OVERVIEW
As the University begins its 2021-22 academic year, it also embarks upon a strategic planning effort for subsequent five academic years. It is essential that this strategic plan be grounded in the mission of the University, build on past successes, including those achieved in its last strategic plan, and aspire to achieve new goals. The next strategic plan will guide the University’s financial and operational planning and the establishment of priorities in its decision-making. It is imperative that this plan state what the University intends to accomplish in measurable terms and outline a means to do so.

The process for planning the University’s strategy will include the solicitation of input from the various constituencies of the University community. A Strategic Planning Committee of 15 individuals representing various divisions of the University will determine the themes of the strategic plan and target outcomes related to these themes. The Committee may convene sub-committees to develop strategies to achieve the desired results. The Committee will then review and organize proposed themes and strategies and develop a proposed strategic plan to be voted on by the Board of Regents at its May 2022 meeting.

TIMELINE
- In September 2021, a Strategic Planning Committee, co-chaired by Eric Barger, Vice President for Financial Affairs and Herbert A. Medina, Acting President and Provost is assembled. (Committee roster is included at the end of this document.)
- Committee is convened in October.
- In-person listening sessions (deliberate preliminary dialogues) will be conducted in late October and November. These sessions, to be conducted by members of the Strategic Planning Committee members, should be guided by broad questions and the initial proposed themes. Some of these listening sessions should be for a broad audience and some may have a focused audience (e.g., students, faculty, division staff, etc.).
- In early December, the Committee will assess the input, perform additional exercises, and determine the main themes of the Strategic Plan and goals associated with those themes. The themes will be presented to the Board of Regents at their January 2022 meeting for input.
- The Strategic Planning Committee may then form subgroups or convene subcommittees to develop specific strategies to achieve the goals in February. Concurrently, the Strategic Planning Committee will conduct additional listening sessions around the developed themes of strategic plan.
- In March, the Steering Committee will assess the strategy proposals and compile a proposed strategic plan.
- University leadership will review the proposal in April, modify as necessary, and prepare to present the plan to the Board of Regents at its May meeting. (If process takes longer than envisioned above, presentation to the Board of Regents will take place at the September meeting.)
- The President’s Leadership Cabinet and the Provost’s Council will be kept informed of during the process and will have a continual opportunity to provide input.

Below we offer some parameters/guiding principles to guide the strategic planning process.
INDISPENSABLE, FOUNDATIONAL CHARACTERISTICS ABOUT UNIVERSITY OF PORTLAND TO HELP GUIDE STRATEGIC PLANNING

• The University is a Catholic University with a strong relationship to the Congregation of Holy Cross.
• The University will remain as a private, not-for-profit, primarily-undergraduate institution, with a strong liberal arts focus, and an approximate enrollment of 4,000 (± a few hundred).
• During the fall and spring semesters, the University’s undergraduate education offerings will remain primarily in-person.
• As residentiality is a central component of the Holy Cross educational experience, the University will continue to have a significant portion of its student body in on-campus residences.
• The University is an NCAA Division I educational institution.

OTHER IMPORTANT PARAMETERS TO KEEP IN MIND DURING STRATEGIC PLANNING

• The themes of the strategic plan should relate directly to the mission.
• The strategic plan should build on the goals and achievements of the last strategic plan, Vision 2020. (Pilots Vision 2020 page on Pilots has further information on including a Tableau dashboard that documents UP’s progress on the plan.)
• The goals should affirm and strengthen the University’s Catholic identity.
• The goals and strategies should maintain or enhance standards of academic excellence.
• The themes and goals should enhance the University’s efforts to improve diversity, equity, inclusion and justice.
• The strategic plan should include 3-6 overarching themes.
• The goals of the strategic plan should be aspirational, achievable, and measurable.
• The goals of the strategic plan should be informed by the University’s character as a tuition-reliant institution, and should appropriately reflect the University’s commitment to budgetary and fiscal responsibility.
• The strategic plan should empower University stakeholders to seek external support (e.g., from grant-making organizations and benefactors) to fund key institutional initiatives.
PRELIMINARY SET OF THEMES TO CONSIDER

The following is a set (certainly non-exhaustive) of themes (numbered) and subthemes/strategies (lettered) to explore in the strategic planning process. Please note that some of the subthemes may indeed belong to more than one overarching theme.

