Related to 1987 Goals

- Completion of phase I of the classroom renovation project and funding of phase II during a period of overall budget reduction.
- Allocation of funds for roof repair, again during a period of program reduction and elimination.
- Provision of an increase in recurring funding for instructional equipment although such increases required that programs be reduced and eliminated.
- Establishment of a Physical Plant Users Committee and a survey of satisfaction with Physical Plant services.

Continuing Challenges

- Library facilities are inadequate.
- The facilities for the art, music, and theatre programs are unusually inadequate.
- Facilities planning, space allocation, and capital construction need to be more closely linked with clearer academic planning.
- Facilities and equipment for research are inadequate.
- The continued availability of quality education in a number of fields depends upon our continuing recent efforts to ameliorate inadequacies in instructional laboratory facilities and equipment.
- The university needs to keep pace with changing instructional technologies and increasing requirements for video projectors and other modern instructional equipment.

Objectives

- 8.1 In any new external fund raising for major capital construction projects, give top priority to library expansion; the next priority will be provision of suitable instructional facilities for the visual and performing arts, followed by construction of facilities for computer science.**
- 8.2 Upgrade instructional laboratory facilities and instructional equipment.**
- 8.3 Increase the current efforts to upgrade classroom facilities and equipment and increase the number of larger classrooms.**
- 8.4 Increase recurring and nonrecurring funding for facilities repair and remodelling.**
- 8.5 Improve research facilities, equipment, and maintenance of research equipment.**
- 8.6 Formulate a program to identify and facilitate the joint use of facilities and equipment and allocate space to promote the shared use of specialized equipment.**

EXPAND AND IMPROVE LIBRARY AND COMPUTING SERVICES

The quality of the university's instruction, research, and service activities depends upon the continued development of library and computing services. Expansion of traditional collections and services in the library needs to be supplemented by the introduction of new technologies to provide access to information stored in the library and information available through electronic means. Important steps have been taken in expanding computing services. But needs for such services continue to expand. Further progress in the provision of computing services must be combined with efforts at remediation and innovation in the area of library services if the university is to maintain its current role as a comprehensive research university.

Related 1987 Goals

- Improve the library to enhance the university's capabilities.
- Strengthen university computing.

Major Accomplishments Related to 1987 Goals

- Provision of increased funding for the library.
- Expansion of library hours.
- Implementation of a CD-ROM reference index system and an automated catalog system.
- Initiation of a systematic evaluation of existing library collections.
- Ground breaking for the new library at the Mark O. Hatfield Marine Science Center.
- Implementation of new standards of scholarship for library personnel.
- Substantial improvement in the availability of microcomputers to students.
- Initiation of a new student information system.
- Major enhancement of mainframe capabilities supporting instructional, academic, and administrative computing.
- Expansion in the use of, and services available on, the campus computer network, maintaining the university's position as a national leader in the academic application of this technology.
- Implementation of a structure for charging academic computer services which has simplified and expanded access to academic computing services.

Continuing Challenges

- Library collections continue to rank 16th among 16 comparator institutions and the library continues to have to eliminate journal subscriptions because of funding shortages.

- The number of computer terminals connected to the computer mainframes is inadequate for current levels of student and faculty use. This deficiency will become more important as the university moves to an automated student information system designed to put advising information on the desk of every advisor.

Objectives

- 9.1 **Qualify for membership in the Association of Research Libraries**
- 9.2 **Review the university's need for information support services and fund a major library facilities expansion accordingly.**
- 9.3 **Attain a level of computing services consistent with the research and instructional mission of the university.**
- 9.4 **Implement the Student Information System and the Financial Information System to improve the management of the university.**
- 9.5 **Continue to expand student access to computing facilities.**
- 9.6 **Identify print and non-print collection needs and begin to strengthen those areas of greatest deficiency.**
- 9.7 **Develop and implement a plan to coordinate decision making for the management of computing services.**
- 9.8 **For both library and computing services, expand networking access on campus and among state facilities with linkages to emerging national and international networks and keep pace with the development of new technologies.**
- 9.9 **Coordinate collection development, resource sharing, and automated access with other libraries, both within and outside the Oregon State System of Higher Education.**

IMPROVE THE UNIVERSITY'S RELATIONS WITH ITS MANY CONSTITUENCIES

Public perceptions of the university will constrain or facilitate what we are able to accomplish. Recognized in 1987 as an important goal, there have been significant efforts in this area as colleagues work to understand and then build upon public perceptions of Oregon State University. While much has been accomplished, parts of the effort have had to rely upon *ad hoc* arrangements. Over the next several years, the university will implement a more coordinated approach to managing its public relations.

