



# **Success and New Context**

## **January 11, 2011**

# Oakland University

## Success and New Context

### Success

- What Our Peers Are Saying About Us – Our Strengths
- Sample Higher Education Budget Cuts/Difficulty
- OU Has Been Successful in the Great Recession – Why?

### New Context

- Trends Impacting OU's Future Requiring Focus
  - Higher Education Megatrends
  - Curricular Trends
  - Michigan Economic/Job Trends
  - Political Trends
  - Fundraising Trends
  - Demographic Trends
  - Competitor Trends

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## Success and New Context

### **Our Response In New Context**

- Current Strategic Planning Initiative – An Invitation
- Competitive Advantage
- Resourcing the University and Specific Recommended Action Agenda for Quality
- Expand Community Interactions and Partnerships for Quality and Resources
- Operations
- OU Brand

### **Summary**

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## Success and New Context

### What Others Are Saying About Us: College of Arts and Sciences

- “The Committee described your undergraduate chemistry program as solid and very traditional. The Committee complimented the diversity of your faculty and the very good research opportunities available to undergraduates. The development of student skills appears to be thoughtfully designed as a process throughout the undergraduate curriculum.”  
– *American Chemical Society’s Committee on Professional Training on the Department of Chemistry, February 2010*
- “Strengths of the OU Bachelor of Social Work Program:
  - the University’s administrative support and commitment to the program,
  - support staff and technological resources,
  - quality of the library collection and support of the library staff,
  - faculty to student ratio that permits collaboration and facilitates professional development,
  - and the program’s approach to teaching values and ethical decision-making.”  
– *Bachelor in Social Work Accreditation Review, Fall 2010*



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### **What Others Are Saying About Us: School of Business Administration**

- “The college has an enthusiastic and collegial faculty who appear to be committed to providing a high quality educational experience for students.”  
– AACSB Peer Review Team (PRT) Report on the School of Business
- “The college has developed strong partnerships with the business community as evidenced by the support that the advisory boards for the School are providing and the success that the School has recently had in receiving large challenge donations from two alumni for the new Center for Integrated Business Research and Education.”  
– AACSB Peer Review Team (PRT) Report on the School of Business
- “Relationships between students and faculty are unusually strong. Students feel that the faculty cares about them as people and are committed to their learning and development.”  
– AACSB Peer Review Team (PRT) Report on the School of Business,  
Department of Accounting Accreditation Report

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### **What Others Are Saying About Us: School of Education and Human Services**

- “Extensive field experiences, faculty who are scholars with K-12 teaching experience, state-of-the-art facilities, curriculum requirements that exceed state standards, and close monitoring of students’ progress throughout the program.”  
– *Teacher Education Accreditation Council Audit Report, June 2007*
- “Field placement teachers rated over 90% of elementary and secondary students as proficient in the overall categories of personal attributes, relationships with others, attendance and teaching skills.”  
– *Teacher Education Accreditation Council Audit Report, June 2007*
- “Oakland University is committed to the teacher education program.”  
– *Teacher Education Accreditation Council Audit Report, June 2007*

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### **What Others Are Saying About Us: School of Engineering and Computer Science**

- “The faculty members are well qualified and exhibit a very positive attitude and high level of morale.”  
– *Accreditation Board for Engineering and Technology (ABET) on the Department of Electrical Engineering, January 2009*
- “The School of Engineering and Computer Science has a strong positive working relationship with the many automotive and automotive related industries in the Detroit area.”  
– *Accreditation Board for Engineering and Technology (ABET), January 2009*
- “A positive culture of good working relationships between faculty members and students both in and outside the classroom was observed. This observation was acknowledged by students, alumni and industrial partners.”  
– *Accreditation Board for Engineering and Technology (ABET) on the Department of Mechanical Engineering, January 2009*

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### What Others Are Saying About Us: School of Health Sciences

- “The Physical Therapy program is meeting its mission as evidenced by student outcomes and high performance ratings provided by graduates, clinical instructors and employers.”
  - *Report on the School of Commission on Physical Therapy Education study report and an on-site visit of Department of Physical Therapy, 2010*
- The past two years Department of Physical Therapy graduates have had a 100% passing rate on the national board exam and a 100% employment rate.

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### What Others Are Saying About Us: OUWB School of Medicine

- “The medical school has assembled a talented, energetic, and experienced leadership team.”  
– *Liaison Committee on Medical Education’s (LCME) Six Areas of Strength*
- “Oakland University has provided attractive and functional quarters for the medical school that are located in the center of the Oakland campus, with ample facilities for medical education and student life.”  
– *Liaison Committee on Medical Education’s (LCME) Six Areas of Strength*
- “The Beaumont Hospital system provides notable access to a wide variety and large volume of patients, as well as a strong and enduring dedication to education, research, and community service that stretches back 50 years. This commitment to social responsibility complements the medical school’s vision and curriculum.”  
– *Liaison Committee on Medical Education’s (LCME) Six Areas of Strength*

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### What Others Are Saying About Us: School of Nursing

- “Faculty appear to be collegial ... with a futuristic orientation.”  
– *2006 Higher Education Commission’s evaluation of the RN/BSN program, the first fully online program at OU*
- “The baccalaureate and master’s degree programs in nursing continue to meet all accreditation standards.”  
– *2007 Commission on Collegiate Nursing Education (CCNE) midterm report*

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### **What Others Are Saying About Us: Statements from the Team Report of the Higher Learning Commission (NCA), April 2009**

- “The University supports the creative and scholarly endeavors of the faculty through a variety of programs and publically recognizes excellence.”
- “Clearly, decisions bearing on the development of the organization and budget allocations are mission driven.”
- “Faculty leaders and administrators understand their responsibilities within the governance and administrative structure and share authority and responsibility to achieve the mission of the university.”
- “Academic and non-academic units all appear to use strong planning processes through which they decide how to allocate available resources.”
- “Oakland University provides a rich environment of curricular, co-curricular and extracurricular activities.”
- “Service to its communities is a key part of OU’s mission and opportunities for service are integrated into programs across campus.”

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### Selected Higher Education Budget Cuts

The Boston Globe  
HOME / NEWS / EDUCATION

#### Faculty cuts at Brandeis proposed

Downturn cited; plan would end some programs

By Tracy Jan  
Globe Staff / February 23, 2010

ver.com

ire campus? UNC worst-cuts

#### University of Tennessee Staff Cuts

By Heather Myers

PUBLISHED / MODIFIED / POSTED: 7:03 am EST November 25, 2010

#### denverpost.com

#### Colorado looks at overlapping programs at colleges, universities

By Allison Sherry  
The Denver Post

POSTED: 02/23/2010 01:00:00 AM MST  
UPDATED: 02/23/2010 12:29:28 PM MST



Univ. of Toledo announces layoffs of 3 d

The New York Times

#### Yale, With \$150 Million Deficit, Plans Staff and Research Cuts

By LISA W. FODERARO  
Published: February 3, 2010

#### BANGOR DAILY NEWS

BUDGET  
University plans layoffs to cover \$5.9M gap

By Jessica Bloch  
BON Staff

#### post-gazette.com

The New York Times  
Pittsburgh Post-Gazette  
Education

#### IUP warns of faculty layoffs

Friday, July 23, 2010

By Eleanor Chute, Pittsburgh Post-Gazette

Budget-Cutting Colleges Bid Some Languages Adieu

The Providence Journal  
projo.com

#### Tuition hike, job cuts at E

01:00 AM EST on Sunday, February 28, 2010



Albion College plans to eliminate equivalent full-time faculty positions in anticipation of student enrollment

Published: Thursday, February 25, 2010, 3:38 PM Updated: Friday, February 26, 2010, 1:00 PM

#### The State News.com

About 590 jobs on line in MSU budget

By Kayla Habermehl



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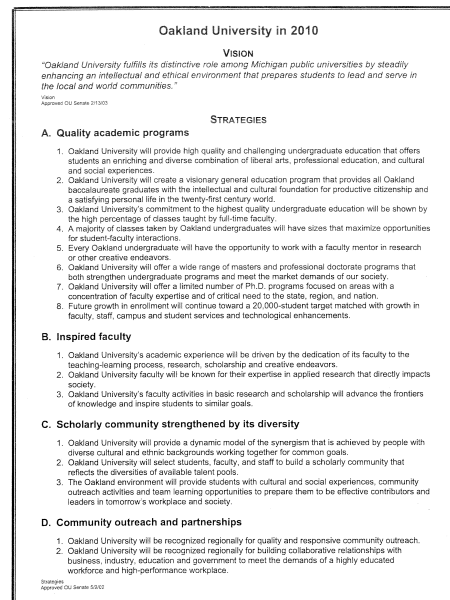
### **Success: Against the Odds**

- Against economic odds the past ten years, the university has strengthened at a steady pace in all facets of its operations.
- Reputation enhanced and secure in the region.
- On path to national university recognition through planning and execution.
- A tribute to faculty and staff commitment and dedication.
- A salute to university supporters, alumni, students, and community and government leaders.

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### Strategic Planning History

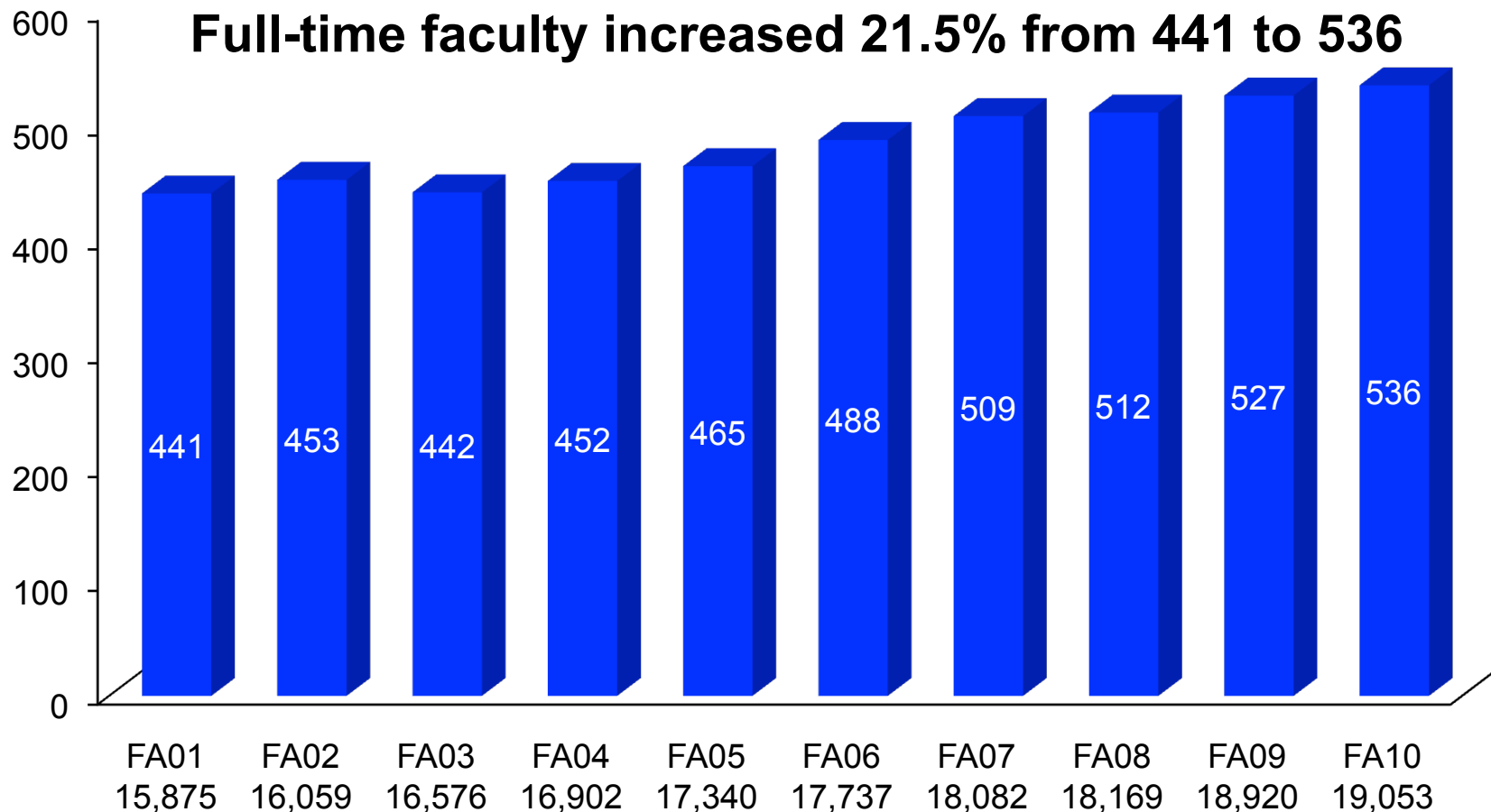


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### Faculty Strength Versus Student Enrollment, 2001-2010

