

SP4.0 Implementation Update

The implementation of SP4.0 is led by Senior Vice Provost Susan Capalbo, who chairs an implementation steering committee made up of the action leaders for each of the 20 strategic plan actions (see Table 1). Action leaders are responsible for:

- Determining the sequencing of tactics for the assigned action;
- Convening tactic leaders and relevant stakeholders;
- Refining/revising tactics and plans for implementation as needed; and
- Assembling annual updates of progress on assigned action and associated tactics.

Progress updates by action are posted from time to time on an SP4.0 implementation web page. An annual strategic metrics report is being prepared by the Office of Institutional Analytics and Reporting. The first full metrics report is targeted for completion in March.

Highlights of recent accomplishments and activities underway under each action are provided below. This is not a comprehensive summary of all tactics being pursued.

Action 1: Continue building and supporting a diverse, world class faculty.

- Human Resources and Faculty Affairs are collaborating on the implementation of a coordinated strategic talent management approach for recruiting, diversifying, developing and retaining OSU's R1 faculty workforce, launching in 2020.
- Plans for the commission on the 21st Century professorate—which will focus on how the professoriate is evolving and how the university can best recruit and support faculty, given its land grant mission.
- A faculty needs assessment and faculty climate survey are planned for 2020.
- The university is creating an Academic Leadership Academy (ALA) to provide additional leadership training for new academic unit leaders, mentorship opportunities for faculty who are in leadership roles, and communities of practice to support leaders' work. An associate vice provost is being hired to run the ALA and faculty development program.
- A post-doctoral program to support young scholars and expand recruitment of underrepresented faculty is under development.

Action 2: Provide distinctive curricula and support innovated pedagogy suited to our mission and vision.

- Efforts by the Faculty Senate and administration are underway to reform the Baccalaureate Core, with implementation targeted for June 2022.
- A new director for the Center for Teaching and Learning was hired in fall 2019. The initial focus for this position is expanding training and support resources for instructional faculty.
- First year seminars are in development at OSU-Cascades to further the goal of offering a more intimate learning experience to undergraduates.

Action 3: Diversify our research portfolio and strategically build our graduate programs.

- The Graduate School is leading a university-wide effort to produce OSU's first strategic plan for graduate education. This will be completed in 2020.
- The university has organized targeted sessions (i.e. "Ignite" colloquia with varying themes) to help make connections among potential principle investigators (PIs) ahead of major funding opportunities.
- The university is strengthening its use of data analytics tools to target specific faculty for recruitment (e.g., Academic Analytics and Pivot).

Action 4: Retool the OSU experience for the 21st century learner.

- Integrating Ecampus into University-wide committees to represent the online, transfer, and non-traditional students and help modify policies and communications to enhance the success of distance and low income students.
- In collaboration with other units, the Division of Student Affairs is systematically reviewing systems and structures across the university that may be presenting barriers to success for students of color, first generation students, students with high financial need, and transfer students. Initial focus areas relate to student employment, access to experiential learning, the design of instructional materials, and access to basic needs.
- The Division of Enrollment Management has added additional staff to speed articulation of credit for transfer students and to support transfer student advising.

Action 5: Implement an integrated approach to recruiting and enrolling learners at all levels.

- The university is implementing Slate, a powerful customer relationship management system, to support admissions.
- A recruitment summit with key members of marketing and communications functions within the colleges has been convened, and work has been done with two deans to reconceptualize the roles of newly hired admissions staff members within those colleges.
- Enrollment Management is engaging senior-level administrators at four key community college feeder schools to expand on-site OSU advising at the community college campuses.
- A Senior Associate Director of Admissions was hired to focus on transfer admissions and recruitment (see also transfer student support work under Action 4).

Action 6: Substantially improve our physical and administrative research infrastructure

- Oregon State, the University of Oregon, Oregon Health and Science University, and Portland State University implemented an internal research facility rate agreement that makes it more cost-effective for faculty to take advantage of existing research infrastructure at participating schools.
- The university's Research Office (RO) is strengthening core research infrastructure and procedures to support the preparation and administration of larger-scale projects.

- The RO is assessing several “ticketing” software systems for tracking by PIs of research administration inquiries.
- RO is evaluating software tools that can support research development and the management of proposals for internal competitions (e.g., Pivot and Infoready).

Action 7: Increase experiential learning opportunities and ensure access.

- A new curriculum management system (CIM) has been implemented that specifically prompts course proposers to indicate whether their course will have experiential learning or other high-impact components. This will improve the university’s understanding of the scale and distribution of its experiential learning offerings.
- The Experiential and Research Learning subcommittee of the Undergraduate Student Success Initiative is addressing mechanisms that would experiential learning and participation in research visible on transcripts.
- Work is underway with the OSU Foundation—as a priority for the capital campaign—to articulate the value and impact of experiential learning to prospective donors.

Action 8: Expand pathways to an OSU credential.