Related 1987 Goals

- Emphasize cooperation with other institutions and agencies.
- Improve the university's public relations and development activities.

Major Accomplishments Related to 1987 Goals

- Continuation and refinement of the many activities of the Extension Service, including rapid application of expertise to public policy questions and explicit attention to educating decision makers about the contributions OSU is making.
- Reorganization and reinvigoration of Continuing Higher Education resulting in a lengthy list of services provided and associations established in the State and in the region.
- Initiation and completion of the research, analysis, and planning activities of the University Marketing Committee.
- Formation of a network of alumni promptly informed about important educational issues pending in the legislature.
- Improvement in the content and appearance of university publications.
- Development of award-winning films, publications, and other educational materials.
- Initiation of an external review of the university's public relations activities.
- Appointment of the Vice President for University Relations during a period of program reduction and elimination.
- Reorganization of the Office of Information.
- Separation of the Development Office from the OSU Foundation to more clearly focus the functions of fund raising and asset management.
- Implementation of a shift from a centralized to a coordinated, decentralized fund-raising structure.
- Achievement of an increase of nearly thirty percent in charitable contributions, making the 1988-89 fiscal year the best year ever for fund-raising by the Oregon State University Foundation.

- Completion of the study, analysis, and recommendations by the Capital Campaign Pre-Planning Committee.
- Appointment of college development officers and resulting program developments.
- Establishment of the Oregon State University Portland Center and its many services and activities.

Continuing Challenges

- There is a need to improve coordination of the activities of the college development personnel, the OSU Foundation, and the OSU Development Office.
- Studies continue to show that a significant proportion of Oregon's citizens - and her graduating seniors - report that they know little about OSU; for many others, Oregon State University's image is incomplete and indistinct.

Objectives

- 10.1 Create and maintain a clear OSU image to emphasize quality of students, instruction, research, and service.**
- 10.2 Motivate various constituencies to increase support for OSU.**
- 10.3 Improve the responsiveness of faculty, staff, and administrators to their clients.**
- 10.4 Maintain programs to evaluate the effectiveness of OSU in identifying and satisfying the needs of its constituencies.**
- 10.5 Work to maintain close and productive relationships with the citizens and leaders in the immediate area.**

FUTURE PLANNING AND PLANNING THE FUTURE

Strategic planning is not something that universities, or any other institutions, simply order from a supplier, unpack, and plug in. Rather, strategic planning evolves. It never reaches a finished state. Just as our plans must provide for flexibility and the capacity to adjust, so too our mechanisms for planning must be implemented incrementally with opportunities for us to assess and change procedures.

Two years ago, the University participated in a major effort to establish a strategic planning process, unit plans, and a university plan. That was a start. Now, another step is being taken. And that is simply a next step, not the final step in reaching some 'strategic planning' ideal; indeed, there can be no last step in a process designed to be adaptive.

From Objectives to Actions

Plan objectives need to be turned into planning actions. Responsibility for achieving the objectives in unit plans rests with the unit planning leaders identified elsewhere in this report. Responsibility for objectives in the university-level plan will be assigned to appropriate university administrators, usually a planning unit leader. Their responsibility will include incorporating the objective in their unit plans and the regular assessment of progress made in achieving the objective.

Frequently, planning actions necessary to achieve particular objectives are already in revised unit plans. In addition, most of the ten temporary advisory groups responsible for recommending draft objectives also identified planning actions appropriate for achieving objectives. A report containing these recommendations will go to planning unit leaders.

Implementation

The implementation procedures outlined in *Preparing for the Future* continue to make sense: progress reviewed periodically with thorough review and revision biennially. The provisions for periodic review were not completely implemented. There were two reasons: responsibility for seeing that the review occurred was ambiguous and a series of demands unanticipated in 1987 caused review of progress to slip to the "back burner." Most of the 437 planning actions in the 1987 plan have been completed or substantially completed. That so much of the 1987 plan was accomplished is testimony to the soundness of the plan and suggests the limited value of tight monitoring procedures in a multi-purpose organization with a decentralized and collegial management tradition. We can also learn from the experience: implementation procedures should be able to adapt to the unanticipated and responsibility for maintaining the process of plan review and monitoring should be clearly assigned.

