



To: Administrative Staff and U-Plan Council
From: Chancellor Richard Wells
Date: January 18, 2005

Re: **Development of Seven Key Operational Plans**

Cc: January 18, 2005 Retreat Participants

The alignment of our Governing Ideas, strategic action initiatives and key operational plans constitutes one persistent challenge to continued success in our pursuit of distinctiveness.

I have listed below a “working definition” for seven key operational plans in which the purpose, importance and leadership responsibility for each plan is briefly described.

The Provost and Vice Chancellors are being charged to provide me with the first draft of these key operational plans by April 15, 2005. These initial draft plans should be developed primarily but not exclusively within the responsible University Division(s) using inclusive, interactive and transparent processes. These draft plans will be analyzed and ideas for improvement will be advanced during the summer of 2005. A second draft will be filed on or before September 1, 2005. These drafts will then be discussed during U-PLAN and Administrative Staff meetings as well as in open campus wide forums. The feedback obtained will be used to revise these key operational plans. All future annual reports will include operational plan updates and all operational plans will be modified as necessary.

Please review the working definitions for each plan, and we will discuss them during our next meeting.

Academic Program and Student Outcomes Assessment Plan

The **purpose** of this key operational plan is to:

- 1) Provide an overview of the academic structure and “menu” of undergraduate and graduate majors, minors and certificate programs as well as out-of-class experiences;
- 2) Integrate the **Diversity Plan 2008** to the Academic Program and Student Outcome Assessment Plan;
- 3) Link existing, emerging and new baccalaureate degree completion agreements with the UW Colleges and Wisconsin Technical Colleges;
- 4) Identify academic planning needs, assumptions and new academic programming priorities over the next five years;
- 5) Fully incorporate a system of student outcomes assessment into each undergraduate and graduate major as well as the general education program; and
- 6) Identify academic planning, policy and student outcome assessment issues with recommended action steps to address the issues and challenges.

This key operational plan should be guided by the philosophy of integration of academic, residential and co- and extra-curricular programming wherein the out-of-class experience reinforces the holistic

educational experience of all students, undergraduate as well as graduate. Furthermore, the plan should promote a culture in which academic and educational programs use student outcomes assessment data, future workforce development needs, alumni satisfaction surveys and the needs of liberally educated citizens to enhance the quality of all academic and educational programs. Finally, the plan should allow individual students to more effectively realize their individual objectives by increasing their:

- a) Subject matter mastery
- b) Cognition skills;
- c) Motivation to learn in an immediate educational environment and as a lifelong objective; and
- d) Mastering of behaviors and skills required to succeed in their personal, career and community environments.

The **Academic Affairs Division**, working closely with the Student Affairs Division, is the unit responsible for providing the leadership to develop and refine this key operational plan using inclusive, iterative and transparent campus-wide processes.

Human Resource Support and Development Plan

The **purpose** of this key operational plan is to:

- 1) Provide an overview of human resources support and development services;
- 2) Link and integrate the **Affirmative Action Plan** and the **Diversity Plan 2008** to the Human Resource Support and Development Plan;
- 3) Outline human resource support and development planning assumptions over the next five years; and
- 4) Describe human resource support and development planning and policy issues with recommended action steps to address the issues and challenges.

As the largest and most important asset on our campus, the faculty, academic staff, classified staff and administrators are the single most powerful force for fulfilling our vision and accomplishing our mission. This plan must be fully integrated with the **Affirmative Action Plan** and the **Diversity Plan 2008**. Providing a human resource support and development plan that promotes the increased professionalization, refinement and support of our human talents will make the difference between an institution that thrives in the future and one that stagnates in outdated past practices.

The **Administrative Services Division** (i.e. Human Resource Office), working closely with the Office of the Provost, is the unit responsible for providing the leadership to develop and refine this key operational plan using inclusive, iterative and transparent campus-wide processes.

Enrollment Management and Student Support Plan

The **purpose** of this key operational plan is to:

- 1) Identify the desired size of the student body and define the types and mix of students we should serve;
- 2) Establish recruitment, retention, degree progression and graduation goals;
- 3) Link all enrollment goals and the student support services with the **Diversity Plan 2008** and the Oshkosh Student Compact;
- 4) Identify enrollment management planning assumptions over the next five years; and
- 5) Describe enrollment management and student support planning and policy issues with recommended action steps to address issues and challenges.