**Enrollment increased 20%, from 15,875 to 19,053**  
**Full-time faculty increased 21.5% from 441 to 536**



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### Instructional Programs

#### Undergraduate

134 Majors  
78 Minors  
22 Concentrations

#### Graduate

18 Doctoral Programs  
52 Master's Programs  
1 Ed Specialist Degree  
48 Certificate Programs

### Other Academic Programs

**Continuing Education and Professional  
Development**

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### New Degree Programs

Doctor of Medicine

MS Mechatronics

MA Communications

MSN Clinical Nurse Leadership

BS Actuarial Science

BA Liberal Studies

Executive MBA

tDPT Transitional Physical Therapy

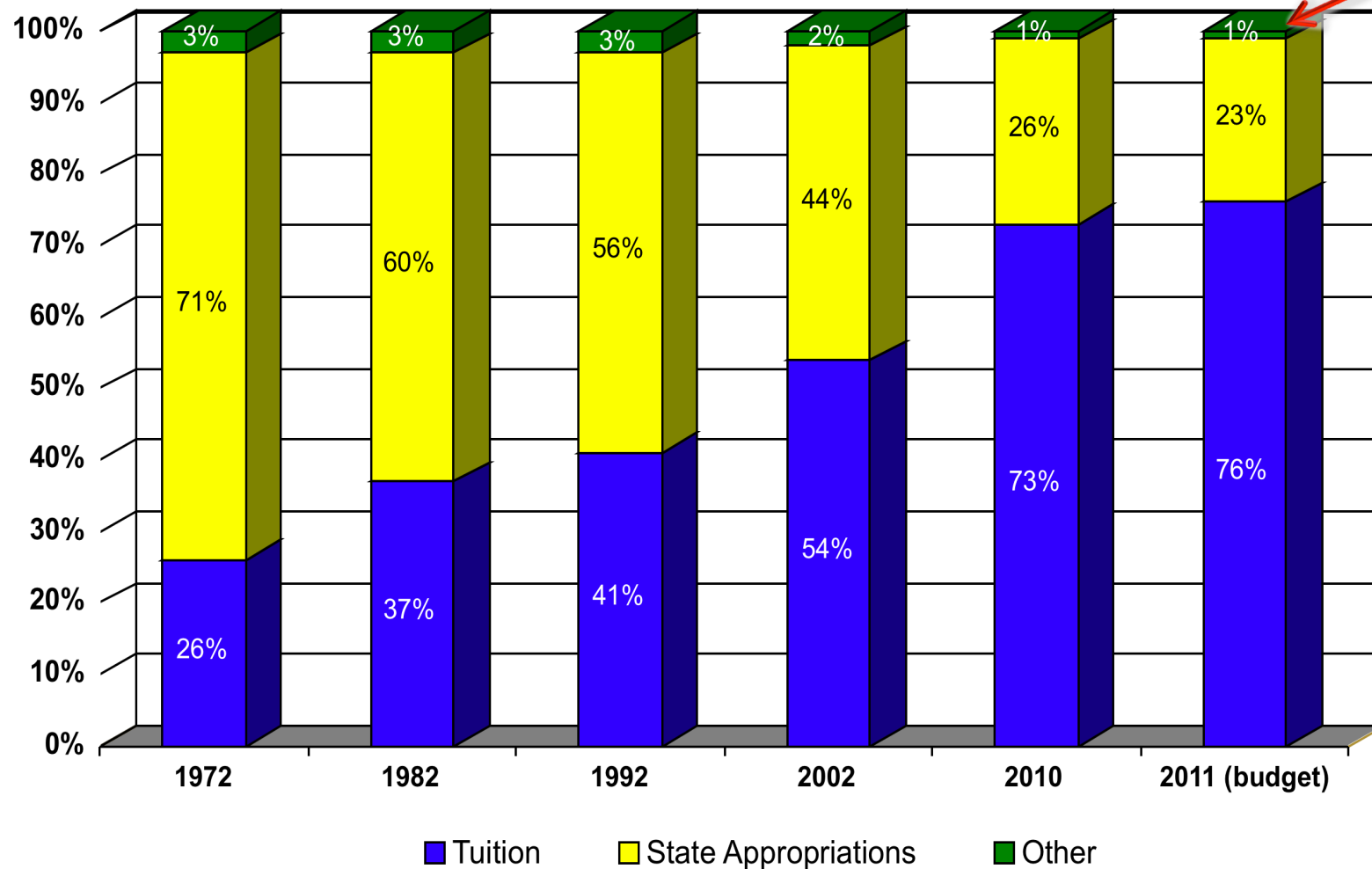
BA in Cinema Studies



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## Success and New Context

### OU Funding Model – 1%

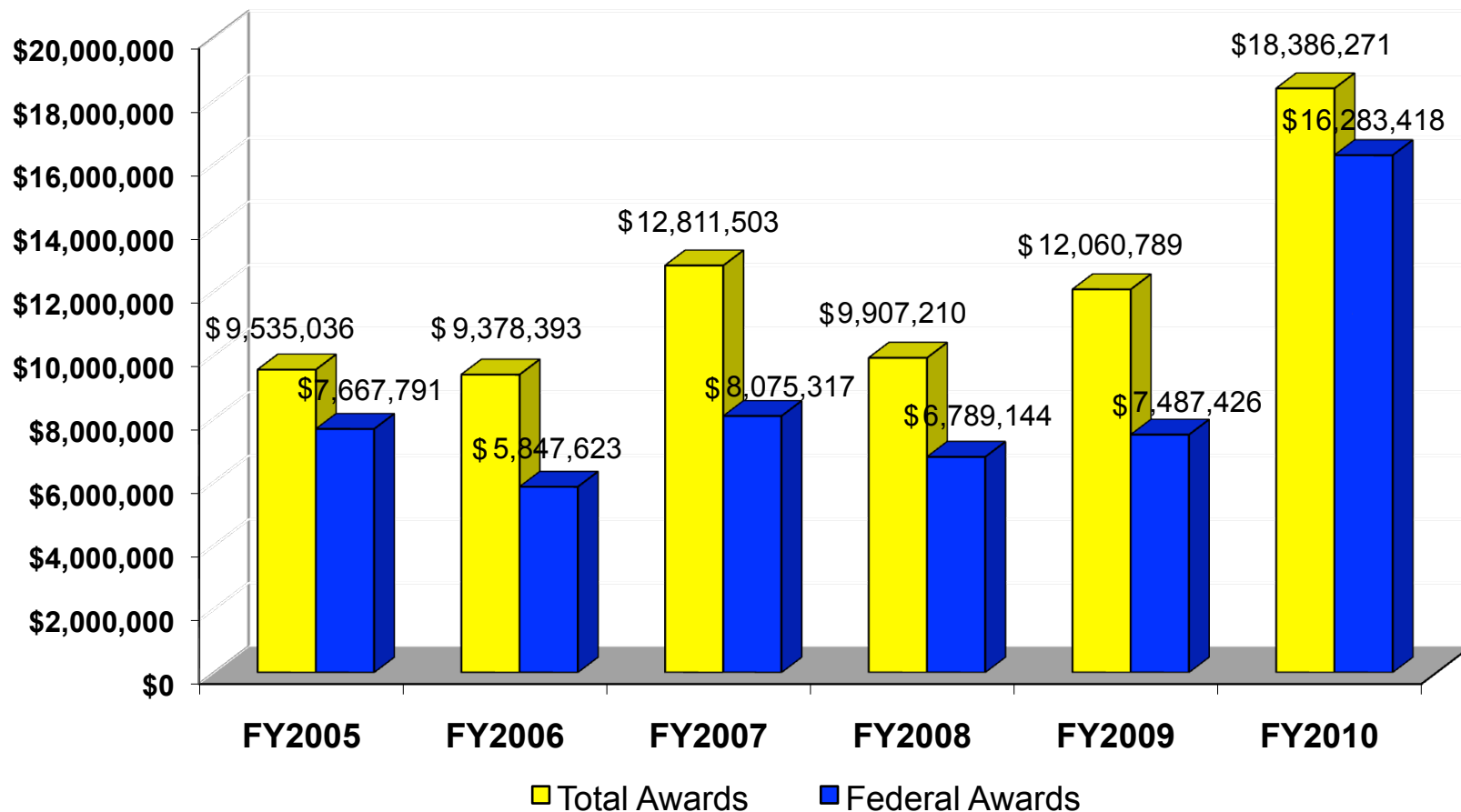


*Comparison of general fund revenue sources FY1972 to FY2011*

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### OU Funding Model – 1% Grant and Contract Activity: FY05 - FY10



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## Success and New Context

### OU Funding Model – 1% Grant and Contract Activity: Gross ICR Revenue

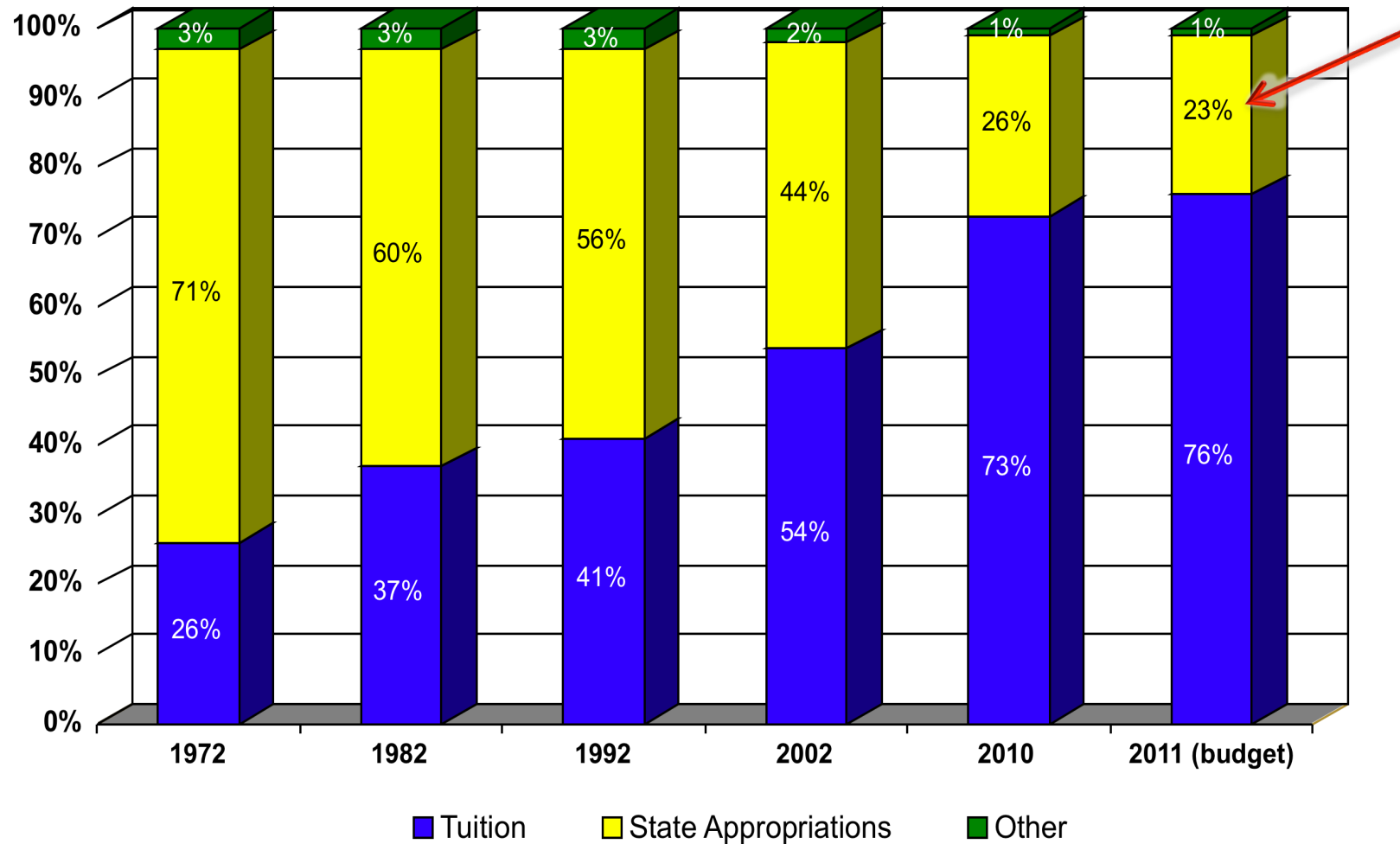
<u>Year</u>	<u>Amount</u>
FY05	\$1,741,972
FY06	\$1,714,226
FY07	\$1,713,173
FY08	\$1,659,673
FY09	\$1,892,593
FY10	\$2,219,017
FY11 (forecast)	\$1,800,000



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## Success and New Context

### OU Funding Model – 23%



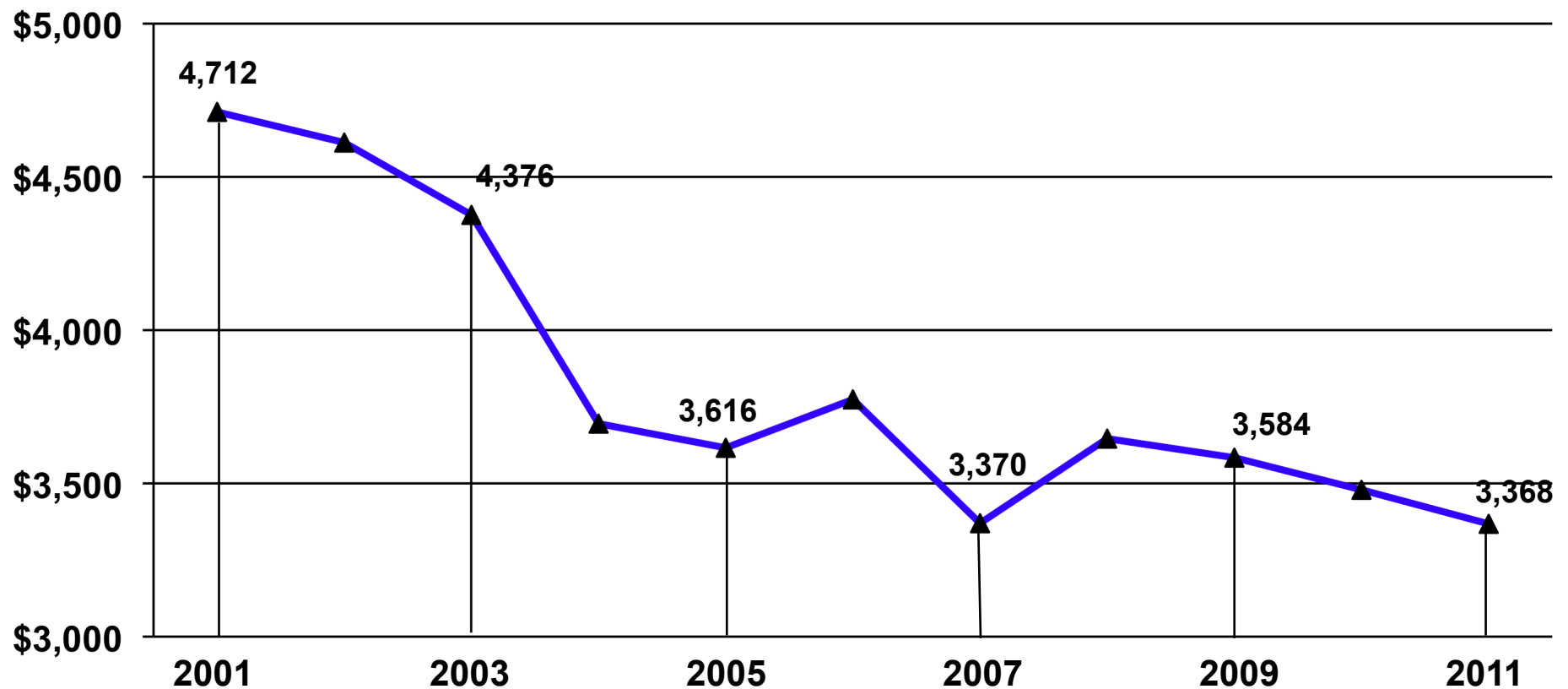
*Comparison of general fund revenue sources FY1972 to FY2011*

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## Success and New Context

### OU Funding Model – 23%

### State Appropriation Per FYES Comparison FY2000 – FY2011

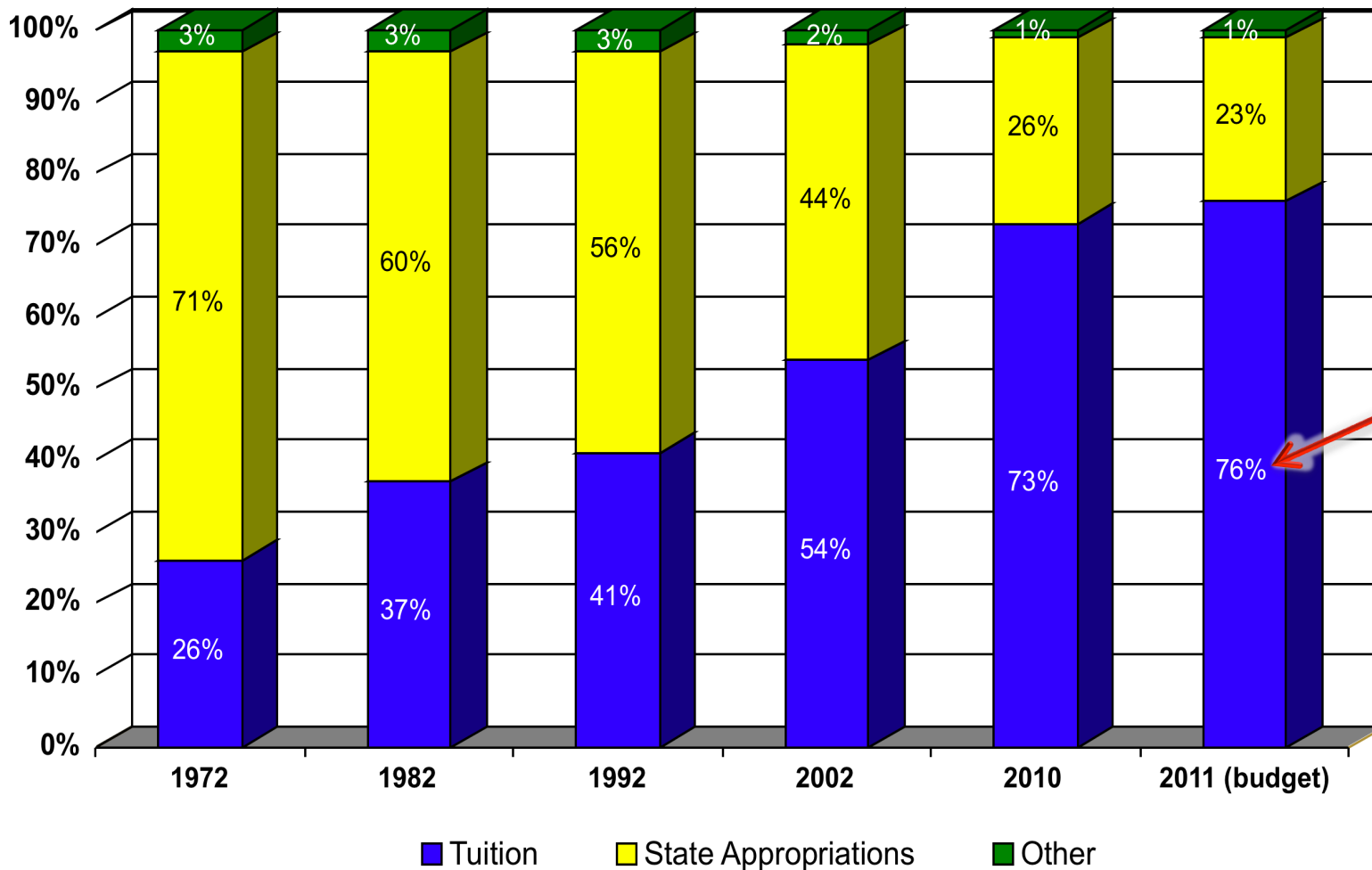


*Oakland University's FY2011 appropriation per FYES is estimated to be \$1,344 per FYES less than the FY2001 level.*