Ad hoc arrangements such as the current approach to reviewing and revising the strategic plan have to be replaced if the commitment to strategic planning found in *Preparing for the Future* is to be maintained. In subsequent planning iterations, the Institutional Research and Planning Unit in the Office of Budgets and Planning will be responsible for structuring the planning process and for seeing that the process is carried out. In particular, those responsibilities will include:

- On an annual basis, obtaining assessments of progress toward university-level objectives from administrators assigned responsibility for the objectives. Reviews will consist of statements of the actions taken to achieve objectives and measures of progress. Over the last two years, we have learned of the need to maintain flexibility and so the annual reviews must also provide opportunities to modify or change the priority attached to objectives and to add significant new objectives. The reviews will be timed to support internal budgetary processes. These provisions pertain to the assessment of progress toward university-level objectives. Review of progress toward unit-level objectives will be conducted using schedules and means determined by planning unit leaders.
- For university-level objectives, Institutional Research and Planning will prepare a summary of the results of the annual review and that summary will be widely available.
- Working with administrators responsible for particular university-level objectives, Institutional Research and Planning will develop measures for assessing progress toward objectives and will be responsible for obtaining the measurements agreed upon.
- On a biennial basis, Institutional Research and Planning will propose to the President's Council a procedure for thoroughly reviewing and updating university-level and unit-level plans. That procedure will be based upon an assessment of the strengths and weaknesses of preceding efforts. The review and revision will be supervised by a group representative of the university community. In the process of review and revision, the role of Institutional Research and Planning will be to provide staff support.

Revised Plan

APPENDIX A REVISED PLANNING ASSUMPTIONS

Assumptions about the External Environment

Demographic and Societal Trends

- Oregon's population is expected to increase by less than two percent annually through the year 2000.
- The age structure of the U.S. population will shift over time. Through the year 1992, the greatest increases will occur in the 35-54 year old segment and the 18-21 year old segment will decrease.
- The number of Oregon high school graduates will decline through 1993-94.
- The composition of households and families is changing with family size decreasing and single-parent families increasing.
- Women, particularly married women, will continue to enter the work force at faster rates than any other population group.

Economic Trends

- Overall federal funding for higher education will continue to be static or decline due to the pressure to reduce the federal deficit, which will increase the competition for state revenues.
- International trade, finance, and the movement of people will increase in importance to both the U.S. and Oregon economies.
- The Pacific Rim, particularly Japan, will continue to be Oregon's leading trading partner.
- National and state employment in services and retail and wholesale trade will grow faster than manufacturing employment.
- Oregon's forest products sector will maintain market share, but employment will continue to decline because of increasingly efficient production.
- Oregon's agriculture and food processing sectors will grow at an annual growth rate of two to four percent.
- Tourism in Oregon will continue to grow.
- The entire University will be pressured to commit significant resources to economic development vis-à-vis other functions.
- Growth in Oregon personal income will parallel the national average.

Revised Plan

State and Federal Policies

- Declining Federal support for research, student financial aid, and extension in higher education will place a greater reliance on state and external funds.
- The Oregon State System of Higher Education will experience increased competition for state funds from basic education and community colleges.
- State support for research will emphasize near-term economic development as distinct from basic long-term research.
- The recent extent to which higher education has been politicized in Oregon will abate somewhat and the State will seek to work out means for financing higher education that lead to more predictability; however, state policies will continue to promote the periodic review of programs for possible reduction or elimination.

Changing Environment for Higher Education

- Oregon's eight state-governed universities and colleges will reduce current FTE enrollment.
- The Oregon State System of Higher Education will continue to support inter-institutional programs and activities.
- The Office of Educational Policy and Planning will play an increasingly important role in setting the agenda for higher education in Oregon.
- Development of corporate education and training institutions as an alternate source of some parts of higher education will continue.
- There will be growth in the use of telecommunications to deliver higher education, nationally, state-wide and regionally.

Technological and Scientific Trends

- There will be a continuing integration of computers, automation, and telecommunications in all aspects of modern life.
- There will be an increased demand for research in all areas of bio-technology, materials science, health science, natural resource and environmental sciences, and other interdisciplinary fields.
- The sophistication and the cost of acquisition and maintenance of research instrumentation will continue to rapidly increase.

Market for Graduates

- Communication, problem-solving, and management skills are in growing demand for all college graduates.
- The greatest expansion in the job market is expected for the service, information, health care and promotion, and high technology and biotechnology industries.
- There is an impending nationwide shortage of Ph.D.s available to fill faculty positions and the shortages are expected to be most severe in the social sciences and the humanities.

- There will be increasing opportunities for graduates with training in foreign languages and in international studies.

Market for Research

- There will be an increasing opportunity for university research to help shape public policy in areas of economic development, natural resource management, health care, issues involving children, drugs, and concerns of an aging population.
- Opportunities for collaborative research between universities and industry will continue to expand.
- There will be an increasing demand for technology transfer.
- There will be increasing participation in international research, training, and development programs.
- There will be declining resources available for defense research.