Improvement of our enrollment base through modest increases in the size and academic readiness of the student body, while significantly changing the mix and ethnic and racial diversity of our students, requires a university-wide effort which integrates the goals and responsibilities of the overall institution with those at the program level. Furthermore, the development and refinement of this plan must be guided by the:

- a) Diversity Plan 2008;
- b) Changing and increasingly competitive student marketplace;
- c) Existing, emerging and new baccalaureate degree completion agreements with the UW Colleges and Wisconsin Technical Colleges,
 - a. Financial aid leveraging; and
 - b. Use of massive amounts of data to develop, guide and assess our plan.

The **Academic Affairs Division** and the **Student Affairs Division** are the units responsible for providing the leadership to develop and refine this key operational plan using inclusive, iterative and transparent campus-wide processes.

Finance and Budgeting Plan

The **purpose** of this key operational plan is to:

- 1) Provide an understanding of the financial structure of the University for internal and external constituents;
- 2) Outline financial planning assumptions of the University over the next five years; and
- 3) Identify financial planning and policy issues with recommended action steps for addressing these issues.

The financial plan will be revised and delivered after each legislative biennial budget session. The financial plan, along with appropriate financial indicators, should be used to monitor the financial health of the University. These tools provide a benchmark with our peer institutions to assess positive financial strengths and remaining financial challenges.

The **Administrative Services Division** is responsible for providing the leadership to develop and refine this plan using inclusive, iterative and transparent campus-wide processes.

Facilities Master Plan

The **purpose** of this key operational plan is to:

- 1) Provide an overview and analysis of the quality and quantity of all university facilities in terms of how well the facilities support the mission and vision for the university community;
- 2) Outline facilities planning assumptions for the University over the next five years;
- 3) Identify facilities planning and policy issues with recommended steps to address the issues and challenges.

The Facilities Master Plan should be comprehensive in nature to include such “sub plans” as landscaping, way finding, parking, residential facilities needs, built-in technological and instrumentation needs, etc. It should also be guided by such goals as:

- a) Facilitating and enhancing the scholarship of teaching, research, intellectual and creative work and public service;
- b) Enhancing the internal and external aesthetics and ambiance; and
- c) Strengthening the quality of campus life and the sense of being part of an academic community.

The **Administrative Services Division** is the unit responsible for providing the leadership to develop and refine this key operational plan using inclusive, iterative and transparent campus-wide processes.

Information Technology Plan

The **purpose** of this key operational plan is to:

- 1) Conduct a comprehensive assessment of all information technology resources and services;
- 2) Link and integrate all other key operational plans to the Information Technology Plan;
- 3) Outline technology planning assumptions over the next five years; and
- 4) Identify technology planning and policy issues with recommended action items to address the issues and challenges.

Information technology is a core infrastructure requirement of all universities and must be provided to all units and members of the university community regardless of physical location or time constraints. Therefore, the Information Technology Plan must be developed to support all aspects of our mission and the related systems and services. It should be developed so as to integrate state of the art technology into how we teach, serve and conduct our research. Those universities that utilize information technology to transform processes, services and how we work are most likely to thrive in the future.

The **Academic Affairs Division**, in close consultation with all other university divisions, is responsible for providing the leadership to develop and refine this plan using inclusive, iterative and transparent campus-wide processes.

Advancement and Relationship Development Plan

The **purpose** of this key operational plan is to:

- 1) Provide an overview of existing private funding raising, extramural funding, marketing, governmental relations, community relationships and alumni relations structure and programs;
- 2) Outline the advancement and relationships development planning assumptions over the next five years; and
- 3) Identify the advancement and relationship development planning and policy issues with recommended action steps to address issues and challenges.

Protecting, strengthening and diversifying our resource and relationships base are crucial for fulfilling our mission and accomplishing our vision. The development, implementation and refinement of an advancement plan characterized by strong relationships development programs for local, state and federal decision makers, alumni donors, business, educational and community leaders and the broader public is key to maintaining, expanding and diversifying our resources and relationships with key external leaders and constituencies.

The **Office of the Chancellor** and the **Advancement Division**, working closely with units within Academic Affairs (i.e. Office of Grants) and Administrative Affairs (i.e. Office of Vice Chancellor), are responsible for providing the leadership to develop, implement and refine this key operational plan using inclusive, iterative and transparent campus-wide processes.

All of the above operational plans should be aligned with our Governing Ideas and strategic action initiatives.