- The Division of Enrollment Management is working with the OSU Foundation to articulate the most significant needs in undergraduate scholarships and other areas of admissions, as part of planning for the upcoming campaign.
- The university is reviewing its financial aid allocation strategy to determine whether revisions are needed to optimize aid and scholarships to meet the university’s inclusive excellence mission.
- Two additional transfer document staff have been hired to streamline the review of credentials and increase throughput of transfer credit evaluation. (Also relevant to Action 4 and 5).
- Ecampus recently conducted a statewide needs assessment of adult learners interested in seeking online/hybrid degrees in the next three years (in Oregon, Seattle, and the San Francisco Bay area) to better understand desired credentials, degree types, delivery preference and brand awareness.
- Ecampus is expanding its capacity to negotiate agreements with corporations seeking affordable pathways to degrees for their employees (similar to OSU’s agreement with Peet’s Coffee).

Action 9: Make strategic investments in interdisciplinary and transdisciplinary scholarship, teaching and engagement.

- Two health sciences task forces are being formed and charged to explore OSU’s opportunities in the biomedical and population health sciences.

Action 10: Integrate inclusive excellence principles and practices into all aspects of the university.

- The “We Have Work to Do” campaign—which focuses on building awareness and motivating participation in diversity efforts—continues.
- Sea Grant Pathways with Siletz Tribe have been established.
- Native American Ecampus enhanced support program established.
- OSU hosted Oregon Indian Education Association conference to advance awareness of OSU to tribal communities.
- University has strengthened connections with Oregon high school districts including Jefferson High School, Portland Public Schools as well as other Metro area schools.
- Repatriations of artifacts have been completed with the Coquille Indian Tribe, Oregon Parks and Recreation Department, and the Field Museum in Chicago.
- Established the Social Impact Lab, a collaboration with community organizations, local governments, and business and industry partners to help connect OSU expertise and resources to community needs.
- Notable accomplishments:
 - Hosted African American Youth Leadership Conference.
 - Hosted the annual standards meeting of the [National Association of Diversity Officers in Higher Education \(NADOHE\)](#) with more than 50 Chief Diversity Officers from around the country participating.
 - Completed the 2018 Campus Climate Assessment to inform diversity planning and initiatives.
 - Reenacted the historic Black Student Union walkout of 1969.
 - Held the second annual Breaking Barriers awards ceremony. Breaking Barriers highlights the impacts women make across campus and in the community.

Action 11: Increase our retention and graduation of students.

- Redesigned and implemented changes to support systems for students’ transition from admission to the end of the first year of enrollment. One element of the redesign is the improvement of collaboration between First Year Experience Coordinator and Transition Coordinator (both in the Office of Undergraduate Education) with the advisors within the colleges.
- The university and individual colleges have increased investments in completion and persistence grants using philanthropic and university sources.
- The university implemented system to improve coordination between central campus and the colleges in the awarding of completion grants.
- The divisions of Undergraduate Education and Information and Technology are collaborating on the design of a better suite of digital tools supporting instructors and advisors.

Action 12: Further internationalize OSU.

- The University International Strategies Council convened in October 2019, after several year's hiatus, and initiated the development of a strategic plan for internationalization and global engagement. A the plan will be complete by the end of the academic year.
- OSU is part of a new University Access Center (UAC) in Vietnam in partnership with INTO. INTO's UACs provide an on-the-ground point of engagement with prospective students and a facility that partnering universities may use for various activities (alumni engagement events, lectures, meetings with existing and prospective university partners in-country, etc.). OSU was a founding partner in INTO's first UAC, which opened in Suzhou, China in 2018.

Action 13: Support interdisciplinary education, research and engagement on healthy ocean and coasts through the Marine Studies Initiative.

- A Marine Studies Initiative (MSI) administrative working group of senior university leaders has been established to improve coordination in developing academic programs, housing, and other elements of the project.
- A new social sciences and humanities-based degree in marine studies has been designed and is under consideration by the Faculty Senate.
- A two-phase housing plan for Newport/HMSC has been developed and implementation is underway.
- Several hires are in progress to support the expanded delivery of experiential learning at the Oregon coast.
- The MSI office is working to connect collaborators across disciplines to encourage additional research activity focused on expanding food derived from the ocean.

Action 14: Reduce our carbon footprint.

- The university is exploring ways to create a funding stream for smaller projects that would accelerate reduction of the university's carbon footprint. Part of this involves reviewing the Ten-Year Capital Forecast and possible capital improvement and renewal (CIR) projects that might be supported by the Energy Trust. It also involves exploring the creation of a fund for smaller projects that do not qualify for CIR.
- Revisions to the university's construction standards that would advance the goal of sustainable development have been drafted and are being vetted with the Infrastructure Working Group. Goal is to adopt in 2020.
- The project managers' manual is being revised to incorporate clear expectations that design and construction teams assess the long-term impacts of design choices and total cost of ownership.

Action 15: Strengthen our support system for innovation and entrepreneurship.

- A review of OSU's intellectual property, licensing, and revenue distribution policy is underway to ensure alignment with national best practices and that faculty

entrepreneurship, innovation activities and commercialization of OSU innovations are properly supported.