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### OU Funding Model – 76%

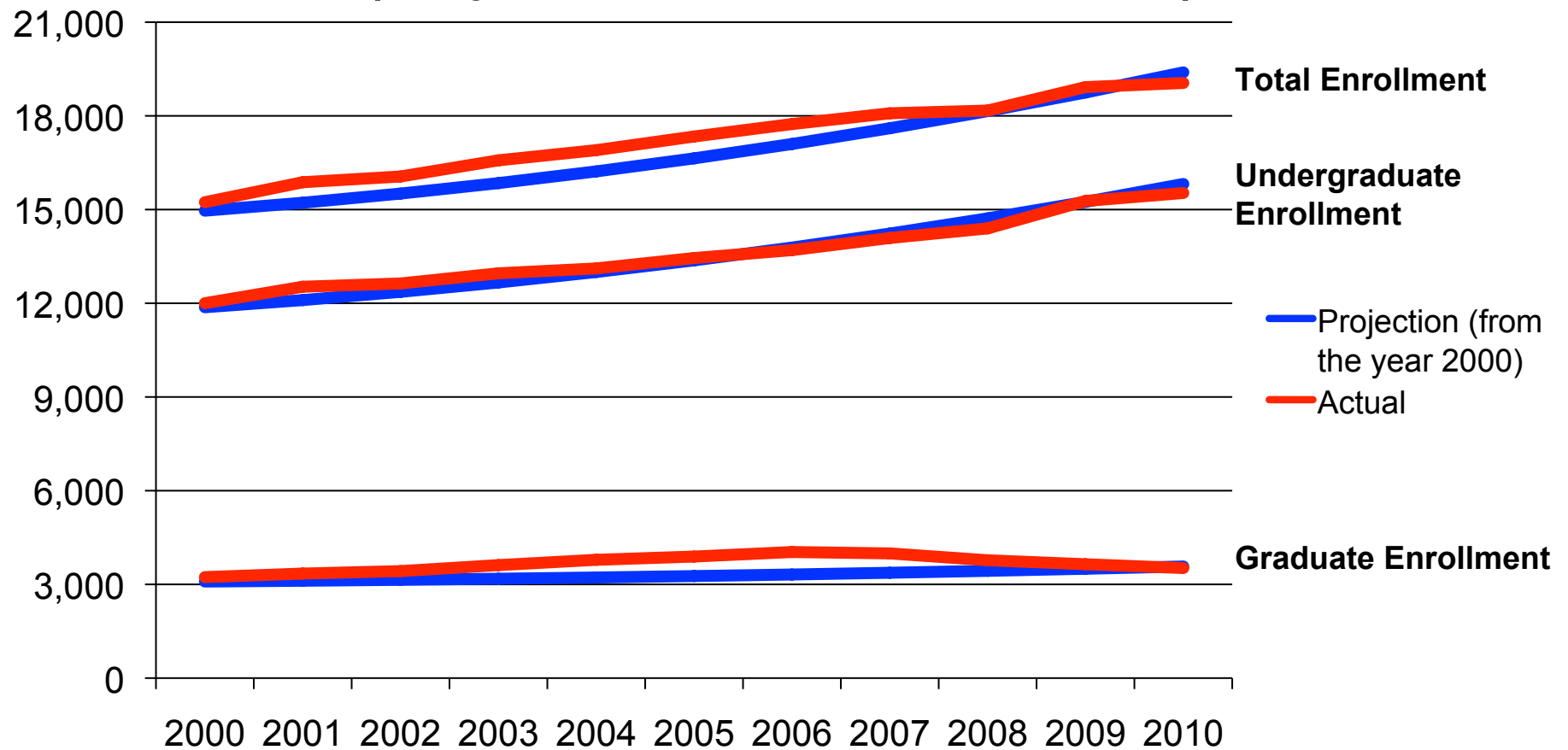


*Comparison of general fund revenue sources FY1972 to FY2011*

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## Success and New Context

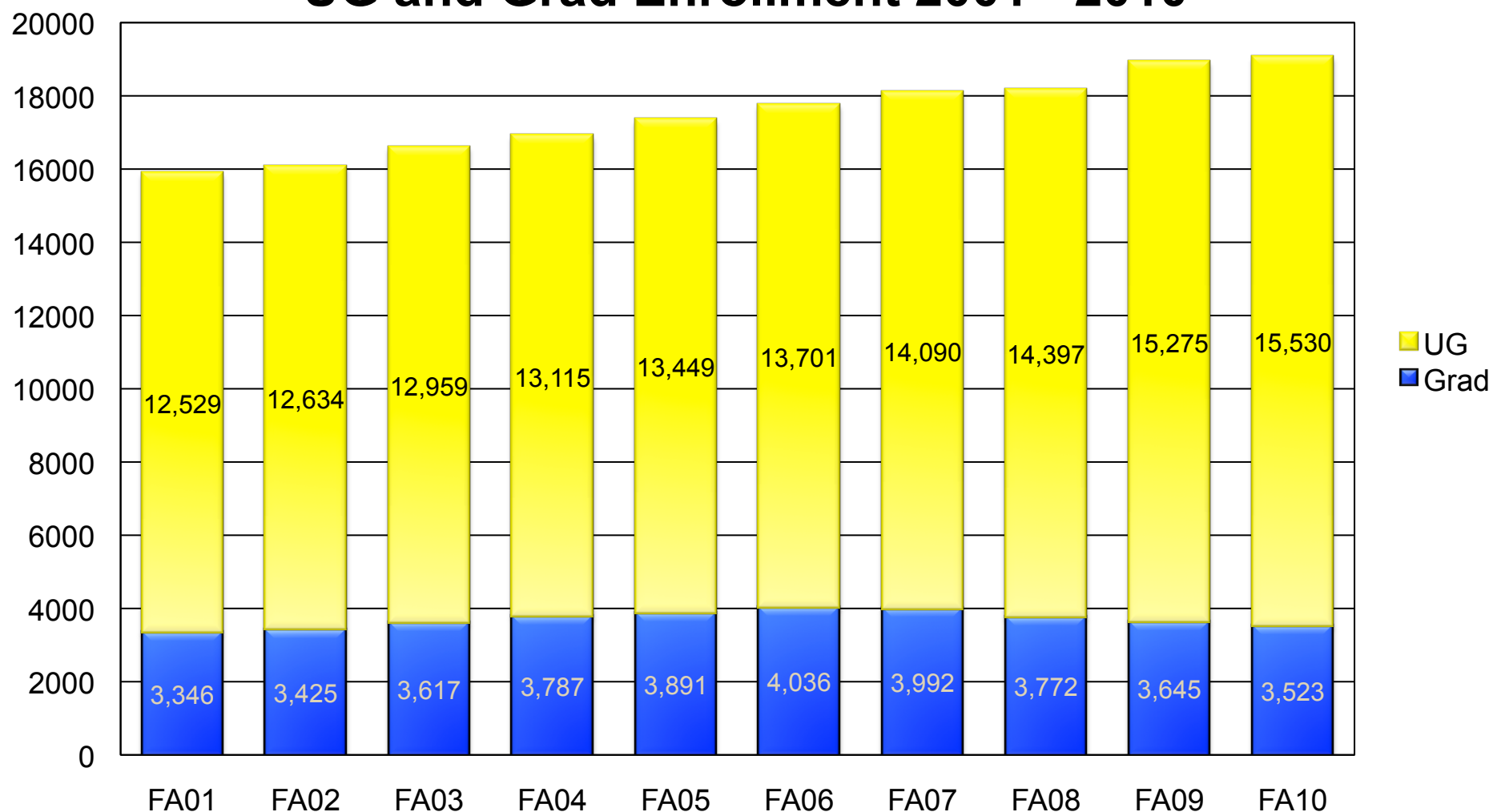
### OU Funding Model – 76% Enrollment, Actual vs. Projected (Projections from the Year 2000)



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## Success and New Context

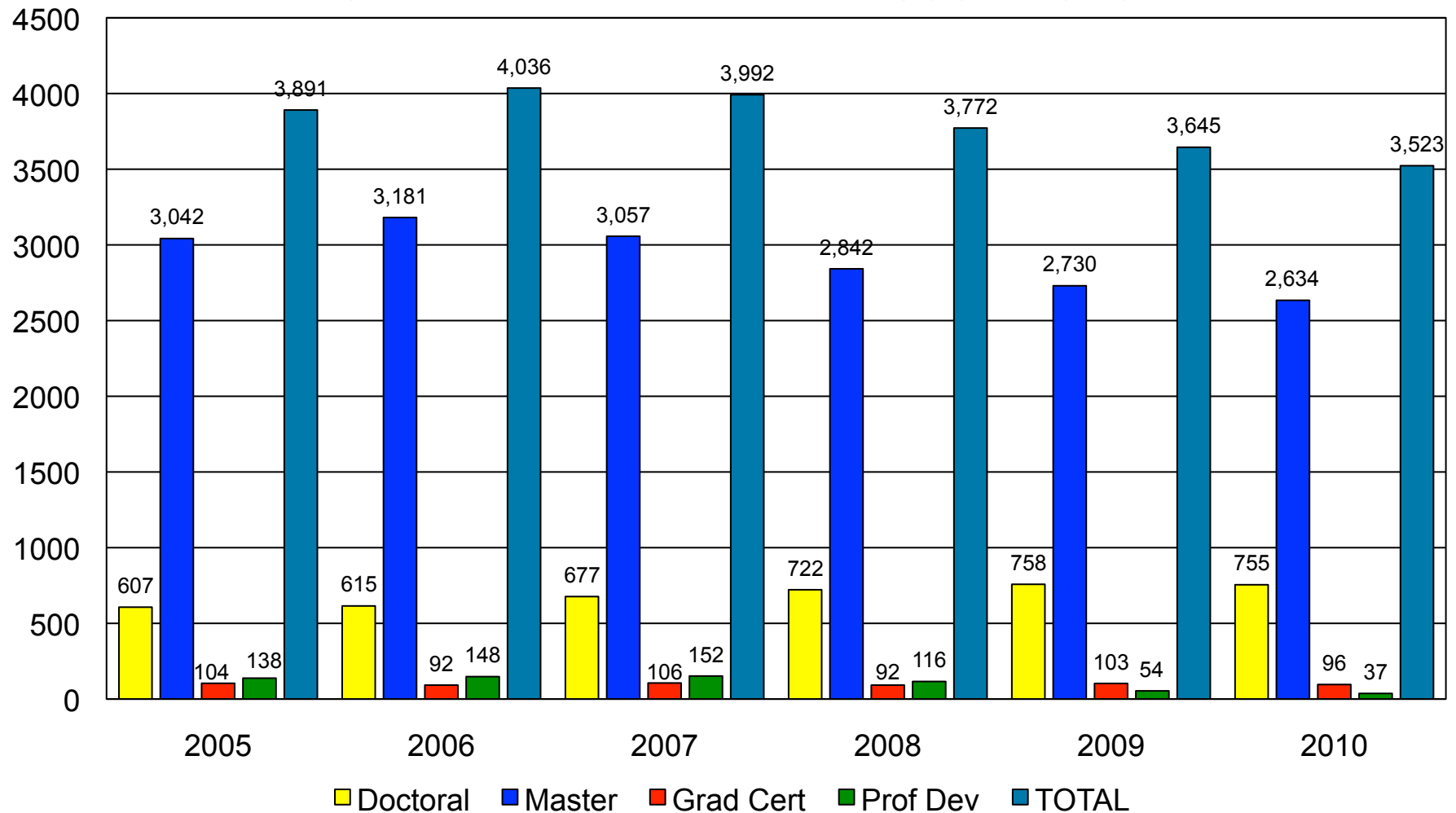
### OU Funding Model – 76% UG and Grad Enrollment 2001 - 2010