Market for Continuing Higher Education and Extension

- There will be an increasing demand for life-long education from educated, older citizens.
- There is an increasing need for professional education and career-change retraining.
- New roles for Extension beyond service to agriculture, forestry, and home economics are evolving.
- There is a trend toward diversification of education delivery systems.
- There will be increased demands from citizens, and their elected representatives, to make degree programs available during evenings and on weekends at locations convenient for "non-traditional" students working full-time.
- Oregon State University will continue to contribute to the efforts of the Oregon State System of Higher Education to meet the needs for public higher education in the Portland metropolitan area.

Assumptions about the Internal Environment

General Assumptions

- Oregon State University will continue to pursue its mission as a comprehensive research university.
- In those areas where OSU is strongest, it will continue to compete with the best institutions in the country.
- To make Oregon State a truly comprehensive university, the asymmetry among its programs will be addressed.

Revised Plan

- Periodic internal and external review of all University programs will continue to be conducted with the purpose of maintaining and enhancing the overall quality of programs.

Faculty and Staff

- The selection, recruitment, evaluation, and compensation of faculty will be a high priority of the University.
- Institute directorships and extramurally funded professorships will be used to attract outstanding senior faculty members to OSU.
- Recruitment and retention of minority and female faculty members will continue to be emphasized.
- The bulk of support for research by faculty will continue to come from extramural grants, fellowships, and contracts.
- Management service and classified staff constitute an indispensable resource for the University; OSU will seek to enhance their career development.

Numbers and Sources of Students

- More effective recruitment programs will be developed to continue attracting the best prepared of college-age Oregon residents. Special efforts will be made to recruit minority students. We will continue to welcome older than average students.
- Comprehensive enrollment management strategies will be developed to include recruitment activities, enrollment targets, admission requirements, financial aid, competitive tuition rates, and student employment opportunities.
- As a research university, OSU will share recruitment responsibility for graduate students with the departments and will seek ways to enlarge the proportion of the student body seeking advanced degrees.

Educational Programs

- The national trend toward increased enrollment in the liberal arts will continue to be felt at OSU.
- Significant new initiatives will require discontinuance or curtailment of marginal programs or consolidation of overlapping programs.
- Barriers to interdisciplinary programs and inter-institutional ventures will be reduced to assure the future vitality of the University.
- OSU will explore and develop inter-institutional and additional interdisciplinary graduate programs and masters degree programs in the liberal arts.
- OSU will increase its interaction with community colleges.
- Resources will be invested in development of courses for the Baccalaureate Core and resources will be shifted among units to accommodate enrollment shifts produced by the implementation of the Core.
- Instructional productivity will be taken into account in budget allocations.

Instruction

- Student retention will be increased through improved systems for evaluating, recognizing, and rewarding excellent teaching and advising and through the introduction of modern registration, scheduling, and advising aids.
- Release time from teaching and additional resources will be provided to encourage innovation in instruction and professional development.
- OSU will increase student access to its educational programs through flexible scheduling and use of alternative locations.

Research

- In seeking public and private sources of funding, the University will capitalize on strengths reflecting its mission, location, and historical development.
- OSU will continue to be highly competitive for external research support.
- Creativity and scholarship in the arts, humanities, and social sciences is essential for a comprehensive research university and will be rewarded.
- Existing space allocation formulas will be refined to include additional qualitative criteria reflecting programmatic needs and research productivity.
- Research productivity will be taken into account in budget allocations.

Financing

- The University will establish a more active relationship with public and private sector organizations to attract funding for quality programs in teaching, research, and service.
- To maintain quality in a period of limited resources the University will consolidate programs and curtail ineffective ones.
- An expected increase in faculty with intermittent research support requires a program for sustained funding of graduate student training.

Equipment and Facilities

- Building renovation will continue to provide a more cost-effective means than new construction for providing adequate space for the University's instructional, research, and service functions.