1. Continued focus on and expansion of the University’s Catholic, Holy Cross mission, especially as it relates to tenets of Catholic Social Teaching (common good, social and environmental justice, solidarity, equity & inclusion, etc.) and as it promotes and centers undergraduate student formation and development
   a. Enhancement of opportunities for students, faculty and staff to explore transcendental questions and engage in spiritual formation
   b. Strengthened focus on and expansion of diversity, equity, inclusion and justice work, including enhanced opportunities for community member engagement in cross-cultural settings
   c. Continued attention and investment in the undergraduate student experience, including development of a new student center to enhance our Holy Cross hospitality & community building efforts
   d. Continued focus on ensuring that a significant portion of the student body remains Catholic

2. Enhancing academic excellence and other formation/educational/professional growth experiences for students and faculty
   a. Expansion of facilities for health-sciences related programs (e.g., nursing, anatomy & physiology) to promote excellence in instruction and remain competitive with peer institutions
   b. Expanding undergraduate research, internships, and other outside-the-classroom academic and professional growth experiences for students
   c. Ensuring that faculty have resources and support, physical, financial, and otherwise, to enhance and produce scholarship and creative work
   d. Increased focus on expanding University of Portland’s reputation as a leading and engaged intellectual hub, locally, regionally, nationally, and globally
   e. Review, set goals and make necessary adjustments to the staffing of course offerings by faculty type (i.e., tenured/tenure-track, full-time non-tenure-track, adjunct)
   f. Continue to provide training for, adjust the balance of, and refine modes of instruction (in-person, online, hi-flex, etc.) to best serve the needs of existing students and broaden opportunities for recruitment of new students

3. Broadening and diversifying student enrollment and continued focus on retention for all students
   a. Continued focus on and improvement of the University’s retention, persistence and graduation rates
   b. Expansion of the University’s student recruitment markets to other geographical areas including states where there are projections of growth in high school population (e.g., TX).
   c. Increase in the number of transfer students
   d. Increasing graduate certificate and degree program enrollment including the consideration of offering courses in a high flex format
   e. Expansion of scholarship support provided to students
   f. Establishing aspirational parameters on mitigating student debt upon graduation and planning a strategy to achieve those parameters

4. Strengthening University staffing and personnel and the retention of employees, with the intention of making UP an employer of choice in Portland and in higher education
a. Engage in a comprehensive review of staff salaries & benefits and commit to a plan to achieve any necessary adjustments
b. Staffing levels should keep track with institutional size/growth
c. Develop a University program for employee wellness
d. Mission alignment should continue to be an important part of the hiring process for faculty and staff
e. Develop internal career ladders to provide opportunities for career development and enhancement within UP

5. Improving existing processes, systems, and developing new initiatives to ensure the operational and financial health of the institution
   a. Continued focus on improving efficiencies (e.g., digitizing processes) where possible to enhance and improve operational effectiveness
   b. A culture of shared governance and transparency should continue to be cultivated as it enhances institutional effectiveness
   c. Reviewing and, where necessary, investing in the University's physical infrastructure to improve the experience of University constituents and maintain market competitiveness
   d. A continued focus on sustainability and other environmental matters should be at the forefront of decisions made on operational and infrastructure matters
   e. Leveraging and enhancing existing University resources in an effort to increase ancillary sources of revenue; e.g., expansion of summer course offerings, creation of summer programs, greater usage of University facilities, etc.
   f. Optimizing University operations for efficiency and environmental sustainability.