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## Success and New Context

### OU Funding Model – 76% Graduate Enrollment 2005 - 2010

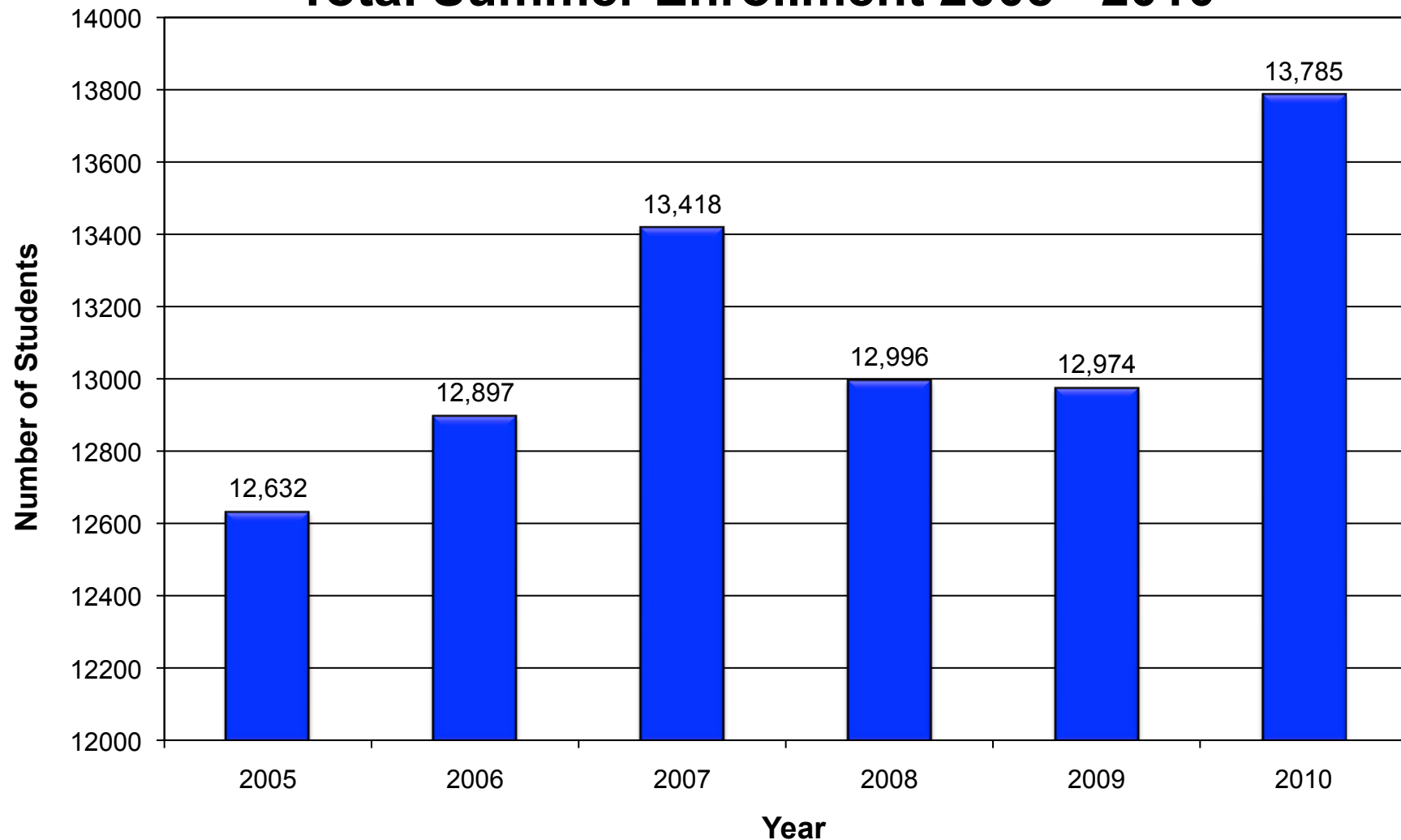


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## Success and New Context

### OU Funding Model – 76%

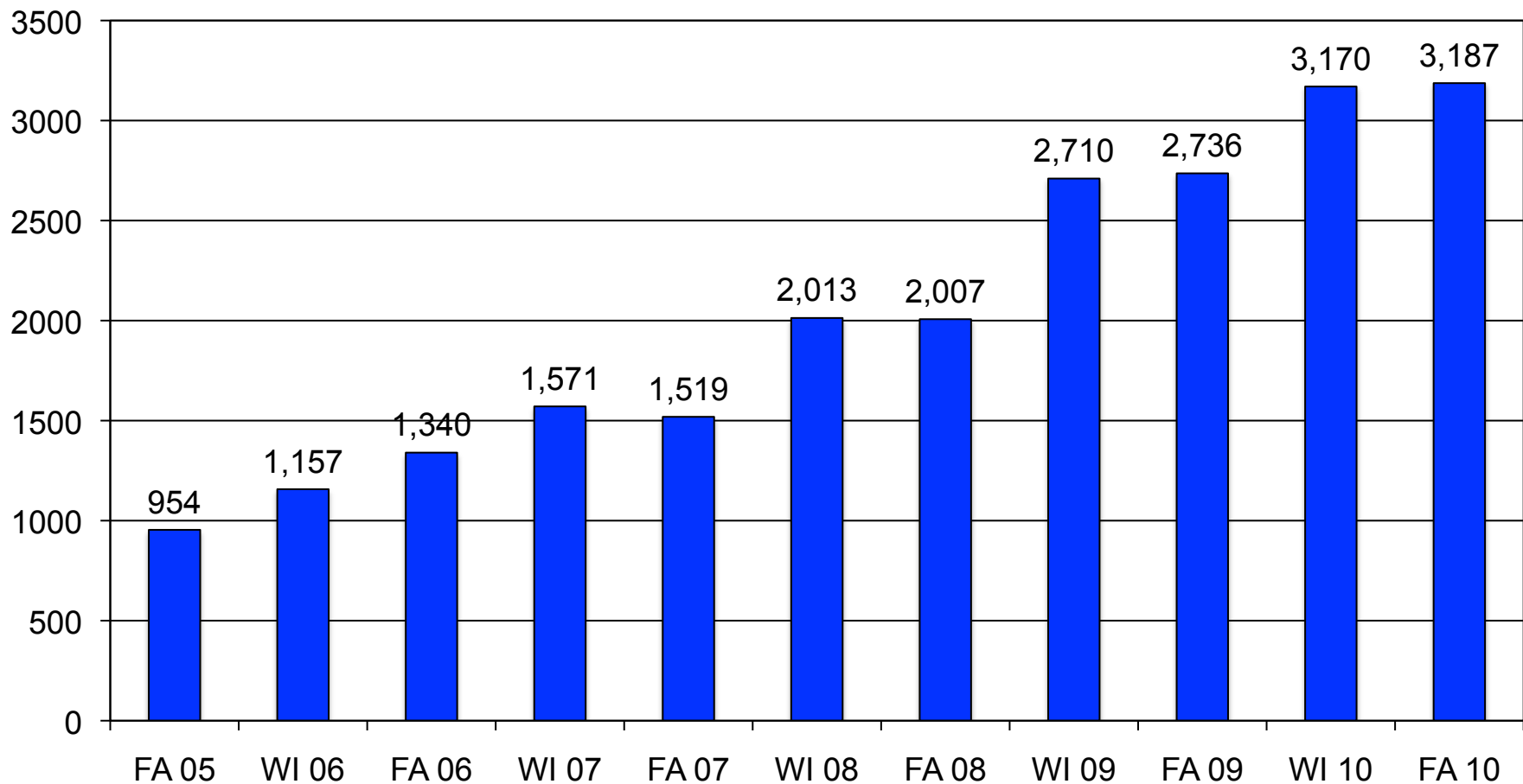
### Total Summer Enrollment 2005 - 2010



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## Success and New Context

### OU Funding Model – 76% Online Course Enrollment Enrollment in Online Courses





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## Success and New Context

### Comprehensive Campaign

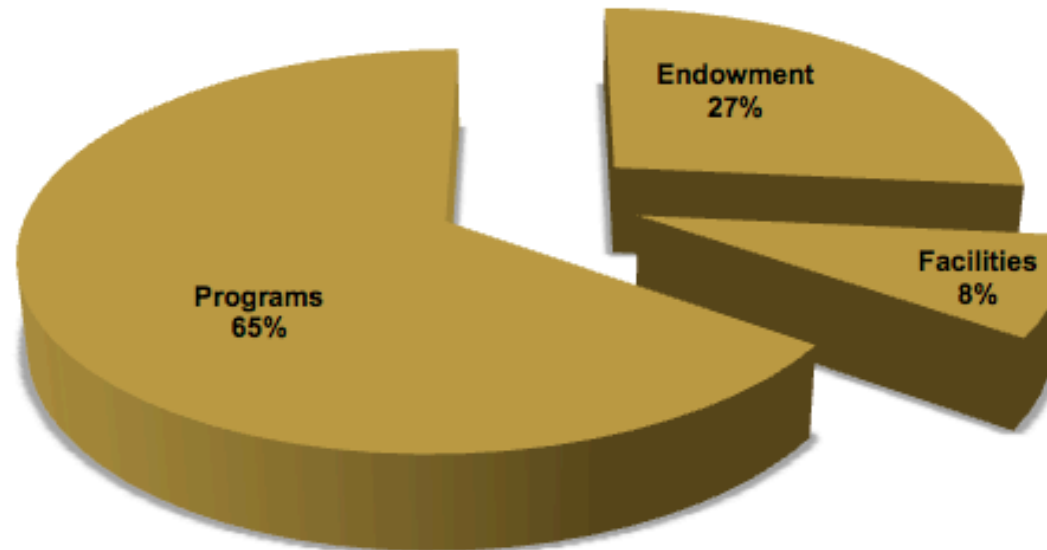
- Early conclusion - \$110 million raised a year ahead of schedule
- Of \$100 million raised:
  - 58 new endowments created
  - 86% of funds have come from commitments of \$25,000 or more
  - 53% of funds allocated to academic programs, 38% to endowments, 9% to facilities

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## Success and New Context

### Comprehensive Campaign

#### Campaign Commitment Breakdown



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## Success and New Context

### Endowment Market Values

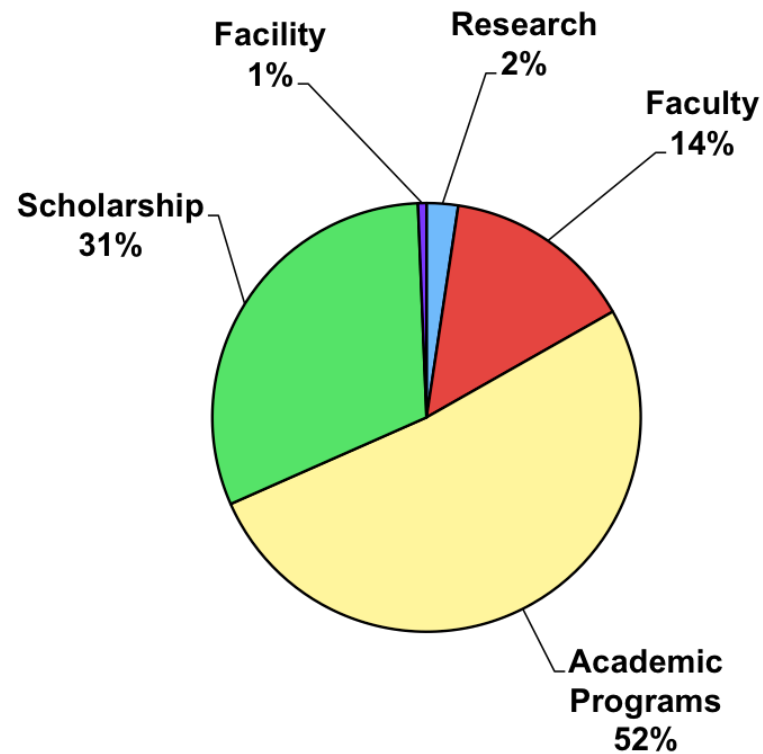
Date	Value	% Change
6/30/05	\$ 23,310,814	
6/30/06	\$ 36,548,030	56.8%
6/30/07	\$ 42,742,840	16.9%
6/30/08	\$ 50,199,491	17.4%
6/30/09	\$ 40,327,418	-19.7%
6/30/10	\$ 46,671,112	15.7%

Note: Market values are net of contributions, spending distributions, fees, investment income or loss, both realized and unrealized

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### Endowment Fund Purposes



# **Oakland University**

## **Success and New Context**

Numerous business, industry, government and non-profit agency partnerships providing resources to enrich academic and research activities.

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### **OU: The Leanest University** **Lean University – Validation**

Oakland University is one of seven research universities in the State of Michigan, yet it has one of the lowest operating costs per student in the State.

*Source: Delta Cost Project on Trends in College Spending and HEIDI*

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## Success and New Context

### **OU: The Leanest University – Lean Processes**

#### **Completed Projects & Reports**

- Academic Advising
- Staff Hiring Process
- Staff Performance Management
- Registration Process
- Spending Authority Process
- Payroll Process
- Admissions and Orientation Processes
- Scholarship Endowment Agreement Process
- Procurement Process
- Endowment Shared Management Accountability
- Contracting Process
- Banner Journal Voucher Management
- Accounts Payable – Check Processing
- Student Employment Process
- Office of the Registrar, Workflow Processes
- Transfer Orientation
- Electronic Admission Application Load Process

#### **Current Projects**

- Accounts Payable – Employee Reimbursements

**Budget Reductions & Cost Containment FY03-10: \$42M**

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## Success and New Context

### All-University Fund Drive

October 18–December 22, 2010

**Thanks to the support of 564 faculty, staff and retirees,  
the All-University Fund Drive raised**

**\$261,140**

**for Oakland University, United Way and BUF!**



- AUFD ended up over goal with 779 gifts compared to last year's total of \$226,811.12 from 745 gifts.
- The 2010 campaign was the best ever, which says a lot about the commitment of OU Faculty and Staff.



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## Success and New Context

### Selected Megatrends

- The context in which we are working is rapidly changing.
- Economic, technological and political forces reshaping higher education.
- Higher education budget cuts and mergers making it difficult to advance quality.
- Globalization will influence and shape all aspects of teaching and learning.
- The wide range of ability, preparedness, background, opportunity, and motivation of higher education students will require more varied and holistic approaches to inclusive learning.

*Sources: Kellogg Commission on the Future of State and Land-Grant Universities, "Renewing the Covenant: Learning, Discovery, and Engagement in a New Age and Different World, 6<sup>th</sup> Report" and The Future of Learning: 12 Views on Emerging Trends in Higher Education by William J. Flynn and Jeff Vredevoogd, Planning for Higher Education, January-March 2010*

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## Success and New Context

### Selected Megatrends, continued

- Advancements in technology will drive ongoing changes in all aspects of college and university life and offer new opportunities to enhance and broaden learning experiences.
- Interdisciplinary learning will become increasingly common and popular.
- Students will take much greater control of their own learning as proactive producers and managers of their own learning solutions, materials, and portfolios.
- The average age of students will continue to rise; the mix of cultures, ages, and learning styles will become increasingly varied and rich.

*Sources: Kellogg Commission on the Future of State and Land-Grant Universities, "Renewing the Covenant: Learning, Discovery, and Engagement in a New Age and Different World, 6<sup>th</sup> Report" and The Future of Learning: 12 Views on Emerging Trends in Higher Education by William J. Flynn and Jeff Vredevoogd, Planning for Higher Education, January-March 2010*

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## Success and New Context

### Selected Megatrends, continued

- Competition for students and resources will force colleges and universities to sharpen their brands and identities and to distinguish themselves in new ways.
- Colleges and universities will become increasingly important parts of regional economic development, both in creating growth and taking advantage of it.
- Accountability and assessment tools will continue to become common in defining institutional effectiveness.

*Sources: Kellogg Commission on the Future of State and Land-Grant Universities, "Renewing the Covenant: Learning, Discovery, and Engagement in a New Age and Different World, 6<sup>th</sup> Report" and The Future of Learning: 12 Views on Emerging Trends in Higher Education by William J. Flynn and Jeff Vredevoogd, Planning for Higher Education, January-March 2010*

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### High Performance Curricular Trends

- First-Year Seminars and Experiences
- Common Intellectual Experiences
- Learning Communities
- Writing-Intensive Courses
- Collaborative Assignments and Projects
- Undergraduate Research
- Diversity/Global Learning
- Service Learning, Community-Based Learning
- Internships
- Capstone Courses and Projects

*Source: Kuh, George, "High-Impact Education Practices: What They Are, Who Has Access to Them, and Why They Matter," AAC&U, 2008.*

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## Success and New Context

### Michigan Economic and Job Trends

#### Michigan and Manufacturing Through Sickness and Health

	<u>Manufacturing as a % of Total Employment</u>		Total Employment Loss	Earnings per Worker
	2002	2010		
Detroit MSA	13.77%	8.77%	150,000	\$83,794
Michigan	14.33%	9.74%	288,000	\$73,261
Nationally	9.61%	7.09%	3,507,000	\$68,000

**Michigan is re-aligned with the U.S. economy**

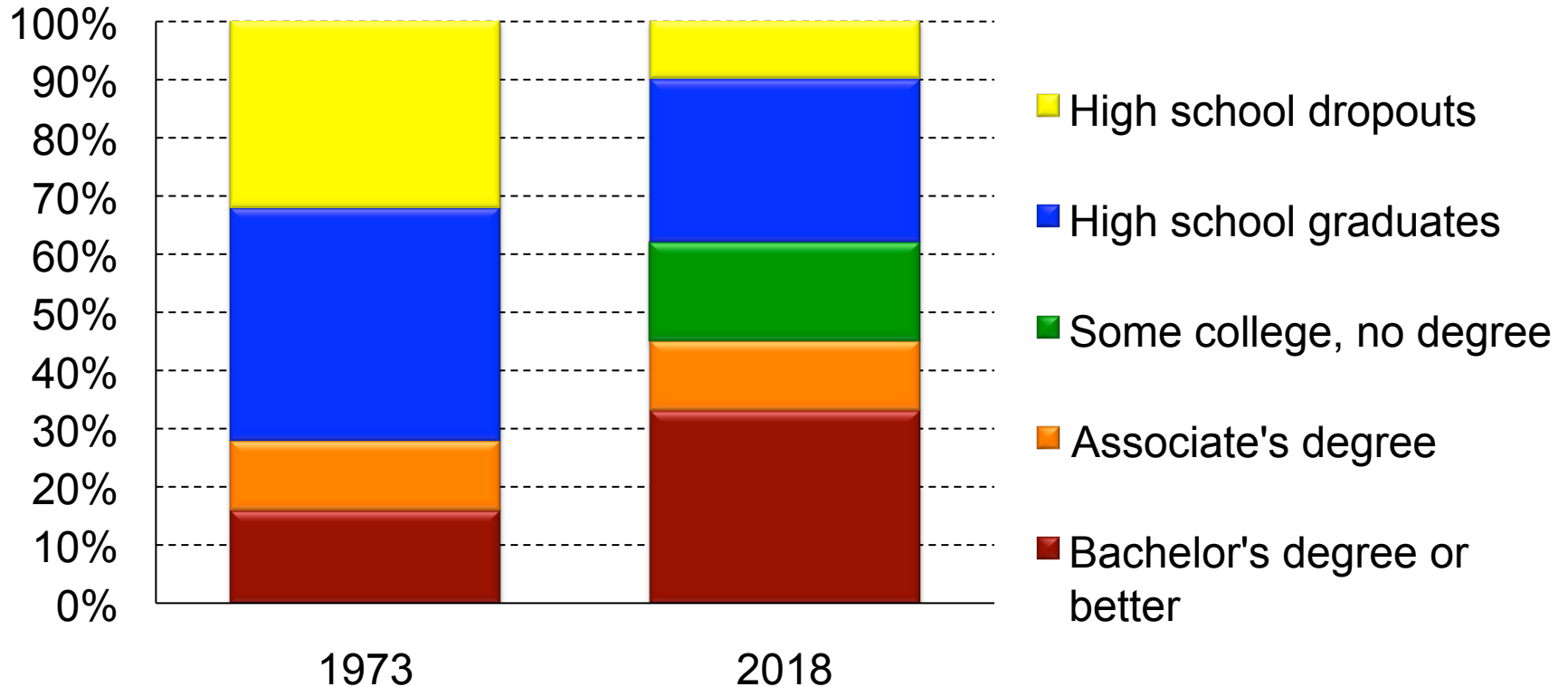
*Source: Public Sector Consultants, 360° Environmental Scan Presentation, November 22, 2010*