- An innovation and entrepreneurship (I&E) promotion and tenure review committee has been charged to review existing guidelines, compare with other institutions, and make recommendations that would improve incentives for I&E activity. OSU received a \$438,000 NSF award in support of this effort and to host a related national summit in September 2020.
- A framework for an innovation and entrepreneurship program has been drafted to identify and align practices and activities across the university, close gaps the innovation ecosystem, and define additional opportunities for investment to support I&E. As of this date, chairs/leads have been identified in collaboration with colleges, the OSU Foundation and the Alumni Association.

Action 16: Retool our approach to university-industry and alumni, parent and friend engagement.

- An inventory of OSU's engagement activity either already underway or are planned is being compiled to inform necessary changes and/or investments.
- A stakeholder group is scheduled to meet in early 2020 to review the inventory and determine next steps.

Action 17: Clarify vision, communications and governance guiding our physical and digital footprint.

- A campus master plan for OSU-Cascades was approved by the Bend City Council.
- Initial work on a long-term vision plan for the Hatfield Marine Science Center got underway in 2019.
- The Corvallis Campus Vision is being finalized.
- To expand readership and engagement, University Relations and Marketing (URM) is making changes to *OSU Today*; expanding content within *LIFE@OSU*; improving management of university listserv messaging; making improvements to internal-to-OSU web pages; and utilizing consistent messaging that portrays OSU as a university with many locations throughout Oregon.
- URM is developing a more standardized review process for campus-wide messaging by university leaders, in order to manage the frequency of messages to all faculty, staff and students and ensure consistency.

Action 18: Strengthen alignment within the university among our branding, marketing, communications and public affairs efforts.

- URM undertook a brand review of the marketing work of all colleges, units and divisions; results were reported to deans and division and unit leaders, as well as senior leadership, to inform the identification of needed improvements and next steps.
- Website and digital brand reviews for a selection of colleges, units and divisions was completed in fall 2019 by URM.

- Media fellowships for national and regional journalists continues; in 2018, URM held a 3-day marine media fellowship for 12 national journalists and, in 2019, URM conducted a 2-day fellowship for 12 journalists from throughout the Pacific Northwest.
- URM has expanded media tracking of print, digital and broadcast reports with the goal of putting more OSU faculty before local, regional and national media as subject experts.
- “Saving Atlantis,” a film documentary produced by OSU Productions on the work of OSU researchers to address the demise of the world’s coral reefs, is being viewed by growing audiences in national and global communities.

Action 19: Implement a comprehensive talent management system.

- The Office of Human Resources (HR) is leading the university’s effort to transition to a best-practice strategic human resources operating model to support comprehensive talent management (see also work underway under Action 1).
- HR, in collaboration with Faculty Affairs and other units, introduced a talent management plan, including specific projects over a four year time horizon to support workforce planning, talent acquisition and onboarding, performance management, talent development, diversity, career development and retention, and total rewards.
- Implementation of 2020 project plan will include specific focus on talent acquisition and management development, evaluation of talent management technology strategies to accelerate transition to modern management practice, and metrics and analytics to assess and prioritize talent acquisition and development priorities and investments.

Action 20: Integrate and simplify technology systems, data practices and policies to increase our organizational agility.

- A new IT strategic plan is being developed and will be completed by June 2020.
- The university’s information governance structure is being revised as part of effort to make data more more freely (but still appropriately) available to managers and decision makers.

Table 1. SP4.0 Action Leaders

ACTION		LEADER
1	Continue building and supporting a diverse, world class faculty	Susan Capalbo
2	Provide distinctive curricula and support innovative pedagogy suited to our mission and vision	Alix Gitelman
3	Diversify our research portfolio and strategically build our graduate programs	Phil Mote
4	Retool the OSU experience for the 21st century learner	Dan Larson
5	Implement an integrated approach to recruiting and enrolling learners at all levels	Jon Boeckenstedt
6	Substantially improve our physical and administrative research infrastructure	Irem Tumer
7	Increase experiential learning opportunities and ensure access	Alix Gitelman
8	Expand pathways to an OSU credential	Lisa Templeton
9	Make strategic investments in interdisciplinary and transdisciplinary scholarship, teaching and engagement	Sherm Bloomer
10	Integrate inclusive excellence principles and practices into all aspects of the university	Charlene Alexander
11	Increase our retention and graduation of students	Alix Gitelman
12	Further internationalize OSU	Kendra Sharp
13	Support interdisciplinary education, research and engagement on healthy ocean and coasts through the Marine Studies Initiative	Jack Barth
14	Reduce our carbon footprint	Mike Green
15	Strengthen our support system for innovation and entrepreneurship	Susan Capalbo
16	Retool our approach to university-industry and alumni, parent and friend engagement	Toni Doolen
17	Clarify vision, communications and governance guiding our physical and digital footprint	Steve Clark
18	Strengthen alignment within the university among our branding, marketing, communications and public affairs efforts	Steve Clark
19	Implement a comprehensive talent management system	Cathy Hasenpflug
20	Integrate and simplify technology systems, data practices and policies to increase our organizational agility	Andrea Ballinger