Revised Plan

APPENDIX B CONTRIBUTORS

Accreditation Steering Committee

Lyle Calvin	Stephanie Sanford
John Davis	Dick Scanlan
D.S. "Pete" Fullerton	Jo Anne Trow
Melvin George	Jack Van de Water
Kathleen Heath	Rod Frakes, Former Member
John Koch	Dan Read, Former Member
Allan Mathany	Carol Kominski, Staff Liaison
	Bruce Shepard, Chair

Planning Unit Leaders

College of Liberal Arts	Bill Wilkins
College of Science	Fred Horne
College of Agricultural Sciences	Roy Arnold
College of Business	Lynn Spruill
College of Education	Robert Barr
College of Engineering	Fred Burgess
College of Forestry	Carl Stoltenberg
College of Health and Human Performance	Michael Maksud
College of Home Economics	Kinsey B. Green
College of Oceanography	Douglas Caldwell
College of Pharmacy	Richard Ohvall
College of Veterinary Medicine	Loren Koller
Graduate School	Tom Maresch
Research	Dick Scanlan
Extension Service	O. E. Smith
International Education, Research, Development	George Keller
Library	Melvin George
Academic Affairs	D.S. Fullerton
Student Affairs	Jo Anne Trow
Intercollegiate Athletics	Lynn Snyder
Finance and Administration	Ed Coate
Faculty Senate	Gary Tiedeman

Revised Plan

ADVISORY GROUPS

GOAL 1: Serve people through instruction, research, and extension.

Kathleen Heath, Chair

Sue Anderson

Lee Schroeder

Harold Kerr

Lois Goering

Bob Schwartz

Donna Gregerson

Dale McFarlane

GOAL 2: Maintain a high quality and nurturing educational environment that aids students in achieving their fullest potential.

Jo Anne Trow, Chair

Bill Smart

Roger Penn

Robin Derringer

Roger Fendall

Tudy Seistrup

Darcy Arriola

Larry Griggs

Clara Horne

GOAL 3: Sustain and expand research excellence and artistic creativity.

Dick Scanlan, Chair

Bob Frank

John Dunn

Thayne Dutson

Carroll DeKock

JoAnn Leong

GOAL 4: Attract, develop, and retain faculty and staff committed to excellence.

D. S. "Pete" Fullerton, Chair

Stephanie Sanford

Bill Lunch

Tom Zinn

Bill Adams

Bud Weiser

Carol Soleau

Karel Murphy

GOAL 5: Expand educational and professional opportunities for members of minority, female, disadvantaged, and disabled populations.

Stephanie Sanford, Chair

Cindy Arbuckle

Harrison Branch

Fred Horne

Mary Alice Seville

Narcie Rodriguez-Smith

GOAL 6: Increase enrollments of outstanding students.

Lyle Calvin, Chair

Ron Wrolstad

Boris Becker

Ann Rossignol

Kay Conrad

GOAL 7: Sustain, coordinate, and sharpen the university's international focus.

Laura Rice-Sayre and Jack Van de Water, Co-Chairs

Sally Malueg

Stacy Walton

Michael Moffett

Gordon Matzke

Bill Krueger

Karim Hamdy

GOAL 8: Improve facilities and equipment.

John Koch, Chair

Ken Waddel

Ken Krane

John Fryer

Kelly Munger

GOAL 9: Expand and improve library and computing services.

Mel George, Chair		
John Skelton	Cliff Dalton	Terry Wood
Jon Root		

GOAL 10: Improve the university's relations with its many constituencies.

Carol Kominski, Chair		
Ken Kingsley	Dan Brown	Lynn Snyder
Don Wirth		

**Consultants on 1987 Plan,
Accomplishments, and Continuing Challenges**

Arnold P. Appleby	Melvin R. George	Walter G. Rudd
Roy G. Arnold	Kinsey B. Green	Stephanie Sanford
David A. Bella	Brian Gould	Richard A. Scanlan
John H. Block	Roberta Hall	Robert Schwartz
Stefan Bloomfield	David P. Hardesty	Dale Simmons
Tharald Borgir	Clara Horne	John Skelton
Bill Browne	George Keller	O. E. Smith
M. Edward Bryan	Stephen Lawton	Carol Soleau
John Byrne	Phyllis Lee	Graham Spanier
Kay Conrad	Mike Martin	George Stevens
Edwin Coate	Tom Maresh	Carl Stoltenberg
Carroll W. Dekock	Christopher Mathews	R. W. Thies
Thurston Doler	Tom McClintock	Jo Anne Trow
Shirley Dudzik	Ron Miller	Conrad "Bud" Weiser
Daniel Dunham	Robert Morris	Bill Wilkins
John Dunn	Kathleen Mulligan	LaVerne Woods
Gwil Evans	J. Roger Penn	Joe Wooten
John Evey	Mary E. Perkins	Shahid Yusaf
Bob Frank	Jean Peters	Donald B. Zobel
D.S. Fullerton	Jon Root	

Staff Support

Carol Kominski
Jacquelyn Frost
Gary Beach
Nan McNatt

Revised Plan