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## Success and New Context

### Michigan Economic and Job Trends Higher Education is the Gateway to the New Economy

#### U.S. Jobs Available by Educational Attainment



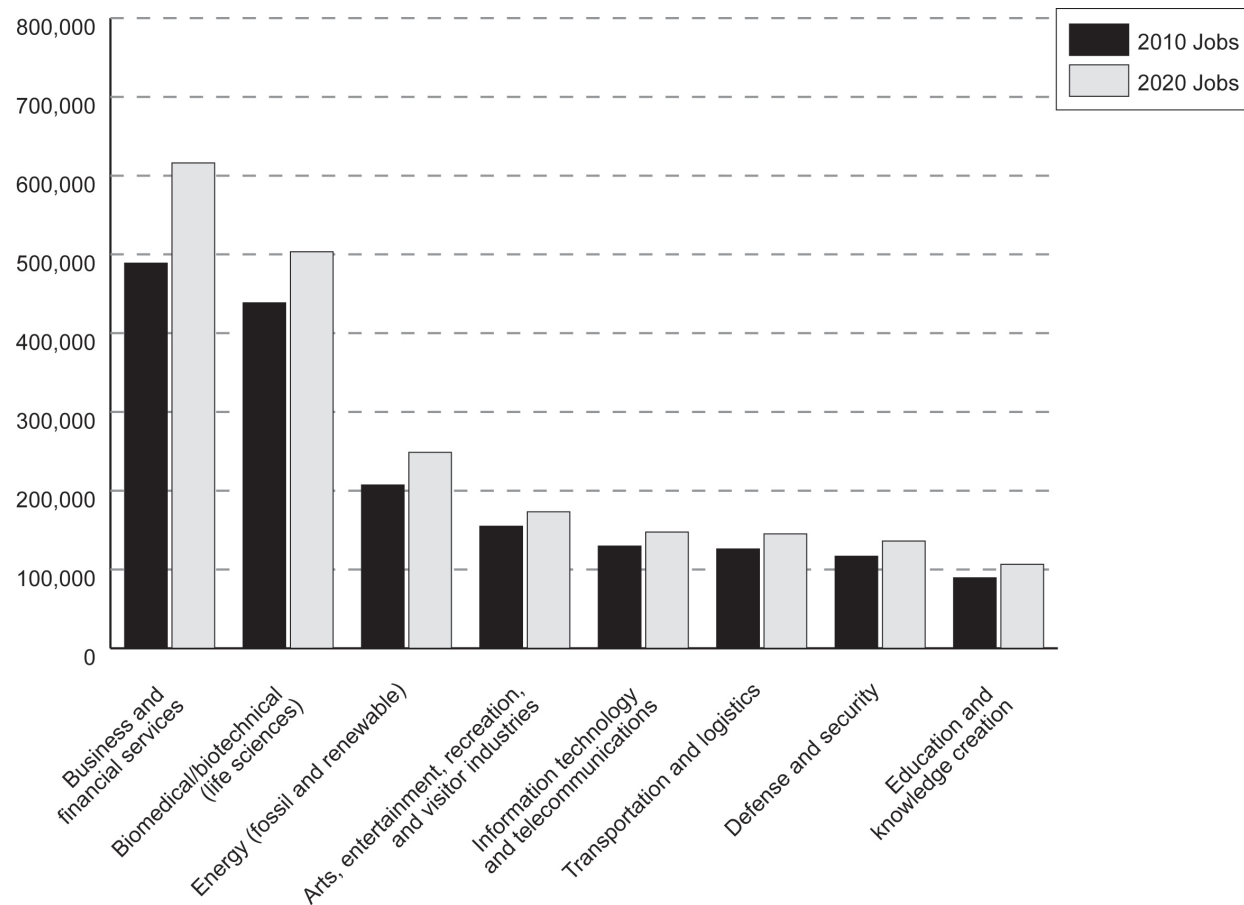
Source: Public Sector Consultants, 360° Environmental Scan Presentation, November 22, 2010

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## Success and New Context

### Michigan Economic and Job Trends

#### Michigan's Fastest-Growing Occupations, 2010 - 2020



Source: Public Sector Consultants, 360° Environmental Scan Presentation, November 22, 2010

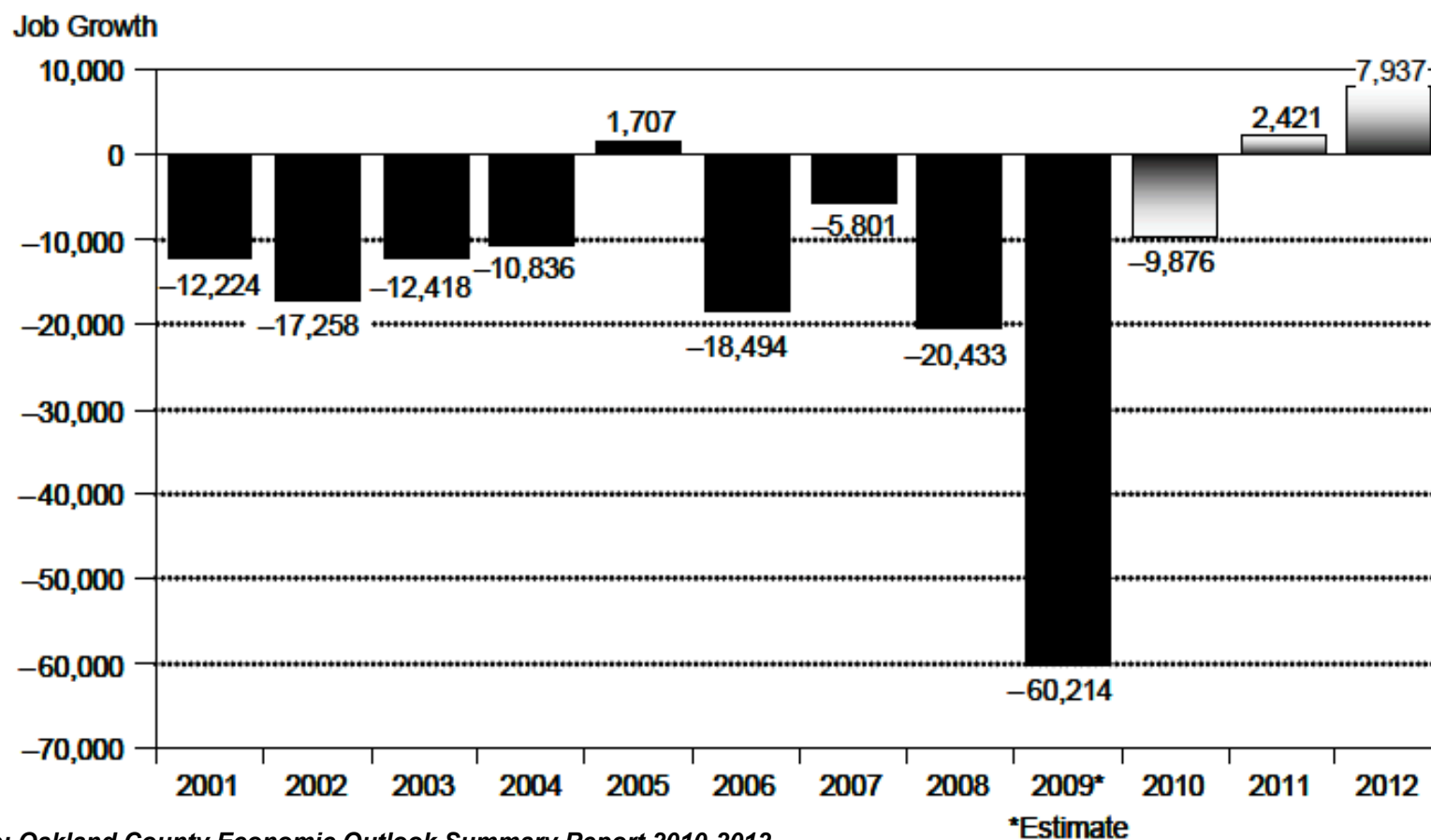


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## Success and New Context

### Michigan Economic and Job Trends Oakland County

Figure 11  
Job Growth in Oakland County, 2001–12



Source: Oakland County Economic Outlook Summary Report 2010-2012

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### Michigan Economic and Job Trends Higher Education's Critical Role

- Between 2008 and 2018, new jobs in Michigan requiring postsecondary education and training will grow by 116,000, while jobs for high school graduates and dropouts will grow by 22,000.
- 62% of Michigan's jobs in 2018 will require postsecondary training.
- There will be no shortage of jobs, only a shortage of Americans and Michiganders to fill them.

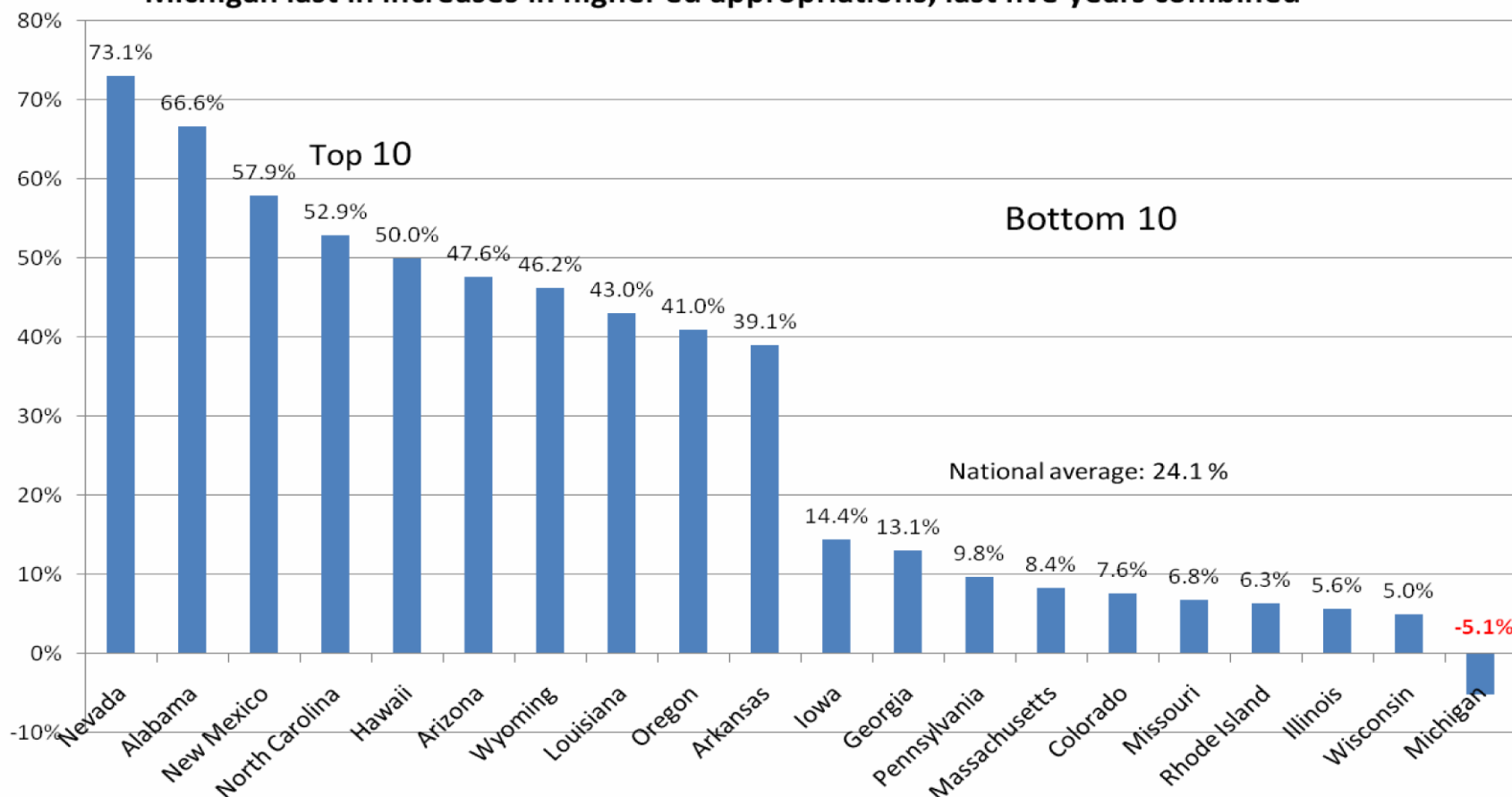
*Source: Public Sector Consultants, 360° Environmental Scan Presentation, November 22, 2010*

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### Michigan Economic and Job Trends Disinvestment in Higher Education

Michigan last in increases in higher ed appropriations, last five years combined



Growing states like Nevada, Alabama and North Carolina are stepping up investment in higher education

Source: Illinois State University's "Grapevine Project"  
<http://www.grapevine.ilstu.edu/>

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### Political Trends

#### Landscape

- New Governor, Lt. Governor, administration and cabinet
- All four of the state legislative leaders are new to their role
- 61 of the 110 State House members are new to the legislature and state government
- 28 of the 38 senators are newly-elected
- New Secretary of State and Attorney General
- Five of the 15 member U.S. Congressional delegation are new; Michigan is expected to lose one seat due to being the only state in the nation to lose population in the last 10 years.
- The State Supreme Court and all of the elected education and university boards previously held by a Democratic majority are now controlled by Republicans.

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### Political Trends

#### **Administrative/Legislative Priorities and Themes**

State at a crossroads and in a crisis mode; change is inevitable.

Potential proposed solutions:

- Reforming and restructuring the way the state operates, including the consolidation of services
- Elimination of the Michigan Business Tax and replacing it with a flat 6% business tax (\$1.5 billion)
- Shared sacrifice, more accountability, and outcome-based measures
- Government wage and/or benefit concessions
- Creation of an entrepreneurial or "can do" spirit
- Mergers and consolidation
- Enhancing the role of central cities and economic development in stopping the education brain drain
- July 1 budget deadline and a two-year budget proposal
- Elimination of tax loopholes

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## **Success and New Context**

### **Political Trends**

### **Budget/Revenue Realities**

- Current fiscal year revenues are slightly higher than expected; mid-year cuts not anticipated.
- The 2012 state fiscal year, which begins October 1, 2011 and ends September 30, 2012, is projected to have \$1.8 billion less revenues than the current fiscal year.
- Administrative proposal to eliminate the Michigan Business Tax would reduce state revenues by an additional \$1.5 billion IF replacement revenues are not proposed and enacted.

# **Oakland University**

## **Success and New Context**

### **Political Trends**

#### **Role of Government Relations**

- Establishing and cultivating relationships at the state, federal, county and local levels.
- Increasing awareness of and support for Oakland University's role, programs, policies and initiatives to make the region and state a better place to live, work, do business and get a top-notch post-secondary education.

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### Political Trends

The bottom line, in the world of government and politics, is best reflected in the following quote, attributed to former President Franklin D. Roosevelt:

*"In politics, nothing happens by accident. If it happens, you can bet it was planned that way."*





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### Fundraising Trends State of Fundraising – Key Findings

- ❖ Cash flow for operating gifts (FY2010 over FY2009)
  - ~ A modest growth of 1% in unrestricted gifts
  - ~ A 10% growth in restricted gifts

**Note:** In recent years, donors have increasingly favored current operating gift requests that support specific institutional priorities over unrestricted annual fund appeals.

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### Fundraising Trends State of Fundraising – Key Findings

- ❖ New pledges for capital gifts (FY2010 over FY2009)
  - ~ Support for endowment up 54%
  - ~ Support for facilities and equipment down 50%

**NOTE:** Both institutions and donors are likely to place greater emphasis on endowment during difficult economic times as endowment generally helps underwrite an institution's overhead.

Current gifts and capital gifts respond to different economic indicators. Current gifts historically increased at the same rate as personal income in the U.S. Capital gifts have reflected changes in the equity market and are subject to greater fluctuations.

*Source: Marts & Lundy, Fall 2010*

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### Fundraising Trends State of Fundraising – Key Findings

- ❖ Alumni participation (FY2010 over FY2009)
  - ~ Held steady between FY2009 and FY2010, with an average increase of 1%
  - ~ Alumni participation has continued to erode over the past 15 years, with a slight increase during the past year after a bigger than normal decrease in FY2008 – FY2009

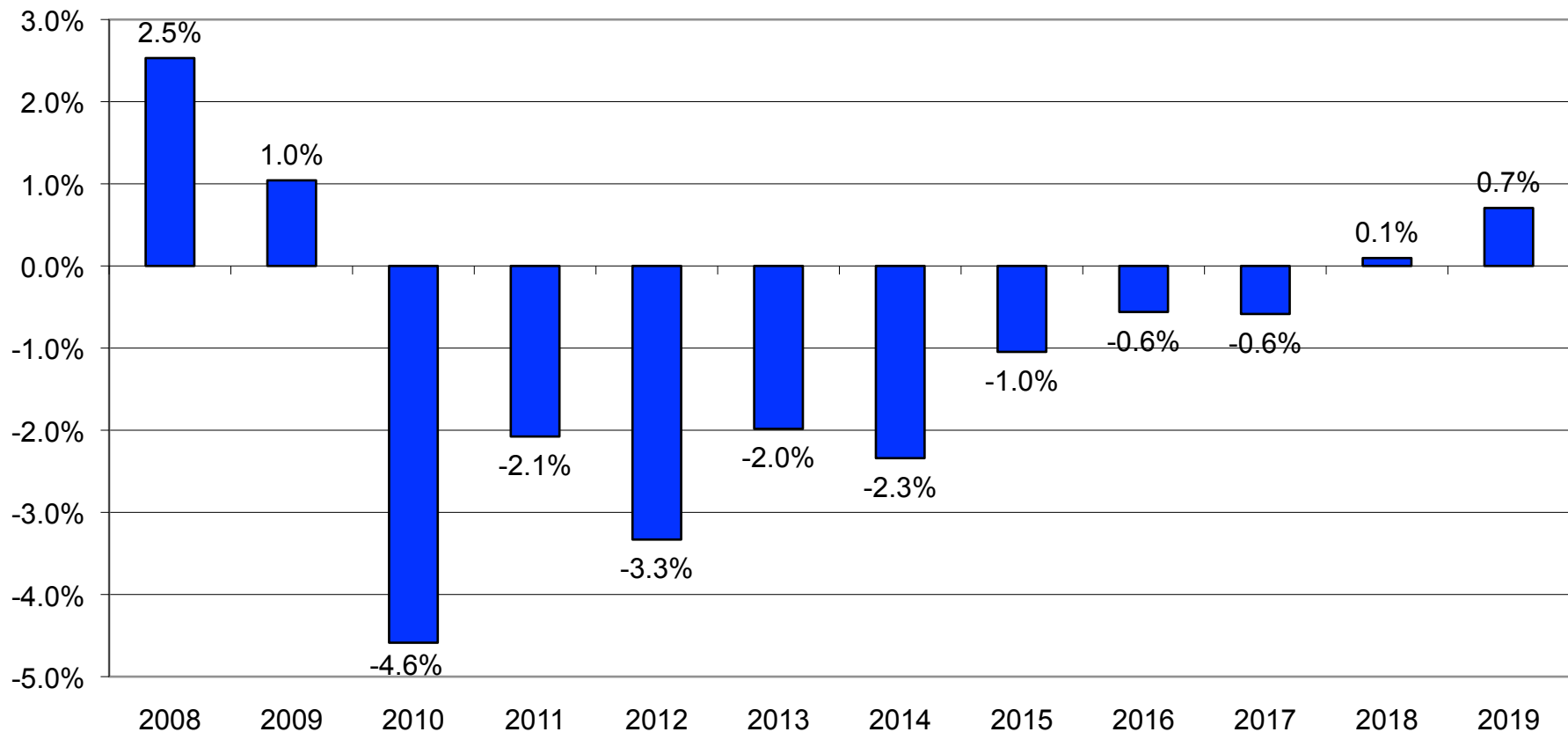
*Source: Marts & Lundy, Fall 2010*

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## Success and New Context

### Demographic Trends

#### NCES Projections of Percent Change in Michigan High School Graduates, 2008-2019



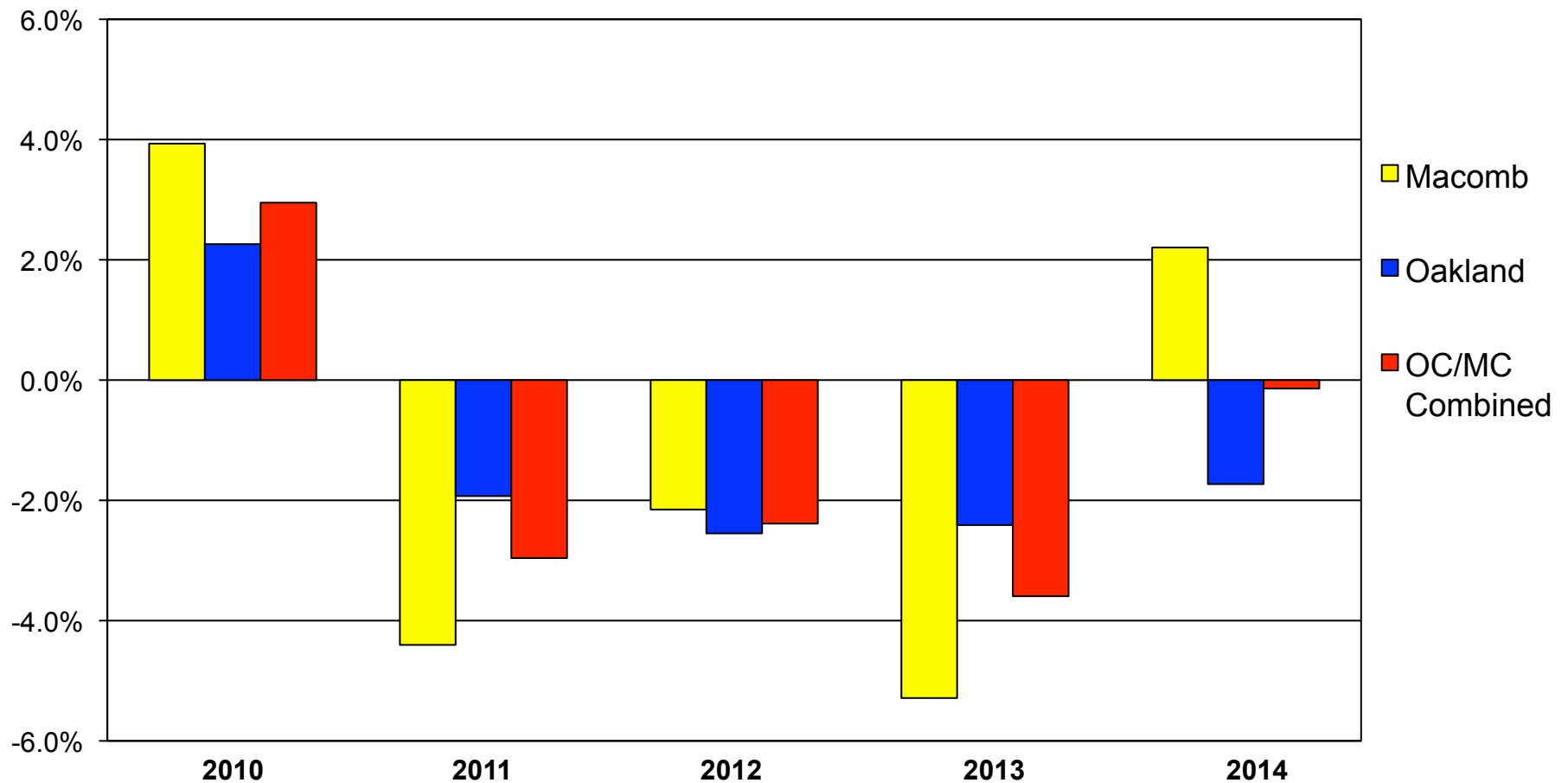
Source: NCES Projections of Education Statistics September 2009

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## Success and New Context

### Demographic Trends

#### Comparison of Projected Change in High School Graduates - Macomb County & Oakland County

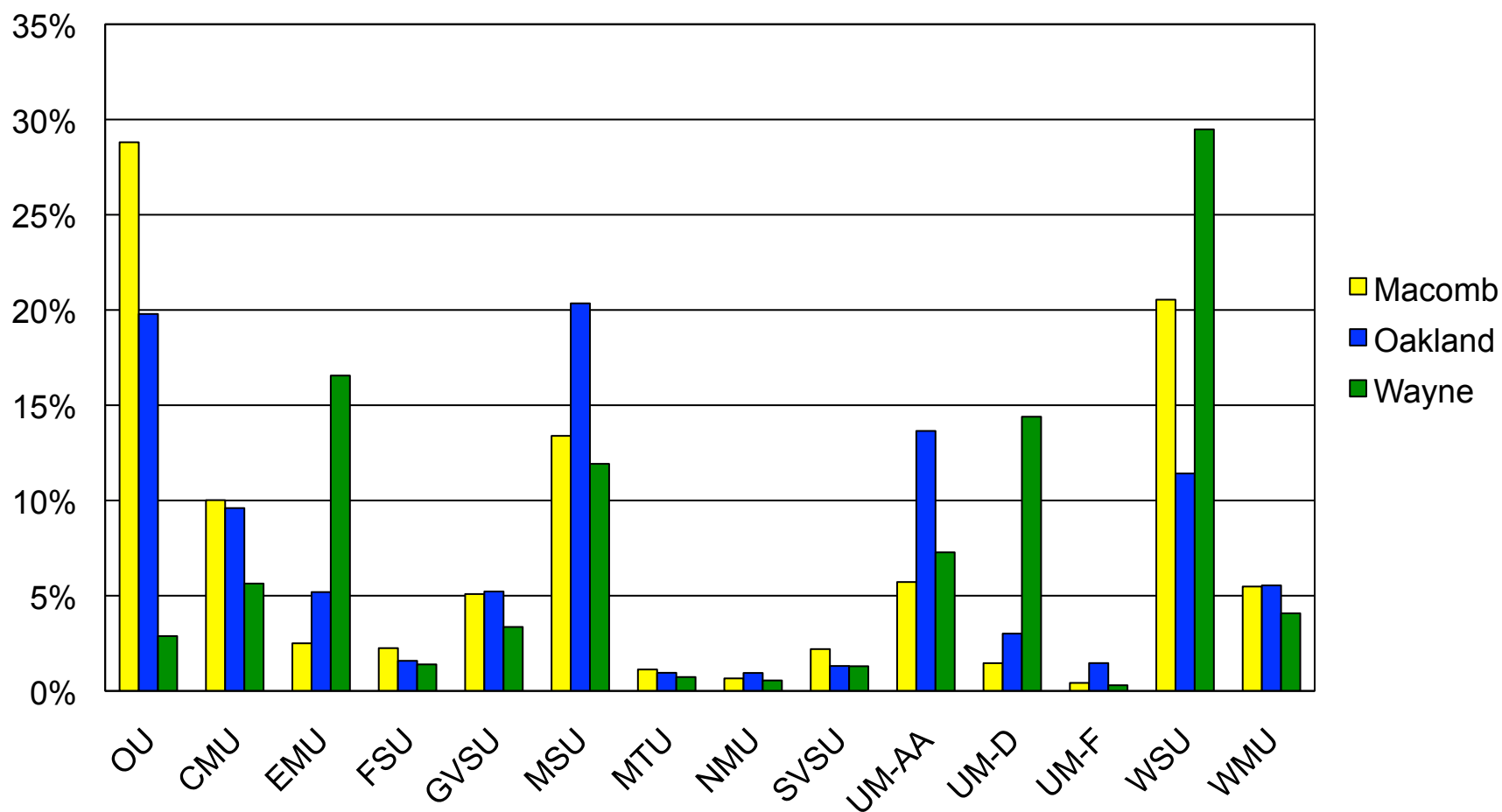


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### Competitor Trends

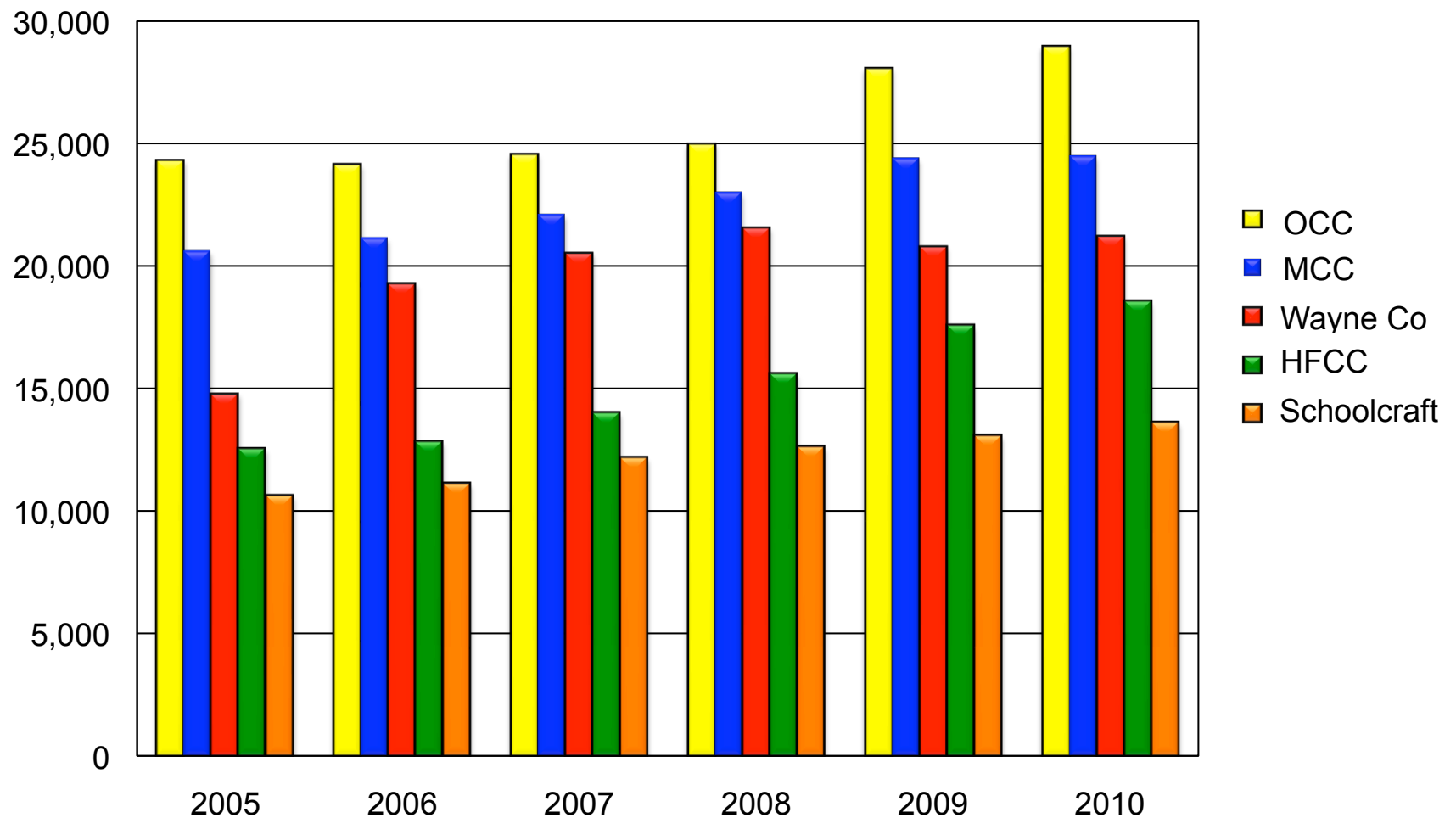
#### 2009 UG Enrollment for Macomb, Oakland, Wayne



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## Success and New Context

### Competitor Trends Community College Enrollment



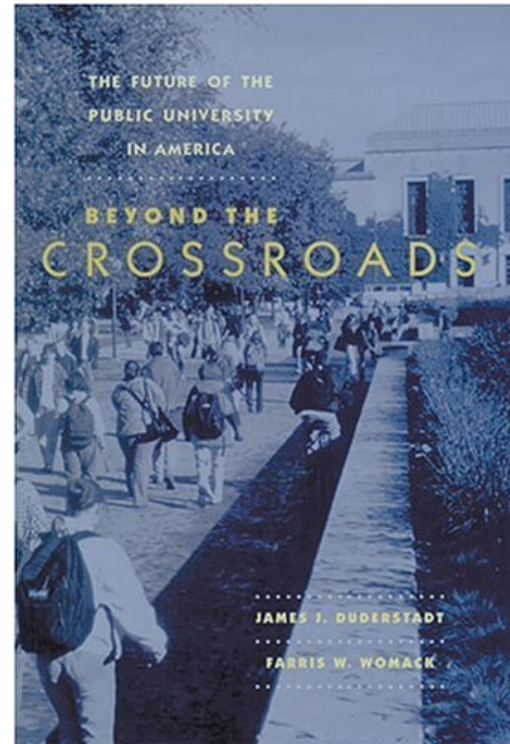
# Oakland University

## Success and New Context

### Reference

#### The Future of the Public University in America: Beyond the Crossroads

- James J. Duderstadt
- Farris W. Womack





# Oakland University

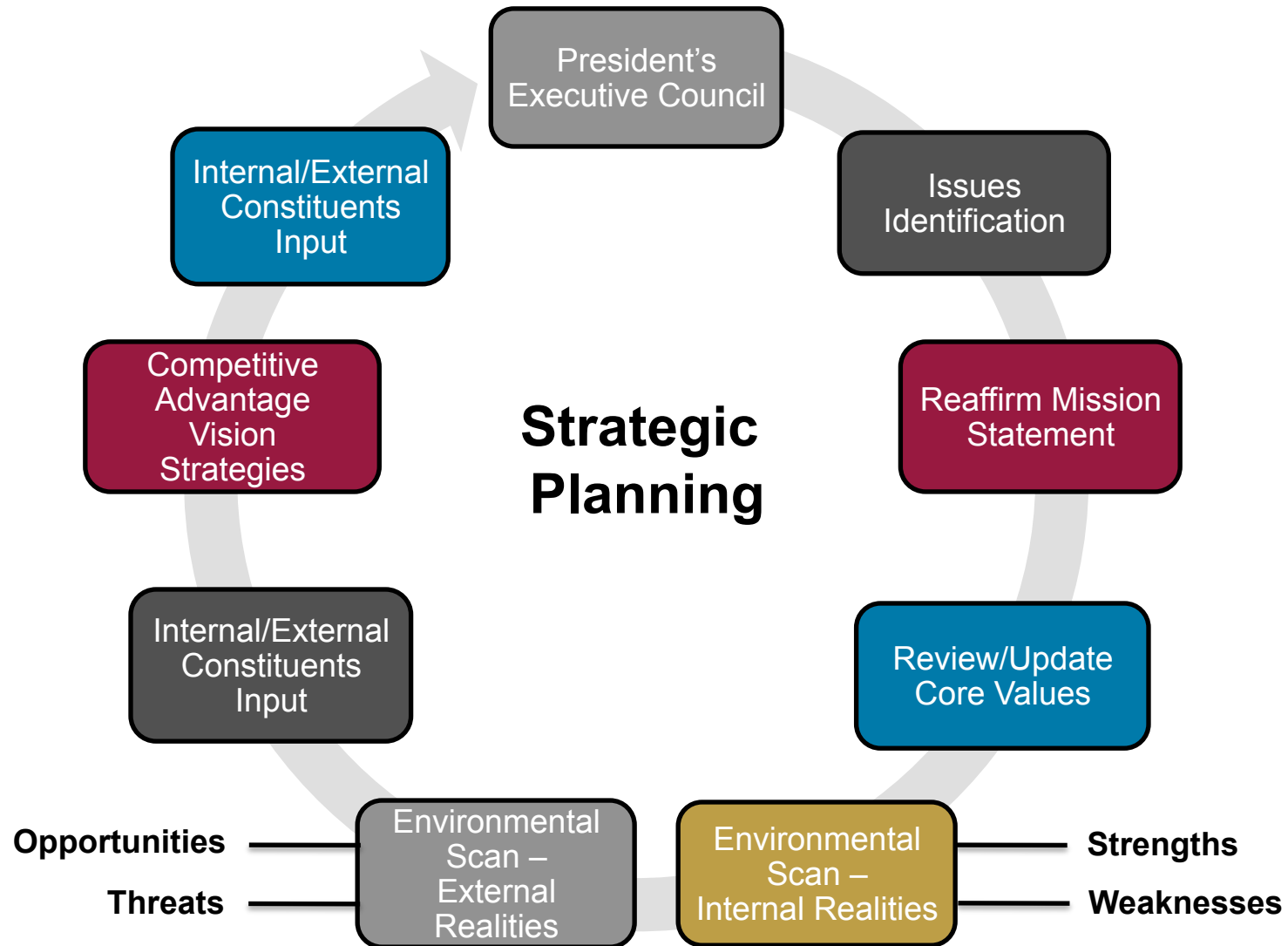
## Success and New Context

### **Our Response Is to Create the Future**

- Continue building on a remarkable record of perseverance and success.
- Actively identify and seize opportunities.
- Be aware and address forces/threats designed to compromise OU's growth and development.
- Stay the course to implement our strategic direction while periodically updating our strategic goals.
- Establish professional, civil decorum and discourse based on objectivity to advance OU.

# Oakland University

## Success and New Context



*President's Executive Council, Revised 12/15/2010*

# Oakland University

## Success and New Context

### Action Agenda Competition

- OU is also entering a period of **intense competition** within the higher education industry. There are about 3,000 four-year institutions throughout the nation<sup>1</sup>, and community colleges, including the established community colleges surrounding OU, are pursuing four-year degree programs. Meanwhile, elite four-year institutions have built up enormous endowments to attract top students and faculty regardless of economic status or discipline. OU must identify and intensely pursue its **competitive advantages**.

*Source: Public Sector Consultants, "Oakland University 360-Degree Environmental Scan," December 2010*

<sup>1</sup> *The National Center for Education Statistics shows a total of 2,719 four-year degree-granting institutions in 2009, although this number includes branch campuses.*

# **Oakland University**

## **Success and New Context**

### **Competitive Advantage**

**Young**

**Smart**

**Global**

*Source: Consultant, Michigan Presidents' Council*

# Oakland University

## Success and New Context

### Building a Legacy Institution: Making OU's Presence Felt

#### **Teaching Emphasis with a Difference**

- We should pay REAL attention to how OU educates its students.
- High dropout rate tells the story of us not being able to keep them engaged.
  - We are by no means alone in this regard.
- We could take the bold step of **teaching every student until he/she ATTAINS a given level of proficiency.**
- This step alone will make us stand out & serve our students & the state well.
  - And yes, it will make it easier to get to the desired target (currently at 25,000 students).

*Source: Anandi P. Sahu, Ph.D., Professor & Chair, Economics*

# Oakland University

## Success and New Context

### Building a Legacy Institution: Making OU's Presence Felt

#### **Making the Research Excellence Felt**

- Establishing a Public Policy Center to disseminate academic research.
  - It will generate recognition for the research at OU.
  - It will also serve the state and country by affecting public policy debates.
- Hire a few well-known researchers spread over several disciplines.
- Establish monetary rewards to promote research & scholarship.
  - This has now nearly disappeared.

# Oakland University

## Success and New Context

### Building a Legacy Institution: Making OU's Presence Felt

#### **Emphasize Classic Infrastructure**

- We are building an institution that will last for centuries.
- Let's learn from Varner Hall architecture & Meadow Brook Hall.
- Build the Institution as if you were building a temple.
  - Imposing main gates will be a good start.

# Oakland University

## Success and New Context

### Building a Legacy Institution: Making OU's Presence Felt

#### **Recognition Will Follow**

- We should be aiming to be a competition for MSU nationally.
- If we build the institution as visionary missionaries, the recognition will follow.
  - Short-term fixes and slogans often divert from our long-term mission.



# Oakland University

## Success and New Context

### **Action Agenda Program Development**

- Be strategic in program development
- Develop and resource top academic programs
- Move programs from the middle emphasizing quality (top market/mass market)
- Eliminate programs that do not work
- Grant immediate/temporary approval for critical new market driven programs
- Apply lean principles to new program development approval process
- Improve visibility of programs, many buried in departments. Students look for specifics.
- Leadership team to remove barriers to the development of high demand target programs

# Oakland University

## Success and New Context

### Action Agenda Liberal Arts / Fine Arts

- As the value of a strong liberal arts background increases and the creative class rises, OU's complement of liberal arts education for all students and its recognized fine arts program give it an advantage in preparing students for the new economy.

# **Oakland University**

## **Success and New Context**

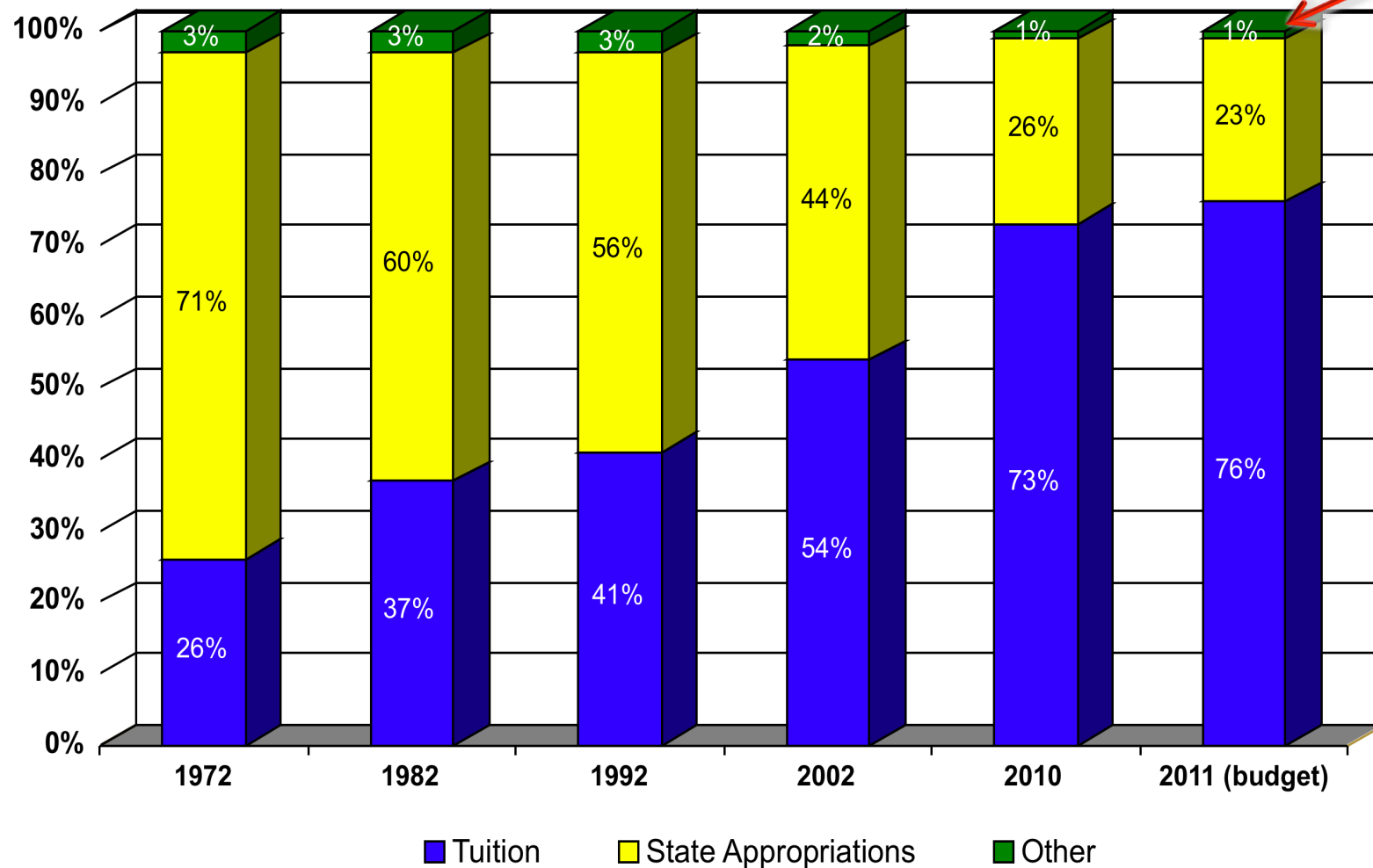
### **Consider A Center for Non-Completers**

1,400,000 Non-Completers in Michigan

# Oakland University

## Success and New Context

### OU Funding Model – 1%



*Comparison of general fund revenue sources FY1972 to FY2011*

# **Oakland University**

## **Success and New Context**

### **Action Agenda**

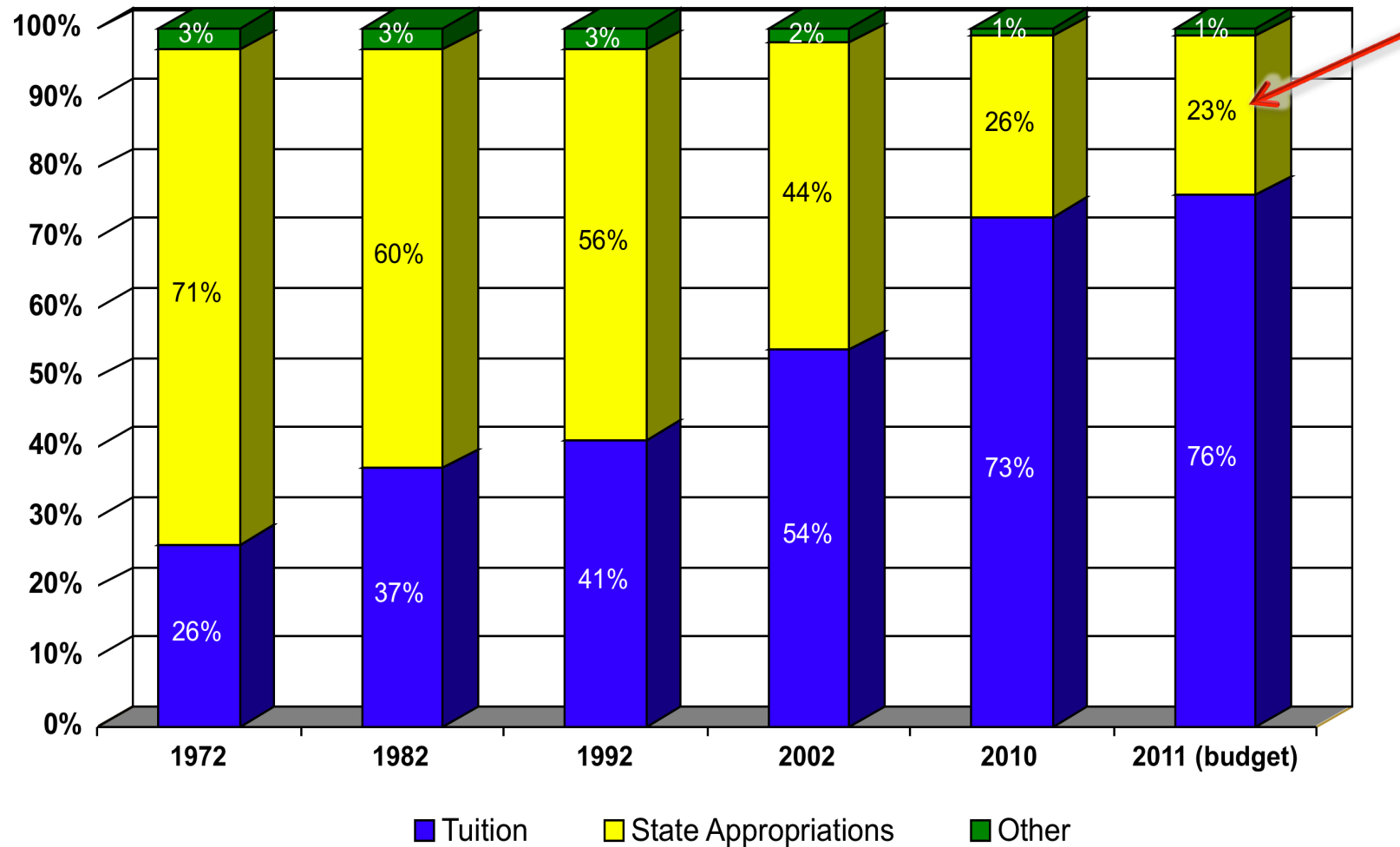
#### **Extramural Funding – Research**

- Peer institutions to be goal for level of extramural research funding
- Expand support and grow extramural funding
- Focus on hiring top quality faculty to secure or bring grants
- Leverage the School of Medicine and Beaumont Hospital research opportunities

# Oakland University

## Success and New Context

### OU Funding Model – 23%



*Comparison of general fund revenue sources FY1972 to FY2011*

# **Oakland University**

## **Success and New Context**

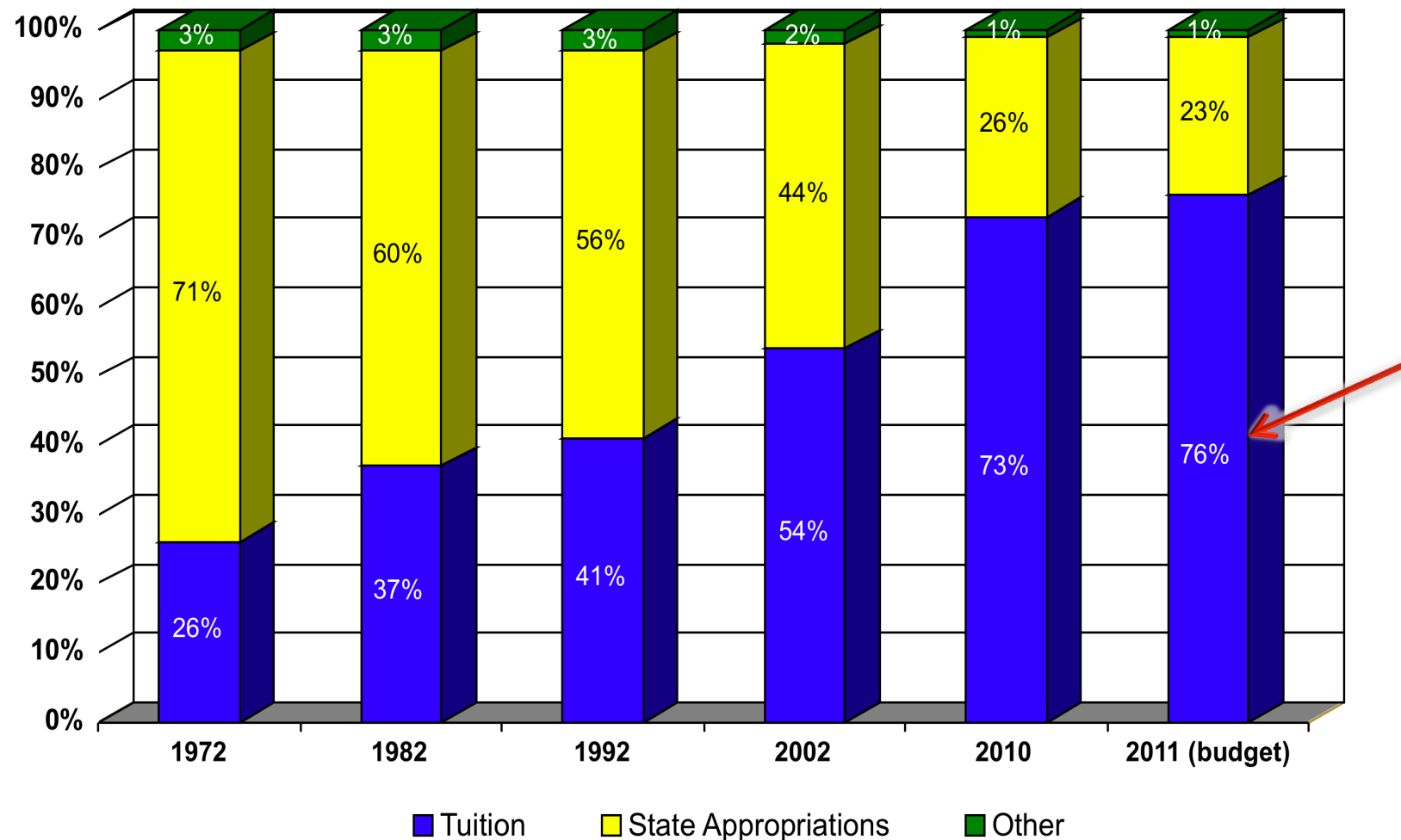
### **Action Agenda State Appropriations**

- Promote Higher Education
- Advocate for OU
- Lobby for OU
- Mobilize for OU
- Plan for Cuts

# Oakland University

## Success and New Context

### OU Funding Model – 76%



*Comparison of general fund revenue sources FY1972 to FY2011*



# Oakland University

## Success and New Context

### Enrollment Projections Getting to Higher Rates of Student Success

- 1<sup>st</sup> year retention
- Number of credits taken each year

	1998	2003	2004	2005	2006	2007	2008	2009	2011	2014	2018
1st Year Retention	75.5%	71.5%	70.5%	70.2%	73.3%	71.8%	74.4%	73.3%	76%	78%	80%
6-yr Grad Rate	46.7%	40.7%	39.7%	44%	45%	47%	48%	48%	50%	55%	60%

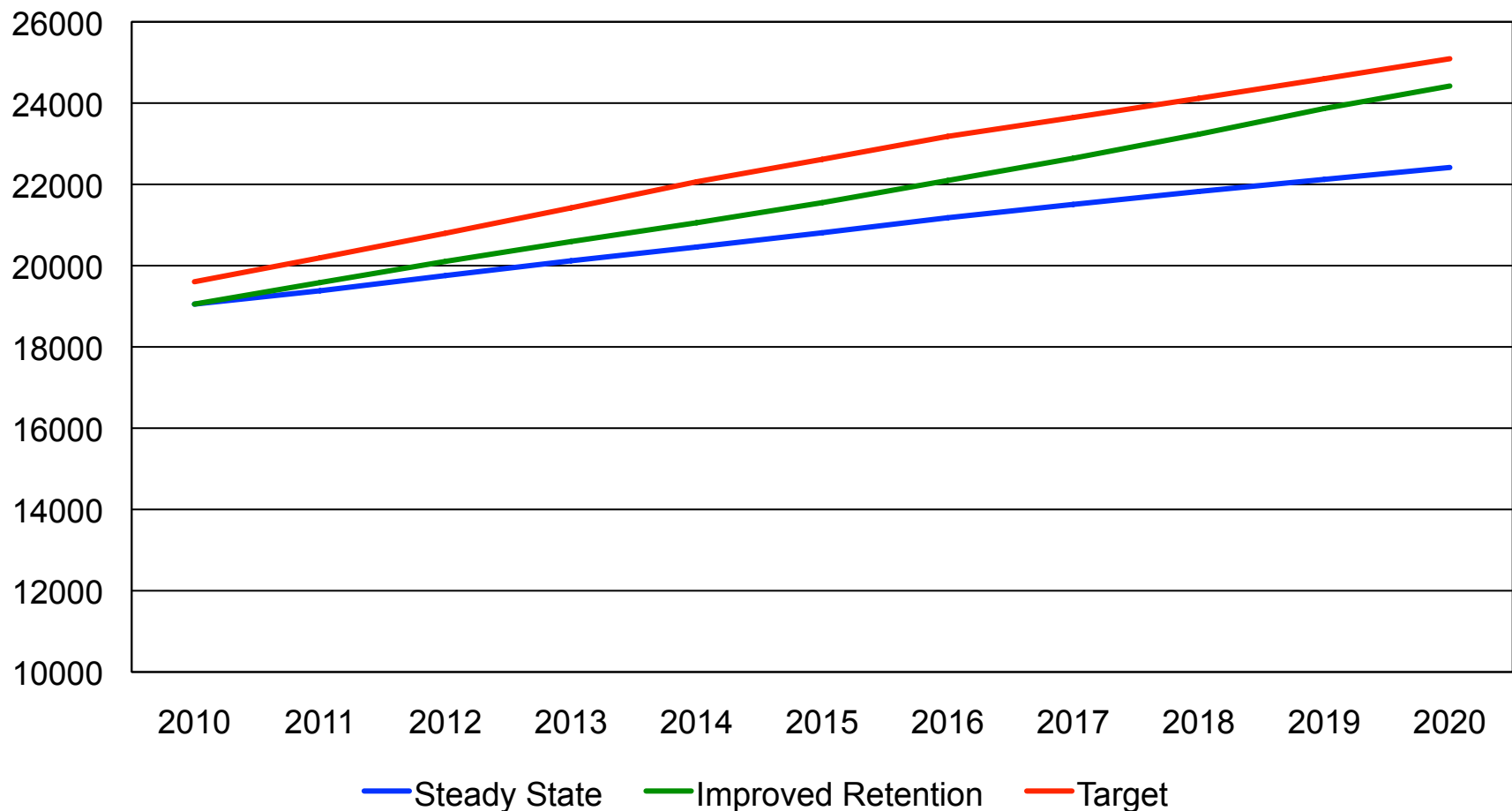
# Oakland University

## Success and New Context

### Enrollment Projections

#### 2020 Scenario – Increase FTIAC Retention

#### 2020 Scenario – Steady State vs. Improved Retention



# Oakland University

## Success and New Context

### Enrollment Projections 2020 Scenario – Increase FTIAC Retention

<u>Year</u>	<u>Steady State</u>	Improved Retention <u>Scenario</u>	<u>Target</u>
2010	19,053	19,053	19,604
2011	19,382	19,583	20,192
2012	19,756	20,105	20,797
2013	20,119	20,592	21,421
2014	20,458	21,055	22,064
2015	20,809	21,549	22,616
2016	21,179	22,095	23,181
2017	21,507	22,643	23,645
2018	21,825	23,233	24,117
2019	22,123	23,867	24,600
2020	22,416	24,420	25,092

*Revised: Nov. 2010, OIRA*

# Oakland University

## Success and New Context

### Action Agenda Retention

**Collaborative and coordinated** - Leadership for student success is everyone's job.

- **Consistently reinforce high expectations for student performance** - & provide support to meet academic challenges.
- **Clearly define pathways to success**
  - clear curricular paths, course availability
- **Pay attention & use data to improve**

*Source: Schartman, Laura, "Focus on the Finish Line: 2010, Students at the Research Fair, New Student Convocation." October 2010.*

# Oakland University

## Success and New Context

### Action Agenda Retention

- **Challenging & engaging academics**

*“...the most important thing a college can do to help students graduate is often to ask more of them, not less.”*

- **Accessible & responsive faculty**
- **Focus on teaching excellence**
- **Launch First and Second Year Advising Center**

*Source: Schartman, Laura, “Focus on the Finish Line: 2010, Students at the Research Fair, New Student Convocation.” October 2010.*

# Oakland University

## Success and New Context

### Action Agenda Graduate Enrollment

- Streamline graduate study enrollment management processes
- Reorganize office (functions, services, hours)
- Expand market share
- Implement graduate program review recommendations
- Expand communications and marketing (technology)
- Find new markets (online, geographic, displaced workers, veterans, etc.)
- Immediately put in new steps to retain graduate students

# Oakland University

## Success and New Context

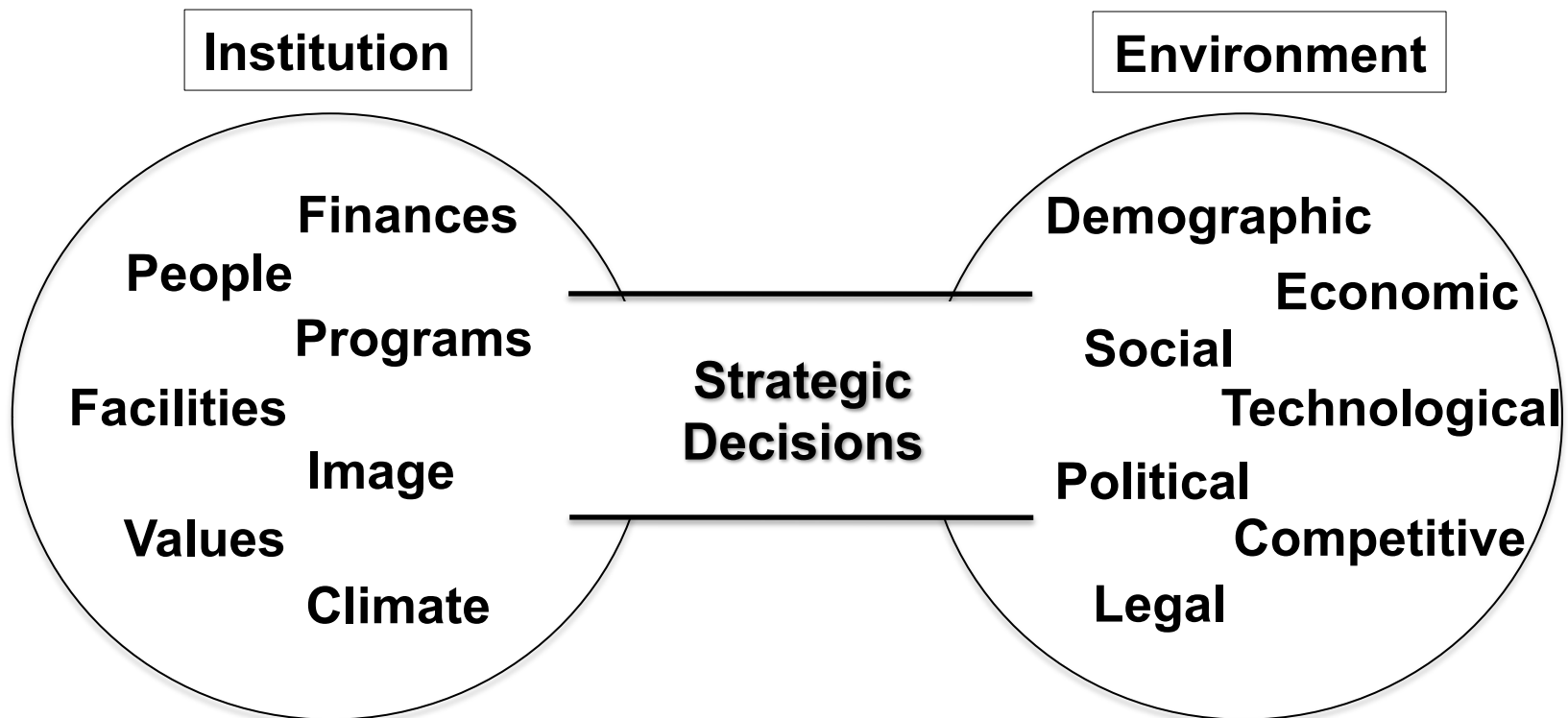
### Action Agenda E-Learning

- Target 1-2 programs in each school or college to develop online each year
- Assign program coordinator for each targeted program
- Relook at definition of online, i.e., programs with internships, programs to bring students to campus for short period of time, 100% online except final exams, etc.
- Review accreditation and policy development
- Integrate work-related experience and give certificate
- Each program to have a “name” instructor/contributor

# Oakland University

## Success and New Context

### The Institution – Environment Connection





**Oakland University**

**Success and New Context**

**Oakland University  
1997-1998**

**Creating  
The Future  
Oakland University**

# Oakland University

## Success and New Context

### **Total Task Force Membership – Creating the Future**

- 280 Business and Community Leaders, Faculty, Staff and Students

# **Oakland University**

## **Success and New Context**

### **Oakland University “Creating the Future” Benefits**

- Elevate profile of OU in the community
- Leverage expertise
- Build friends

**Oakland University**

**Success and New Context**

**Oakland University  
2010-2011**

**Creating**  
**The Future**  
**Oakland University**



**Creating**  
**The Future II**  
**Oakland University**

# Oakland University

## Success and New Context

### CREATING THE FUTURE II

#### Recommendation

That the Oakland University Board of Trustees approve a bold new initiative to engage the community, government and corporate leaders, our alumni and friends and university faculty and staff in a dialog of how OU can play a pivotal role in rebuilding Michigan's economy and addressing concerns that could have a national impact in the areas of research and education.

# **Oakland University**

## **Success and New Context**

### **CREATING THE FUTURE II**

#### **Benefits to OU**

- Elevate the profile of the university in the community, working to solve problems of mutual interest to the external community and the university, thereby improving the region, state, and nation.
- Identify and engage more people in the life of the university.
- Cultivate new friends and develop strategic alliances, collaborations, partnerships and direct support.

# **Oakland University**

## **Success and New Context**

### **CREATING THE FUTURE II**

#### **Benefits to OU (cont'd)**

- Leverage expertise from the foremost authorities on how to accomplish some of the tasks that await OU.
- Create an awareness within the philanthropic community on how an investment in OU can make a lasting impact.
- Recalibrate OU's 2020 Vision based on information realized from this work.

# Oakland University

## Success and New Context

### Action Agenda Partnerships

- Oakland and Macomb Counties remain economic, financial, intellectual, and cultural hubs of Michigan – the two-county region is home to roughly 1 in 5 Michigan residents and 1 in 4 Michigan jobs. OU's location means it is positioned to be the educational institution of choice. If OU can more effectively engage with its community partners, its preeminent position should be bolstered for years to come.

*Source: Public Sector Consultants, "Oakland University 360-Degree Environmental Scan," December 2010*



# **Oakland University**

## **Success and New Context**

### **Action Agenda Fundraising**

- Implement CTF II
- Start new campaign

# Oakland University

## Success and New Context

### Action Agenda Operations

- Lean processes drive out waste
- Improve efficiency
- Implement strategies to reduce costs
- Reorganize as necessary
- Redirect funds from casual and temporary workers to student employment, expand student employment opportunities
- Make hard decisions (on bus or off bus)

# Oakland University

## Success and New Context

### Action Agenda

#### Marketing and Visibility

- Building OU **brand** regionally, nationally...Strengthening position among competitors
- UG and grad student recruitment ad campaigns, regionally and in out-state markets
- Fundraising communications to advance campaign, institutional vision, grow donor and alumni base
- Hire Senior Director, Communications and Marketing

**Oakland University**

**Success and New Context**

# Summary

**Oakland University**

**Success and New Context**

# Question & Answer